

NaCCRA LIFELINE

*The Resident's Watchdog...
The Industry's Friend*

National Continuing Care Residents Association

Vol. 15, No. 6

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November/December 2010

President's Report



Dear Friends,

The National Meetings of AAHSA and NaCCRA in Los Angeles brought together some new faces of NaCCRA because our earlier meetings have been mostly in the Eastern part of the country even including last year's in Chicago. We are energized

by the growing enthusiasm for NaCCRA among the residents of CCRCs along the western seaboard. The opportunity for exchange of ideas and alerts is unlimited.

NaCCRA has been invited to join the nationwide concern related to Hand Gun Control distinguishing the rightful ownership of rifles for hunting from that of misuse

of handguns. In one year, handguns murdered 17 people in Finland, 35 in Australia, 39 in England and Wales, 200 in Canada and 9,484 in the United States. Every major city in the country is reporting increasing incidents of handgun abuse with a heavy toll among teenagers. The grandchildren and great grandchildren of CCRC residents are among those being affected.

Every national organization in the country is being enlisted to overcome the hesitancy on the part of the US Congress to address the issue. It is a non-partisan concern that accounts for the numerous national organizations now involving themselves. One of the indirect means of challenging youth is to have CCRC residents offering teaching skills to keep youth in high school and not drop outs who are among the heavy users of handgun abuse. Youth can be dropped off at CCRCs after school for reading and writing exercises. Every high school student assisted is one less to become involved in acquiring hand guns for their so called self defense.

A year ago, when I moved to a different CCRC, one of the movers reminded me that when he was in high school he learned how to box for self-defense, now the handgun has taken its place. I await your suggestions and stories.

*Most sincerely,
John T. Mathison, President*

NaCCRA Officers . . .

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Check out our website at: www.NaCCRA.com

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Editorial

This issue is traditionally devoted to reports from the NaCCRA and AAHSA meetings which are held in the fall. The 2010 sessions were in Los Angeles (CA), which somewhat limited our traditional eastern seaboard attendance but we were gratified to have enthusiastic participants from California and for the first time from Oregon and Washington. A resident initiated session was held at the AAHSA meeting which was extremely well attended and received, breaking new ground for our association. A report on the session appears in this issue.

We elected a new treasurer to assume office immediately and named a president-

elect who will assume her responsibilities after our April 2011 meeting. Some new initiatives are on the drawing board and we look forward to reporting on their progress in future issues.

Membership continues to grow with record numbers in community resident association memberships as well as individual memberships. Our thanks to all our readers who are helping make this possible under the excellent leadership of Membership Vice President Len Sikora and your board.

We acknowledge with gratitude the growing number of contributions that allow us to explore additional informational services for our members. We continue to encourage article submissions.

Marleen A. Varner, Editor

Letters to the Editor

Dear Editor:

I have had several good phone, letter and email communications in response to the September/October NaCCRA newsletter, including the President's report on important, recent CCRC studies, with favorable comments on my own short article. I'm hopeful that momentum is building for greater recognition and protection of resident rights in these settings, and I look forward to working with individuals, resident groups, and state associations in drafting efforts.

Might it be permissible for me to excerpt my article, with appropriate attribution to your newsletter, of course, and include it on my publications page? Here is the citation to that page: http://law.psu.edu/faculty/resident_faculty/pearson/articles

I get a fair number of requests for brief comments, and it seems helpful to provide folks with direct links to existing publications.

Thank you,
Professor Katherine C. Pearson
The Dickinson School of Law, The Pennsylvania State University
333 West South Street, Carlisle, PA 17013
Direct Line: (717) 240-5219
http://law.psu.edu/faculty/resident_faculty/pearson

ED: Yes, of course. We appreciate your strong leadership on this important issue.

Dear Editor:

It's a shame we didn't have an opportunity to sit down and talk with each other when you were in Pleasant Hill for the dedication of our new Wharton Homes. That was a very rushed occasion, for me, at any rate.

Residents have since moved in and their quality of life has improved significantly. Those who use to stay in their rooms are now coming to the tables, and feeding themselves. Volunteers from the wider Uplands community are providing increased programming, and permanently assigned staff have all received training in resident-directed care, as recommended by the Eden Alternative.

My own life has been busy. In June, I flew to Denver to be named 2010 International Eden
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NaCCRA exists for the purpose of promoting, supporting and protecting the chosen life style of Continuing Care Retirement Community (CCRC) residents in the United States. NaCCRA is the only national organization for CCRC residents and is dedicated to the promotion of continuing care resident communities as a humane, cost-effective, long-term care model for elderly individuals. Its work is conducted solely by volunteers and support comes from dues and gifts.

The Association since October 2000 has been classified by the IRS as a tax exempt 501(c)(3) Corporation. Donors may deduct contributions as provided in section 170 for Federal estate and gift tax purpose if they meet the applicable provisions of sections 2055, 2106 and 2522 of the Code.

