

**ORANJ SOUTHWEST DISTRICT**  
**The Evergreens**  
**Thursday, March 3 1:30 pm**  
**Barbara Trought, VP SW District, Chair**

Attendance:

- Cadbury of Cherry Hill - Bruce Zollers, Patrick Kennedy
- The Evergreens - Roger Graham, Patti Rogers, Barry Platt, Louise Dow, Joan Douglass.
- Friends Village - Loretta Murphy, Bill Mackin
- Lions Gate - Jackie Levitt, Judy Franken
- Medford Leas - Barbara Trought, Maggie Heineman
- The Fountains at Cedar Parke - Dorothy Lanier
- Wiley Mission - Paul Basham
- Ron Whalin - ORANJ President

The meeting began with a sharing of information.

- Lions Gate is currently undergoing extensive remodeling in hopes that the redo will attract new younger residents.
- Cadbury of Cherry Hill is in the process of being sold to a for-profit company. This will be finalized around May 15. "Premier Cadbury Services" will be affiliated with Deer Meadows [deer-meadows.org/](http://deer-meadows.org/) which was formerly the Baptist Home of Philadelphia. Bruce has met with, and likes, the CEO of Deer Meadows, Lisa Sofia, (see [deer-meadows.org/executive-management/](http://deer-meadows.org/executive-management/) ) who will spend half her time at Cadbury and the other half at Deer Meadow. There will be a fulltime Executive Director at Cadbury. There is no difference in the resident contracts. The staff at Cadbury will keep their jobs for a trial period.
- At Friends Village remodeling has provided 8 more Assisted Living Units which have connecting doors that make it possible to have suites for couples.
- At Evergreens there are now acting classes so that residents can provide shows. Also new hair stylists and a fabulous chef.

A discussion about the visibility and availability of the CEO revealed a wide variety of management styles. Walkaround with spontaneous conversations with residents, meetings with individual residents by appointment, formal informational meetings to a large group monthly or infrequently, informal meetings with smaller groups (the same 40 or so people at Evergreens, rotating by geographic clusters at Medford Leas). The bottom line here was that at some CCRCs residents are happy with the availability of interaction with the CEO and at others CCRCs residents are dissatisfied with this.

There was some discussion about the implementation of the law requiring interaction with the board of trustees [http://www.njleg.state.nj.us/2006/Bills/PL07/192\\_.HTM](http://www.njleg.state.nj.us/2006/Bills/PL07/192_.HTM) At Medford Leas the requirement for quarterly meetings is met by having some trustees attend a

council meeting twice a year, and some trustees attend a meeting twice a year to which all residents are invited. Roger told the group that although Doug Halverson, CEO of the Evergreens had testified against enactment of this law, once it was passed there was an appointment of a resident to the Board of Trustees. The Evergreens also have appointed a trustee to the Board who is active in the Moorestown community. The second part of this law, requiring an Advisory Council, has never been implemented.

The agenda which Barbara had sent out prior to this meeting included a copy of the mini-survey on Satisfaction Surveys which Ron had sent to residents on February 23. The survey asked whether the CCRC had satisfaction surveys, and if so which company did the survey for the community. Some CCRCs have returned the surveys and others were reminded to do so.

Barbara handed out copies of the Staff Appreciation so that there could be a discussion of the “unresolved issues.” (The survey was reported in the January issue of The ORANJ Tree [oranjccrc.org/ORANJ/wp-content/uploads/2016/01/2016WinterORANJtree.pdf](http://oranjccrc.org/ORANJ/wp-content/uploads/2016/01/2016WinterORANJtree.pdf) and is archived in the research section at [oranjccrc.org/ResearchSurveys/2015/2015StaffApprciationSurvey.pdf](http://oranjccrc.org/ResearchSurveys/2015/2015StaffApprciationSurvey.pdf).)

“UNRESOLVED ISSUES Staff Appreciation programs will continue to limp along from year to year because of a lack of clarity about basic issues. Are annual gifts to staff another name for tips, as some at the IRS imply or are they analogous to donations or gifts such as we give to friends and family? A related issue is that the IRS does not recognize the relationship between residents and staff and frequently reverts to the employer. Reverting to the employer/employee analogue has important tax implications. For CCRCs the no-tipping policy is advantageous to management because it keeps service uniform instead of giving extra to those in contact with big tipppers and very little to others.”

At some CCRCs the appreciation gifts are given to staff by the residents - by check or in cash. In this case the residents are told by administration the years of service so they know how much to disperse to each staff receiving a gift. At other CCRCs gifts are channeled to the staff through the administration. In one case it is known that the admin deducts taxes and social security contributions. It was not clear whether other CCRCs do that or not.

Barbara handed out copies of the January 22 meeting of the Legislative Committee and asked if anyone was aware of the Yellow Dot program. No one was. Maggie said that the Yellow Dot program was for emergency personnel in a traffic accident and that Yellow Dot is explained in the next issue of *ORANJ Tree* and at the plenary session with the hope that residents would advocate for the Yellow Dot program in their municipality.

Maggie also noted that some of the info in the legislative committee report is at this time confidential. She said that an issue for the Executive Committee is making the work of the Executive Committee better known appropriately. One approach is to make the private EC section of the site available to ORANJ presidents. Another approach is the use of the newly established ORANJ Blog - putting current, appropriate, info on the blog and establishing a system for people to subscribe to the blog, thus receiving email notifications of blog posts. [oranjccrc.org/blog/](http://oranjccrc.org/blog/)