



The ORANJ TREE

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PRESIDENT'S REPORT

by Dan Hartley



I hope to see you on October 20, when we will be holding our semiannual meeting at Harrogate in Lakewood, NJ. Look at the article on page 4 for our speakers.

It should be a very interesting event.

Meanwhile, ORANJ continues to push ahead on matters that it does best, i.e. encouraging the exchange of information between CCRCs via active key committees and via our research efforts on topics of interest to our members.

As an example, our legislative committee is currently encouraging the legislature to pass a bill to give veterans and their survivors who live in CCRCs a property tax rebate.

We earlier announced the start of several surveys. The follow-up on resident board members who were mandated with passage of P.L. 1986 c. 103 in 2007 has been completed. A full version of the final report can be found on our website at oranjccrc.org, and a summary of the report's highlights can be found on page 2.

In addition, the surveys on transparency in CCRC administration and on transportation programs for residents of CCRCs are nearing completion.

The important thing about these surveys is that significant information has emerged. For instance, in the study on resident board members we have found that the CCRCs with older, more established programs and procedures have more effective communication between residents serving on boards and other board members.

The results of the transparency study show that most of the CCRCs have at least some committees containing both residents and management. That's an ideal situation. Also, some CCRCs involve residents already in early stages of the budget building process. The transportation survey notes the wide range of services offered. Some CCRCs provide transportation to a large variety of destinations.

As is plain from the foregoing, ORANJ continues to forge ahead with its efforts to improve the quality of life for residents in CCRCs. Our organization is very grateful for the contribution of new and old members as it continues its efforts to provide information that is of value to residents and to management.

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Hackettstown

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Meadow Lakes, Hightstown

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Monroe Village, Monroe Township

Navesink Harbor, Red Bank

The Pines at Whiting, Whiting

Seabrook, Tinton Falls

Stonebridge at Montgomery,

Skillman

Wiley Mission, Marlton

Winchester Gardens, Maplewood

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In January 2002, Ellen came to Winchester Gardens from central Illinois, where she had lived for the previous 50 years. She was persuaded to make the move by two sons who live nearby, as do six of her eight grandchildren.

During her years in Illinois, Ellen had a “checkered career” including medical care evaluation studies, clinical social work in hospitals, robotic education programs, and finally, Director of Alumni Programs and Development for the School of Chemical Sciences at the University of Illinois.

At Winchester, Ellen was appointed editor of the *Chronicle*, the community newsletter, within a month of arrival, and remained there until the spring of 2010. She also served on the Finance Committee and provided tutoring services for the Literacy Volunteers of America.

She was introduced to ORANJ at a plenary meeting in 2005 and was soon appointed Chair of the Communications Committee. In 2009, after resignation of the editor, she became editor of the ORANJ TREE as well.

DISCLOSURE AND TRANSPARENCY

While the report on transparency in ORANJ CCRCs is being prepared, it may be of interest to study the appropriate section of the “Suggested Best Practices” prepared and recently released by the American Association of Homes and Services for the Aging (AAHSA).

Disclosure best practices can provide reassurance to residents that the community they have chosen is financially strong and able to meet its commitments and obligations to the residents. CCRC strategies for disclosure of financial information to existing residents emphasize frequent, open, clear, credible, and honest communication with residents and may be evidenced through these types of practices:

A. Resident Access to CCRC Management

Residents of a CCRC should have appropriate ongoing access to CCRC management, such as:

- Regularly scheduled meetings in which management engages in active listening, responds to questions from residents, and provides reports on the community’s financial health and its plans for the future;
- Policies and practices that encourage informal, ongoing dialogue with residents and a visible and accessible management presence;
- Regular community-related communications, including newsletters and an up-to-date CCRC website;
- Strategies that allow residents to address concerns to management on an individual basis.

B. Resident Access to CCRC Financial Information

- Resident access to:
 - Audited financial statements;
 - Summaries of actuarial information, if applicable;
 - Annual operating performance reports;
 - Annual reports;
 - Updates about the community’s plans and performance and, in a system, the plans and performance of the system;
- Routine financial updates addressed to resident councils or finance committees by the director of finance;
- Summary information about the community’s financial and operating performance;
- Ongoing information and resident input in the budget process, including the determination of monthly fee increases

C. Resident Access to the CCRC Board/Ownership

Residents of a CCRC may be provided periodic opportunities to meet the CCRC board or owners. The CCRC should have a methodology for resident participation in or representation to the governing body or owners regarding decisions that affect the community.

HIGHLIGHTS OF RESIDENT BOARD MEMBER STUDY

In the spring of 2010, the Organization of Residents Associations of New Jersey (ORANJ) sponsored a study to follow up on NJ P.L. 1986 c. 103, which took effect in 2008 and mandated as one of its provisions:

“The board of directors, or other governing body of a facility, shall include at least one resident as a full voting member of the board or body. Resident members shall be nominated by the elected representatives of the residents and selected by the board of directors or other governing body.”

Each of the 24 continuing care retirement communities (CCRCs) in the area covered by ORANJ was asked to identify the resident(s) who were or had been serving on the board or governing body. Each community provided at least some information.

The results showed that 22 of the 24 communities in ORANJ have at least one resident board member. Two communities do not and one of these has asked to be exempted from the mandate.

In keeping with the legislation, these resident board members had been nominated by the residents and appointed by the boards of trustees.

All respondents were voting members and all reported having brought at least some items to the board’s attention.

Many reported communicating with the residents on the board’s behalf.

Most programs in the communities that had established resident board member programs *before* passage of the law, the “Experienced communities”

differed in important respects from those that had established such programs *after* the law took effect, the “New Communities.”

The boards of trustees on which resident board members served in the Experienced Communities tended to have true executive powers in establishing budgets and evaluating management, whereas boards on which resident board members served in the New Communities were more likely to be discussion forums without executive powers.