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MINUTES

National Continuing Care Residents Association Fall Meeting, Los Angeles, October 31, 2010

President John Mathison called the meeting to order at 3:40 p.m. Persons from ten states attended the meeting. Minutes of the Annual Meeting, April 11, 2010 were approved as posted in the May/June, 2010 issue of *LifeLine*.

The Statement of Income and Expenses for the period ending September 30, 2010, submitted by retiring Treasurer Kermit Scheele was accepted. The annual budget was \$21,000 with a total of \$16,567 on hand. President Mathison noted that expenses for the fourth quarter would be relatively high because of costly travel expenses due to the location of this year's fall meeting. Next year's meeting will be in the Washington DC area and travel expenses are expected to be considerably lower. Treasurer Joseph Walton would be assuming office at the close of this meeting, the President said. There was discussion of the need to build an endowment fund and to strengthen the budget.

Walt Rozett, former President of CALCRA, welcomed those attending the meeting. He said that CALCRA, in its 15 years of existence, had been active in the passage of a dozen bills through the state legislature that helped secure financial stability and protect the quality of life of elders in California. There are 80 CCRCs in California with 2,000 residents. President Mathison expressed appreciation for CALCRA's hosting of this meeting and commended the organization on its strength. He said state organizations could be helpful in spreading NaCCRA nationally.

President Mathison reported favorably on the October 30, 2010, meeting of the House of Delegates, which he and Vice President for Publicity Marleen Varner attended. The House of Delegates is a leadership group of 200 members. It acted to change the name of AAHSA to Leading Age as of January 25, 2011 in celebration of the fiftieth anniversary of its founding. (AAHSA is the professional organization for not-for-profit eldercare communities.) Also, it decided that a Policy Forum would replace the House of Delegates.

President Mathison introduced Susan Matthieson, General Manager of CARF, an international organization founded in 1966 for the accreditation of CCRCs. He said he finds CARF's directory useful in recommending communities.

Vice President for Legislation Julia Hix reported that resident input was important in the passage of HR 1586 last August. The Act prevents extensive cuts to healthcare providers, including skilled care units in CCRCs; the Act extends the Federal Medical Assistance Program until June 2011. Vice President Hix also reported that NaCCRA joined AAHSA in celebrating the passage of the American Housing and Foreclosure Act, which will help preserve the supply of senior housing. She urged that NaCCRA members now help AAHSA press Congress to extend excep-

tions for caps on Therapy, due to expire December 31, 2010. A sample letter to Congressmen is available on the AAHSA website. AAHSA, like NaCCRA, is non-partisan in its attention to legislative issues affecting the quality of life for seniors.

Vice President Hix stressed the importance of developing a National Bill of Rights for residents of CCRCs to assure financial accountability and transparency and to assure an acceptable quality of life. She commended the report of the US Senate Special Committee on Aging, chaired by Senator Herb Kohl, on "Continuing Care Retirement Communities: Risks to Seniors." The Vice President's legislative report was received with enthusiasm by the meeting.

The Membership report from Vice President Leonard Sikora was received. President Mathison recommended that every member CCRC should appoint a recruitment chair. He noted the success of Recruitment Chair Page Hawk of Ingleside at Rock Creek in extending the sense of personal invitation to potential members.

Vice President for Publicity Marleen Varner, Editor of *LifeLine*, reported that, since last spring, she has broadened her search for articles and recruited new writers. She has carried reports on the GAO study of CCRCs and worked on advocacy issues suggested by Legislative Vice President Julia Hix. Vice President Varner continues to support the work of other NaCCRA officers and to help with membership recruitment. A donation line has been added to the membership application form published in *LifeLine*. A \$1,000 contribution was recently received from a Florida resident association and some smaller gifts as well. Vice President Varner personally purchased new, cost-saving computer software last summer when she moved into Deerfield Retirement Community in Asheville, NC.

The report of the Nominating Committee was received and the nominees elected. President-elect Ruth Walsh, currently President of ConnCCRA, will succeed Jack Mathison at the spring meeting on April 30, 2011. Born into a military family in 1929 in Wyoming, she lived in eleven different states before going on to university studies in Maine, New York and Connecticut. She served in the Women's Army Corps until her marriage and subsequently followed a career in education while rearing her daughters. She is active in church and volunteer work and is currently serving as President of the Mystic Scottish Country Dancers. On her election to the presidency of NaCCRA, she recognized "challenges to be faced" and "obstacles to be overcome." She expressed confidence that we may "call upon the pros for assistance and guidance" but said it is vital to "assemble a viable support team that will enable us to continue to grow and flourish."

Following the remarks of the President-elect, President Mathison introduced featured speaker Edward C. Merrigan, Managing Director and Director of Research of B. C. Ziegler Company, who addressed salient issues of the financial health and welfare of CCRCs across the country in these "scary times."

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Treasurer's Report

NACCRA

Statement of Income & Expenses for the period ending September 30, 2010.

INCOME	<u>2010 Budget</u>	<u>This Period</u>	<u>Year to Date</u>
101 – State Associations	\$ 3,500.00	\$ 700.00	\$ 3,480.00
102 – Community Members	2,000.00	900.00	1,200.00
103 – Individual Members	10,300.00	2,535.00	8,145.00
104 – Added Life Members	1,500.00	1,500.00	3,930.00
105 – Donations	200.00	1,065.00	1,135.00
106 – Meetings	3,500.00	---	693.00
TOTAL	\$ 21,000.00	\$ 6,700.00	\$18,583.00
EXPENSES			
201 – Officers' Travel	\$ 4,500.00	\$ 382.62	\$ 764.58
202 – Printing	5,000.00	2,189.03	4,118.41
203 – Postage	1,000.00	610.25	1,496.26
204 – Administrative Support	3,000.00	1,800.00	4,500.00
205 – Website	200.00	59.85	179.55
206 – Website Upgrades	2,500.00	359.16	856.96
207 – Telephone	---	---	---
208 – Supplies	1,000.00	57.44	323.17
209 – Meeting Expenses	3,300.00	50.37	3,239.33
210 – Other Expenses	500.00	---	---
TOTAL	\$ 21,000.00	\$ 5,508.72	\$15,478.26
Balance Forward June 30, 2010	\$ 15,376.16		
Income this period	+ 6,700.00		
Expenses this period	- 5,508.72		
TOTAL FUNDS ON HAND	\$ 16,567.44		<i>Kermit Scheele, Treasurer</i>

Help Fight for Therapy Caps Extension

Unless Congress extends the exceptions process, the annual therapy caps once again will limit Medicare coverage of medically necessary therapy services. For 2010, the caps were \$1,860 for physical and speech therapy combined and another \$1,860 for occupational therapy; the caps will be adjusted for inflation for 2011.

If the exceptions process is not renewed, beneficiaries whose therapy costs approach or exceed the cap will have three choices:

- * Obtain therapy in a hospital outpatient department, where therapy is not subject to the annual caps.
- * Pay out of pocket for therapy services.
- * Delay further therapy until the exceptions process is restored.

Please send a letter urging your legislator to pass legislation before the end of this year to keep the exceptions process in effect and ensure Medicare beneficiaries will have coverage for the therapy services they need. A sample letter is available at:

<http://capwiz.com/aahsa/issues/alert/?alertid=18745666>.

Join AAHSA's Consumer Listserv

AAHSA is launching an e-mail listserv for consumers interested in aging services. This forum is designed to be a place where you can ask questions, share ideas and find information about aging as well as services for older adults. We also want to connect these individuals to experts in the field who can provide insights on a variety of topics. We'd like to invite you, your fellow residents and friends to join this listserv. Please complete the online signup form here to be added to the list: http://www.aahsa.org/signup_consumer.aspx. Please feel free to contact Sarah Mashburn (smashburn@aaahsa.org) at (202) 508-9492 with any questions.

Your NaCCRA officers participate in this program and find it quite helpful in understanding various issues involving CCRCs. We occasionally post questions and the responses are most helpful. It also helps managers become more aware of resident issues and concerns.

A Resident Initiated Session at the AAHSA Conference

Seminar: 6-D Resident Empowerment: The Key to Excellence in Aging Services

Residents of Carlsbad by the Sea Retirement Community submitted a proposal to AAHSA Conference planners, requesting their proposed session be included on the agenda for the AAHSA Conference as an example of Resident Empowerment and its impact upon residents as well as management. The session was scheduled at 8 a.m. on Tuesday, the 2nd of November and was very well attended.

Participants on the panel included: Corinne Holt Sawyer, President of the Residents Council; Ray Killeen, MD, Chairman of the Residents Health Committee; Mary Beth Tompane, Chair of the Residents Legislative Committee; Jack Cumming, Chairman of the Residents Finance Committee; Roberta Jacobsen, President of Front Porch Communities and Services.

Carlsbad by the Sea is a Front Porch Community CCRC located 90 miles south of Los Angeles in a beautiful oceanfront setting right on the Pacific Ocean. The property, constructed some 50 years ago, underwent an expansive redecoration of the Lobby area in 2009, which was received with mixed reviews by the resident body. Some approved wholeheartedly, while others were extremely dissatisfied with the results. The Chairman of the Redecorating Committee was asked take a survey of the resident body to get a better sense of the feelings of all. A committee was formed to draft the survey form that would have specific guidelines – including the fact that the survey would be framed with a positive approach and that the survey results would “speak for themselves.” They neither intended that the survey be more than a tool to help one and all gain constructive knowledge, nor was it to be construed as a scientific investigation. In addition, management was made aware of the project and agreed with the premise that the survey and its resultant information would assist all in gaining constructive knowledge about this community. The ultimate objective was that the results would act as “the voice” of the residents and would signal the fact that “The Silent Generation” is at last standing up to be heard. At last, The Spirit of the Individual would correlate to the Strength of the Community. Residents can indeed work together with management to effect change and it is absolutely

critical that each individual take personal responsibility in the process. Each individual can “discover” how best to utilize his/her talents for the benefit of all. As one presenter indicated, “we don’t want to run the community, but there are measures we each can take to enhance our lives and those around us.”