The boards of trustees in the Experienced Communities tended to have more clearly defined committee structures than the boards of the New Communities.

Resident board members in the Experienced Communities tended to have more effective working relationships with their boards of trustees than did those in the New Communities.

Several resident board members in the Experienced Communities emphasized that it required considerable patience, time and effort to develop effective working relationships with both management and their boards. Some of these CCRCs have had residents on boards for up to nine years.

Some respondents from the New Communities recognized that their programs had not yet achieved their full potential and described their programs as “evolving.”

Several respondents hoped that ORANJ would provide further guidance to help their communities to develop effective resident board member programs.

Awards for ORANJ Personnel

The NJ Association of Homes and Services for the Aged (NJAHSA) has created an awards program (resident of the year) to recognize a resident of a senior housing or health care facility who has made a significant contribution through charitable work, volunteer efforts, and other personal endeavors. Each year nominations are requested and selections made. NJAHSA has selected two ORANJ residents

to receive accolades as Resident of the Year. One is Maggie Heineman from Medford Leas, who works on *The ORANJ Tree* and the ORANJ web site (see the last issue for more on her), and the other is Helena Williams, who manages the store at Fellowship Village. These women will be recognized at ORANJ’s fall annual meeting on October 20 by Michele Guhl, President and CEO of NJAHSA.

ORANJ SEMIANNUAL MEETING

October 20, 2010, 10 AM – Harrogate CCRC in Lakewood, NJ

We are expecting two excellent speakers. In the morning, Michele Guhl, President and CEO of the New Jersey Association of Homes and Services for the Aging (NJAHSA), will speak about her organization and its programs and how her organization's objectives correspond with those of ORANJ. NJAHSA is a trade organization representing providers of these services, whereas ORANJ represents the interests of the recipients, or residents in the case of CCRCs. Prior to her present position, Michele had many years of service with the NJ Department of Human Services, where she was Chief Executive Officer for NJ's largest department and public agency, administering the state's public health and welfare programs. You will also be interested to know that Michele has been a member of the Women's Political Caucus of NJ and that she received an Alumni/ae Achievement Award and an Honorary Doctorate from Drew University.

In the afternoon we will hear from Senator Robert W. Singer, who represents the 30th District in the NJ State Legislature, which includes parts of Ocean, Monmouth, Burlington, and Mercer Counties. He is serving his 23rd year in the Legislature, three terms in the State Assembly where he was Majority Whip from '92 to '93 and currently serves as Republican Conference Leader. Of special interest to us, he is senior ranking member of the Senate Health, Human Services and Senior Citizens Committee, where he deals with legislation that affects CCRCs throughout the state. In his well-received prior message to ORANJ, Senator Singer pointed out the many ways that residents such as us can affect legislative outcomes. We hope that he will expand on his prior comments and bring us up to date

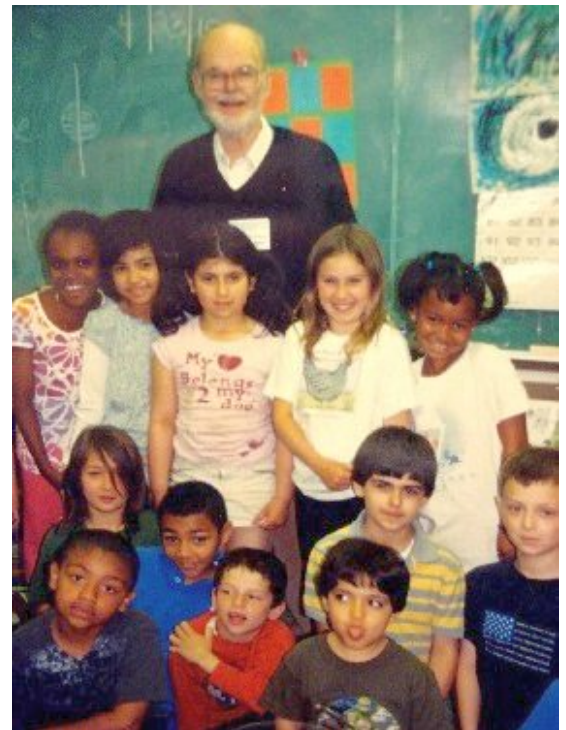
Stonebridge CCRC Participates in Intergenerational Program

Last spring, a number of residents took part in a multi-faceted learning program that engaged pupils at each grade level of a Princeton elementary school by sharing aspects of the elders' historical perspectives on communication, transportation, and other aspects of culture.

Kindergartners were filmed reading with their "grand pals," and created original music and a sculpture of a tree for a performance of the "Tree Song" by Ken Medema. First graders learned about old-time games such as paper airplanes, jump rope and cat's cradle. Second graders learned about early forms of transportation with hand-sewn dugout canoes and model sailboats as examples. Third graders made poems and stories about treasured objects in their elders' lives. Fourth graders, as part of their African-American history program, interviewed a resident and educator who has lived all her life in Princeton, about her experience as an African-American living in Princeton in the latter part of the 20th century. Fifth graders worked in groups along with elders to create multiple voice poems on topics selected by each intergenerational group.

Finally, the Stonebridge Singers performed in front of the whole school and then jointly with the Riverside School Chorus. The performance was so successful that the principal vowed to keep the Intergenerational Chorus going throughout the upcoming school year. The next step will be a visit to the CCRC by the Riverside School singers, planned for the fall.

The Springpoint Foundation provided transportation for the Stonebridge Singers. Even the bus driver became involved and shared his story with the children. According to a report on the project, "everyone came away with a sense of accomplishment and an appreciation for the value of multiple generations working together."



Herb Hobler, Stonebridge resident, with children who participated in the intergenerational program