The resident driven survey also pointed to the fact that the Residents Council would be well served to consider the feasibility of surveying itself and its mission; results would point the way to better addressing issues of concern to all, including the vital nature of resident involvement in the life of the Community. One and all need to be involved in the decision making process within the life of this very vital CCRC. One of the “side” results of the survey indicated that the Council would be well served to seek ways to “uncover” needs within the “family” as well as how best to challenge the diversity that is indeed a Hallmark of this very vital community By the Sea.

There were areas of controversy, including the fact that the remodeling of the lobby area will always be “up for discussion” – 42% negative “vote” and a 41% positive feeling about the refurbished area.

Those results notwithstanding, other indicators pointed to the fact that residents do like living at Carlsbad by the Sea and generally feel positive about their experiences:

- Residents find financial matters challenging.
- Health is a centerpiece of resident interest.
- Resident involvement can facilitate service performance.
- Residents would recommend CCRC living to others.
- Residents were generally positive in their response to the question regarding the luxury quality of Carlsbad’s food service department.

The Front Porch Community’s byline is to Live Life Your Way in a Front Porch Community and in general, that is the hope of both the residents as well as the management at Carlsbad by the Sea.

*Reported by Ruth Walsh,
President-elect, StoneRidge (CT)*

Minutes (continued from page 3)

State Association reports were submitted from California, Connecticut, Florida, Maryland, Massachusetts, New Jersey, North Carolina, Pennsylvania, Virginia and Washington.

A final item of business was a resolution presented by Vice President Varner expressing gratitude to Susan Weiss,

who is retiring as Senior Vice President for Advocacy for (AAHSA), for her years of service to NaCCRA and to the elder care field. The resolution was passed unanimously.

The meeting was adjourned at 5:50 p. m.

*Respectfully submitted,
Lynn Dizard, Secretary*



Officer Reports



Vice President For Public Relations/ Publicity, Fall Meeting, 2010

Much of my effort since our spring meeting has been devoted to working to upgrade *LifeLine*. I have broadened my search for appropriate articles and continued to bring information of interest from a wide range of state and community resident association to share with our members. In addition, I have continued to recruit new writers for our publication.

I have done liaison work with both the GAO Task Force and with the Continuing Care Accrediting Commission. I maintain my long-standing contacts with the National Senior Conservation Corp.

Part of my responsibility is to support the work of the other officers. I have actively supported membership recruitment, supported the revision in our membership application designed by Len Sikora, and followed through on our decision to a donation line to the membership application. Recently we have received a \$1,000 contribution from a Florida resident association and some smaller gifts as well. We continue to work on highlighting LIFE memberships and our growth in this area this year is commendable.

Working on advocacy in areas suggested by Legislative Vice President Julia Hix has also been significant this past six months. We have continued to carry many reports and comments on the GAO Study and make reports available to our members through other means. These efforts have yielded new members for our association from new areas.

This summer I ended my CCRC sabbatical and moved to Deerfield Episcopal Retirement Community in Asheville NC. With that move and my personal purchase of new computer software, we have been able to realize some savings on the printing and distribution of our newsletters. Website update is currently underway.

*Marleen A. Varner, Vice President,
Publicity, Public Relations.*



Vice President For Membership, Fall Meeting, 2010

Retirees in their active lifestyle of today may not have the interest to become members of any organizations.

Many feel that they just wish to enjoy their golden years. To get retirees to join any organization is difficult.

My primary goal this past year was to involve present

members in the membership process.

NaCCRA has two tools at its disposal that are very effective in membership.

1. The publication "*Lifeline*" is indispensable in getting our message to residents that this organization supports resident rights in retirement communities. Marleen Varner has done a remarkable job as editor. The membership application, which is printed in each issue, is an essential and important step in the membership process.
2. The other tool, that is most effective, is the personal contact members make with fellow residents to secure members. This is the most important component of membership in any organization. The monthly membership reports indicate the importance of personal contact.

Some suggestions for growth:

1. We need more support from AAHSA. NaCCRA represents the residents in continuing care communities and in many aspects it is the eyes and ears for AAHSA. NaCCRA should receive assistance from AAHSA. This association operates on a budget of approximately twenty thousand dollars. It is through the dedication of a few volunteers that we are able to exist.
2. NaCCRA should look to partnership with other organizations. Recently AARP, in a publication referred to NaCCRA. Leadership should explore the possibility of forming an alliance with other retiree associations. NaCCRA must also strengthen the status of our state affiliates.
3. Begin a discussion with CARF regarding the accreditation process. Membership in NaCCRA should be considered before a Community receives CARF approval. If resident involvement and input is important in the accreditation process, a community membership in NaCCRA should be a consideration in the CARF approval process. This would give the association greater national recognition.

Last but not least I commend the leadership of NaCCRA for giving residents a voice and medium to express their views. I am sorry that personal circumstances do not allow me to be with you.

*Len Sikora,
Vice President Membership*

The person who removes a mountain begins by carrying away small stones.

Chinese proverb



Members since September/October 2010 *LifeLine* . . . Welcome and Farewell

Welcome to these new members:

California

Carlsbad by the Sea

LTC James Bush, Ret. USA

Marie Gronquist

Harriet Shoupe

Harry Willis

Colorado

Frasier Meadows

Samuel Hays

Upgrade to LIFE

Connecticut

Edgehill

Virginia & Richard Petree

Elim Park Baptist Home

Frank Miner

Seabury Retirement Community

Joseph H. Walton

StoneRidge

Malcolm & Dorothy Wheeler

District of Columbia

Ingleside at Rock Creek

Joan Fiske Adams, PhD, LIFE

Julia J. Young

Florida

Estates at Carpenters

G.O. & Virginia Miley

Massachusetts

Newbury Court

Charles Harrington

New York

Canterbury Woods

Dr. Maria Bardos

Nelly Bradley

Adele Haas

Kirsten Milbrath

Upgrade to LIFE

Len Sikora

Upgrade to LIFE

Fox Run

Irine Zinter

North Carolina

Belle Meade

William & Lillian Birk

Deerfield

Judy Boone & Richard Besley

Topping Bryan

Alice Krutulis

Marketing Department

Galloway Ridge

Ruth Katz

Pennsylvania

Foxdale Village

Julia Hix,

Upgrade to LIFE

Jose Ward

Virginia

Westminster at Lake Ridge

Evelyn Sorenson

Florence Swenson

Washington

Mirabella

Thomas D. O'Brien

West Virginia

Daphne Schreiber

We extend sympathy to the families and friends of these members who died recently:

Florida

Estates at Carpenters

Harold Buell

Rodney Colson (LIFE)

Pennsylvania

Foxdale

Jane Masden

We ask all readers to report to us changes in member addresses and also to report the names of those who have died.

Update on Life Memberships

We are pleased to report there are now 116 living LIFE members who live in 15 different states and the District of Columbia. We began preparation of this issue with a tie at 17 each between Ingleside at Rock Creek (DC) and Estates at Carpenters (FL). However, Ingleside added one November first bringing their total to 18 and Carpenters lost long time resident Rodney Colson, so now has 16 living Life Members.

Letters to the Editor (continued from page 2)

Alternative Elder. In September I gave the keynote address at a Georgia Think Tank on Designing for Elders. I brought back some good ideas on building with sustainability. So I've been consulting with residents who are members of the Uplands' Long Range Planning Committee.

Thank you for the hours you spend editing the NaCCRA *LifeLine*. I've read the last issue that just arrived today. It has persuaded me to send in my membership application.

Jane Heald, Uplands Retirement Village, Pleasant Hill TN
jheald@fontiernet.net

ED: Jane received national recognition from the national United Church of Christ for her leadership in bringing the Eden Alternative Model to Uplands that is the first in the state of Tennessee to be approved to build a nursing home based on the Eden Alternative Household Model. She subsequently received a gift membership to NaCCRA. We are pleased to have this pioneer among our membership.



Executive Director Report, Fall Meeting 2010

NaCCRA is still healthy and serving its membership. Accomplishments of the past year are:

1. Jack Mathison continues to provide excellent leadership that results in continued membership growth.
2. Marleen Varner continues to produce outstanding *LifeLines* that contribute to membership growth.
3. Julia Hix stays abreast of political happenings and provides excellent reports.
4. The GAO report was favorable to residents thanks to the input of the NaCCRA Board.
5. The Senate Committee on Aging report was favorable for residents and provided excellent guideline for State Regulations and CCRC polices. Again, thanks to NaCCRA Board input.
6. Beth High and her nominations committee continue to identify and nominate outstanding candidates that provide excellent leadership and service for NaCCRA membership.
7. Your Executive Director was reappointed to the AAHSA House of Delegates for another three-year term.
8. Your executive Director was appointed as a member of Florida Governor's Continuing Care Advisory Committee.
9. Your executive director completed his work as a resource member of the GAO committee.
10. Community membership continues to grow and is at an all time high. Community membership is an excellent method of reaching large number of residents. It may be time to consider providing a \$1 rebate per member to State and Community members with at least 25 individual members. A \$2 increase in individual membership dues would support this rebate.
11. Individual membership is at an all time high.
12. David Coburn continues to provide excellent service as NaCCRA membership manager at a reasonable cost.

Charles D Paulk, Executive Director

State Reports

Florida Report For NaCCRA Meeting, Fall 2010

The Florida Life Care Residents Association continues to be a proud member of the National Continuing Care Residents Association and appreciates the efforts of the

organization to advocate for residents at the federal level. Florida's CCRC residents have a clear understanding of the significant purpose that NaCCRA serves.

Demographics and Governance

FLiCRA has just over 11,000 residents as members. These residents live in 59 continuing care retirement communities in Florida. Some communities have close to 100% of their residents as members. FLiCRA is struggling with attrition as many members have been members for 15 years or more and are aging in place and we are not able to recruit enough new members to offset attrition. Occupancy rates at Florida CCRC's are the lowest they have been since the late 1980's. The statewide occupancy rate is 84%.

Additions to Florida Law on Continuing Care Retirement Communities

On July 1, 2010, new elements to Florida Statutes 651 become law based on a joint legislative proposal from the Florida Life Care Residents Association, the Florida Association of Homes and Services for the Aging and the Florida Office of Insurance Regulation. Features include:

- Adds wait list contracts to the list of contract forms that must be approved by OIR if a provider uses them.
- Adds "statement of income and expenses" to the information that must be submitted by continuing care communities to the Office of Insurance Regulation as part of the annual report. This becomes public record and is accessible to residents.
- Specifies that if financial terms in s. 651.026 change based on revisions to generally accepted accounting principles, the new terminology will be required in the annual report, opinion, and schedules.
- Deletes obsolete language related to a phase-in of reserve requirements and renumbers subsequent subsections as requested by OIR.
- Clarifies that if a prospective resident signs a contract but delays moving into the community, he or she is considered to have occupied a unit in the facility when he or she pays an entrance fee, or any portion thereof, and has begun paying a monthly fee. The proposed language also reiterates that such resident has 7-days from the date of signing the contract to cancel without financial penalty. (Some people enter into a contract and pay fees strictly for insurance purposes. They don't move in until they need services. Current law does not address this situation, which was not anticipated in previous re-writes of Ch. 651.)
- Changes "residents' organization" to "residents' council" to conform to terminology used in continuing care communities.
- Requires the provider to give a copy of Ch.651 and related rules to the newly elected chair of the resident council within 30 days of the new leader's election.
- Gives residents the right to receive memos and announcements from the residents' council as well as

unrestricted access to the council.

- Requires providers to give the president of the residents' council at the quarterly meeting a written summary explaining increases in monthly fees that exceed the CPI. Previous law did not require such summary be in writing.

- Specifies that a management company is an agent of the provider when it comes to disclosing information to residents as required by law.

- Expands the list of items that must be provided to the president or chair of the residents' council to include a summary of entrance fees collected and refunds made for the period covered in the annual report, a copy of the annual statement, a copy of the quarterly annual statement if one is required, and a copy of newly approved continuing care contracts when requested.

- Requires the provider to give prospective residents a copy of 651.071 (the section of law dealing with preferred claims during liquidation or receivership) before entering into a contract.

- Changes "secretary" of Governor's Continuing Care Advisory Council to "vice chair" to conform to current practice. Requires the council chair to report the council's findings and recommendations annually to the Executive Office of the Governor and the Commissioner's Office.

- Identifies information that must be presented to the council at its annual meeting consistent with current practice, but adds a summary and status of complaints related to this chapter made to the Division of Consumer Services (Dept. of Financial Services). In addition, requires OIR to notify council members of rule workshops and hearings.

2011 Legislative Session

Florida is working on developing legislation for the spring of 2011 to put forth formal regulations that would allow "CCRC Without Walls". Two communities have already been approved to sell such contracts based on a case-by-case approval from the Commissioner of Insurance.

If you would like more information on FLICRA, please visit our website at www.flicra.com.

FLICRA, 325 John Knox Road, L103, Tallahassee, FL 32303, 850/906-9314 Ph.

North Carolina Fall Meeting Report, 2010

1. In North Carolina we now have 55 CCRCs.
2. Of the 55 CCRCs 35 have resident members on their boards.
3. Annual budget \$125,000.00 with the major part dedicated to education, communication and advocating.
4. Marketing for our area runs about 91% and is about the same as last year.

5. On advocacy we plan to work with NCANPHA, the Coalition of Aging and other organizations concerned with senior issues.

6. On membership for NcCCRA we have a total of 56 members and for CCCR we a total of 3,976.

*Clinton H. Willis, President
CCCR of NC*

Pennsylvania Fall Meeting Report, 2010

The Pennsylvania branch of NaCCRA has been concentrating on three basic efforts these past few months.

First we have been working on the computerization of our membership records and attempting to move from a paper internal informational system (minutes, agendas, notices) to a computer driven means of communication. We expect this change to result in great savings of time, paper and mailing costs.

Second, we have continued to emphasize good, meaningful programs. Our most recent was a presentation on aging by Dr. George Simms of the Hershey Medical Center. He explained that as seniors, we have three tasks to accomplish if we are to have enriched lives. They are: Understanding and accepting our losses – these losses were defined as biological, physical, psychological, social and spiritual; Developing a positive attitude, this opens opportunities for greater activity and involvement and finally; Recognizing that by sharing your time and talent you continue to grow and live enriched lives. Our third effort was being active politically, we, PARCR members are advocates for legislation that affect the elderly.

We have established a network of members who keep our legislators aware of our position related to how legislation impacts our lives. It is working well.

*George A. Tjiattas, President
PARCR*

Virginia Fall Meeting Report, 2010

President's Report, VaCCRA Annual Members Meeting, 15 October 2010

Well folks, it's been an interesting and challenging two years. And it's ironic that my presidency of VaCCRA should end as it began. When elected to this position on 7 November 2008, I was burning with fever that within a day or two had escalated into bronchitis. As I stand here today, you can hardly hear me without mega power on this microphone for again I am battling this disease that strikes with little warning and lays me low for weeks on end, sometimes developing into bronchial pneumonia. I just hope that your new president will be blessed with good

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Virginia Fall Meeting Report *(continued from page 9)*

health; you deserve someone who can give VaCCRA his full attention.

Still, and having said all this, during 2009 and 2010, VaCCRA has made some strides, albeit short ones. Our Annual and Spring Members Meetings have grown from just meetings with speaker after speaker to one-day conferences with purpose-stated themes supported by speakers and workshops. There have been sizable distributions of literature appropriate to the themes. And, except for today when many people cancelled because of illness, attendance has steadily grown from about forty to upwards of 100 attendees. We have been feeling positive about ourselves as an organization dedicated to educating our members and others about the CCRC concept while advocating on behalf of, not only our members, but also all CCRC residents in the Commonwealth of Virginia.

2009 was, for the most part, spent re-organizing VaCCRA from the ground up. We developed a Handbook so that the Board of Directors does not need to continually reinvent itself. Handbooks now serve as repositories for contact information for Officers and Directors, lists of Associate and Community memberships, Bylaws, History, Support Organizations, helpful program aids such as Banners, Forms and Maps, and sets of Job Descriptions and Policies and Procedures – in short, the essentials for operating VaCCRA. During the year one additional community joined VaCCRA bringing with it some 30 Associate members.

Unfortunately, we also lost one Community membership in 2010 so the number of Community members is still five. However, I learned today that a much wooded community in Williamsburg has taken membership beginning in 2011 and that will bring the number to six out of a possible fifty CCRCs operating in the Commonwealth.

During both years we have held the requisite number of Board meetings and a few extras; the Executive Committee has met several times, especially shortly after the Annual Members Meeting to plan recommendations to the Board for the coming year. A budget was developed during 2009 relying on dues as anticipated income and a draw on reserve funds. It was approved for that year and 2010; we missed it by a long shot both times but the extra was spent on good programming. We also wrote a growth statement in 2009 and carried it into 2010. Try as we may, we have had little success in growing VaCCRA principally, I think, because there is no Vice President for Promotion (Membership) and no actual plan for reaching non-member CCRCs in the Commonwealth. This year, we have invited non-member communities located in the same general area as the Community Member hosting the Spring or Annual meeting and this has attracted a few visitors but no new memberships. For this meeting, three communities were invited to each send two residents as VaCCRA's guests; one person accepted.

In 2010 we did, for the first time in VaCCRA's eight-year history, have an audit of the books. While not disparaging

any early treasurer, who served willingly but without prior experience, VaCCRA now has a retired banker in that office who has incorporated suggestions from the auditor as well as some of her own procedures. At the Spring 2009 Members Meeting a decision was taken to no longer seek 501(c)(3) or 501(c)(4) status but has left the possibility open for future action. VaCCRA continues, however, to consider itself a nonprofit organization and has been so favored by supportive business and other interested parties. To keep VaCCRA before the membership, co-editors of VaCCRA News took office in 2010. Our web site continues to attract occasional viewers. Over the two-year period, VaCCRA Directors distributed nearly 3,000 brochures and placed VaCCRA business cards in the hands of politicians and prospective members at every opportunity.

Also in 2010, a third Chapter was formed at Goodwin House Bailey's Crossroads. They, along with the Westminster at Lake Ridge Chapter, have been active throughout the year and are growing. There was an unsuccessful effort to revitalize the failed Chapter at Greenspring Village but their Resident Council has now appointed two Directors who are new to VaCCRA and are attending this meeting with hope in their hearts.

Although VaCCRA sought legislative up-dates during 2009, there was little of importance to seniors in the Virginia Legislature. Things changed in 2010 with the introduction of HB117 and SJR52. Both bills were introduced at the request of residents of VaCCRA Community Members and both were remanded for one year, to be reintroduced at the 2011 session. The former would, if passed, mandate that 20% of the governing boards of continuing care retirement communities be residents, chosen by residents, and having voting rights. As it stands, the bill has little chance of passing. The second bill would require a study by the state Corporation Commission to evaluate governance of CCRCs and determine whether, among other things, residents should be included on governing boards and, if so, what their roles should be. This bill seems to be gutless and will probably die from lack of interest. The VaCCRA Board of Directors did, however, write a brief 'Position Statement' favoring residents on CCRC boards of directors; this was accompanied by a justifying paragraph. In a majority vote the Board sponsored 'Statement' was accepted by the Annual Members Meeting. There is a plan to forward copies of VaCCRA's 'Statement' to state legislators. However, that and any other actions concerning HB117 and SJR52 will fall into the hands of my successor. At this time, we can do little except keep the issues before our membership until the Commonwealth Legislature convenes in January.

Well, you have allowed me to rattle on for quite a while but before I sit down I want to say one more thing. That is, thank you for the confidence you placed in me two years ago and for the privilege of serving the CCRC residents of Virginia as VaCCRA president.

*Barbara G. Trezona, President
VaCCRA*

News from State of Washington

Fifty Residents from a dozen CCRCs Participated in Aging Services of WA Resident Forum at Exeter House, Seattle (WA) Nov 11th.

Nancy J. Schauer, CPA, MS TAX, a partner in Moss Adams, introduced the topic "Ways to Fulfill Your Charitable Mission" before a dining room filled with 60 persons from a dozen CCRCs. Pictured is Nancy with ASW Resident Forum Chairman, Rev. Dr. Bob Nicholson and Della Lium, Resident leader at Exeter House and recently on the Board of Presbyterian Retirement Communities NW.

After refreshments, music at 9:30 a.m. and the welcome by Exeter Director Jeff Crandall, and Nancy's presentation, all sat around tables and shared stories of how their residents are involved in community service projects. Tours were given at 11:15 a.m. of the now being renovated historic Exeter House. The group welcomed R. Gerard Hyland from Mary's Woods at Marylhurst, Lake Oswego, Oregon.



Nominating Committee Report

As election of the officers for NaCCRA are officially held at the Annual Meeting in the Spring, this is an interim election to fill vacancies. The full election will take place at the Spring meeting. Other officers and the Executive Director stay the same until the Spring meeting. We have two nominees to present.

As the Nominating Committee was unable to find a candidate to serve as president for the 2010-11 term in April, Jack Mathison graciously agreed to continue until a replacement could be found. We are pleased to report that we have found a very qualified candidate. We wish to present Ruth H. Walsh of StoneRidge in Mystic, Connecticut, today for the position of President-elect. She will serve in that

capacity until after the Spring meeting when she will take over as President.

Kermit Scheele, who has served as treasurer since April 2009, has asked us to find a replacement for him now as he has other obligations that prevent him from continuing to serve NACCRA. We present an excellent candidate, Joseph H. Walton of Seabury Retirement Community in Bloomfield, Connecticut, to fill this position. His duties start at the end of this meeting today. Mr. Walton has also agreed to continue on next year.

Respectfully submitted,

*Beth High, chair Westminster at Lake Ridge,
Lake Ridge, VA*

*Duane Smith Patriots Colony, Williamsburg, VA
Page Hawk Ingleside at Rock Creek, Washington, DC*

RESOLUTION

Whereas Susan Weiss, Senior Vice President for Advocacy for the American Association of Homes and Services for the Aging (AAHSA), has provided outstanding service to NaCCRA in her regular presentations at our meetings,

Whereas she has always made room in her relentlessly busy schedule to attend our NaCCRA meetings held in conjunction with AAHSA and faithfully our annual meetings as well,

Whereas no resident question receives any but a complete and helpful reply from her at all times,

Whereas she is not only a LIFE member of NaCCRA, but recruits her colleagues to our membership as well,

Whereas her upcoming retirement is well deserved, but leaves a great gap in our special resources,

Thereby be it hereby resolved that NaCCRA Board, its officers and members do hereby express their deepest and most sincere gratitude for all her years to service to us and to the elder care field and send with her our very best wishes for a long and happy retirement. And we further hope that she will visit our meetings whenever she can.

Passed at the NaCCRA meeting in Los Angeles, Sunday, October 31, 2010.

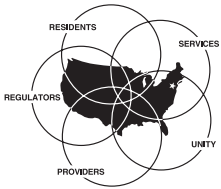
Marleen Varner, Editor
National Continuing Care Residents Association
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 Asheville, NC 28803



Please feel free to share your copy with a fellow resident or your administrators. Your comments, suggestions and article submissions are invited.

NATIONAL CONTINUING CARE RESIDENTS ASSOCIATION

a 501(c)(3) Corporation



NaCCRA Membership Application

NACCRA Thanks You for your support • By Working Together We Can Succeed

Date _____

Name of Individual: 1st Person _____

2nd Person _____

Address _____

Telephone _____

Email _____

Name of Community Resident's Association _____

- ANNUAL DUES PER (EACH) INDIVIDUAL.. \$ 15.00**
- LIFETIME INDIVIDUAL MEMBERSHIP \$ 150.00**
- Annual Dues per Community Association..... **\$ 150.00**
- Annual Dues per State Association..... **\$ 400.00**
- Tax-exempt Contribution \$ _____
- Total Enclosed..... \$ _____**

Please make your checks to: NaCCRA
 and return this notice with your check to:
 Coburn Administrative Services
 4727 Deter Road, Lakeland, FL 33813
Your Check is your receipt.