



The Resident CONNECTION

3rd Quarter 2022



President's Message

Over the years, FLiCRA (Florida Life Care Residents Association) has worked successfully with the state legislature to provide, among other protections, a Sales Tax Exemption for those meals that are part of individually

selected meal plans which saves us hundreds of dollars a year.

We have twice defeated an attempt to tax nursing home beds in Continuing Care Retirement Communities (CCRCs). We have secured "Homestead Exemption equivalent" benefits for residents of for-profit and leased not-for-profit CCRCs. Among all of our other successes in protecting residents of CCRCs, is the development in Florida Statutes 651.083 of a "Bill of Rights" for residents of CCRCs.

While you may be aware of our successes, are you aware of the structure of our association and how you can play a role? If you are a current member of the organization, you are one of approximately 13,500 dues-paying members across the state.

Most members reside in the 54 CCRCs where we have FLiCRA members. In order to be a formal chapter, there need to be least 25 FLiCRA members and a local chapter board and local bylaws. Many of our chapters have full active boards with sub-committees to keep residents informed about legislative issues that may affect their well-being.

Our state of Florida is divided into eight FLiCRA regions. The FLiCRA chapters in each region elect a leader to be their region director. The director's

responsibility is to support the efforts of the local chapters to encourage membership and to educate the residents about current issues. Those directors also constitute the statewide board of directors. They, along with directors elected at-large by the total membership, set policy to govern the activities FLiCRA takes on to carry out our mission. That mission is to promote and protect the rights of residents who live in CCRCs. FLiCRA accomplishes its mission through its relationships with legislators and state agencies.

The folks who manage FLiCRA's day to day operations have an office in Tallahassee led by our Executive Director Bennett Napier, CAE.

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2022 FLiCRA Board Of Directors

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His company, Partners in Association Management, provides us with the support we need to manage members' dues, circulate information, and monitor proposed legislation that may require members' attention. In addition, the company provides us with the services of three registered lobbyists and an in-house attorney.

FLiCRA has been very successful, and it will continue to work to protect our interests. But, we are not finished yet.

You have seen the call for applicants to be nominated to serve at-large on our board of directors. That election will take place at our annual meeting in November.

One of our remaining challenges is to increase statewide membership. Our goal is to increase the number of chapters around the state and to increase the number of our members. There are 19 CCRC communities that do not yet have any FLiCRA members.

If you have access to the internet, please visit our website FLiCRA.com to learn more about the organization and membership. You will understand why it is important that every CCRC form a FLiCRA chapter, and that membership from its community will add voices and strength to FLiCRA's mission – to promote and protect the rights of residents who live in CCRCs.

For information about initiating a new FLiCRA chapter, please feel free to contact me, Diane Dalsimer, thedalsimers@gmail.com, or our Executive Director Bennett Napier, bennett@executiveoffice.org.

Diane Dalsimer, FLiCRA President

Important 2023 Legislative Session Dates

March 7, 2023

Regular Session convenes
12:00 p.m., deadline for filing bills for introduction

April 22, 2023

Motion to reconsider made and considered the same day
All bills are immediately certified

April 25, 2023

50th day - last day for regularly scheduled committee meetings

May 5, 2023

60th day - last day of Regular Session

Florida Resident Council Operations Survey Summary

Conducted by FLiCRA

55 of 71 licensed CCRCs participated in the survey

How many members are on your Resident Council?

5 - 9 members	44%
10 - 19 members	47%
20 - 30 members	1%
31 - 40 members	4%
Over 40 members	4%

How often does your Resident Council meet?

Quarterly	6%
Monthly	62%
Twice a month	5%
10 months/year	15%
9 months/year	8%
6 months/year	4%

How is the Resident Council President/Chair elected?

By all residents	20%
By the Resident Council	80%

Are agendas for Resident Council meetings released ahead of the meeting or distributed the day of the meeting?

Ahead of the meeting	60%
Day of the meeting	40%

Are all Resident Council meetings open to all residents?

Yes	60%
No	40%

Does the CCRC Executive Director or a representative of management regularly attend Resident Council meetings?

Yes	71%
No	29%

Does the Resident Council generally refer to Florida Statutes 651, the law governing Continuing Care Retirement Communities, to help guide its work?

Yes	55%
No	45%

Does the Resident Council appoint/elect a designated representative to represent residents before management as Florida law allows?

Yes	71%
No	29%

How does the Resident Council communicate its activities/work? (check all that apply)

In-house memos in mailboxes	66%
Email communication to residents	17%
Post meeting minutes in library or on bulletin boards	64%

What types of committees does the Resident Council establish? (check all that apply)

Budget and Finance	64%
Health Services	66%
Food Services	77%
Legislative/Government Affairs	33%
Fundraising	31%

Seniors Head Back to Retirement Communities as COVID Lingers

Retirement living adapts to new realities.

For some retirees, resilience comes with this new phase of life. They carry with them years of experience, professional accomplishments and just living life.

And for some, living near others like themselves gives them a sense of community, comfort, and security. For these people, even the pandemic hasn't stopped them from wanting to live near others while maintaining their privacy.

As the second year of the pandemic began, they forged ahead with their lives, plans they had, or a new plan they made during the months that stretched into years of isolation for some. Sometimes, it was a combination of circumstances that led them to move to some type of retirement or "senior" community.

Read: Forget pickleball and golf. These communities centered around farms or gardens are redefining retirement.

"I just didn't want to be alone," says Carol, who is in her mid-80s and preferred to use only her first name. After her husband died in May 2021, she began making specific plans to move to a nearby retirement community in Bethesda, Md. "I decided I wanted to move." Yet, she and her husband had discussed what they'd do. "We had decided together when one of us was alone they would sell the house."

She considered downsizing to a condominium building but thought: "Who am I going to talk to? Who am I going to have dinner with?"

A retired teacher and school administrator, Carol consulted with her three grown children, and considered a few places in the area, including Fox Hill Residences, a retirement community, where she ultimately moved in October 2021. "It's an apartment," she says. "It's like being in a condo building except it has all the amenities." Two of her

children live nearby, along with grandchildren. "You can be busy all day," she says. In addition to an indoor pool and gym, concerts, lectures, trips and an advanced walking club, Carol likes the on-site library and the fact that there are other people around. "You can always find someone to chat with."

Read: A retirement safe from climate change? Ask the tough questions about real estate and property insurance.

Like others who are drawn to the variety of communities available to retirees and others who continue working, Carol enjoys being around people. "I am a social being," she says. "I didn't really want to be isolated. But I can be if I want to" at Fox Hill Residences.

She did not move in during the "height of the pandemic," she says. Yet, since her arrival in October, she has never seen a staff member without a mask.

Also, "in common areas, residents wear a mask," she says. Of moving in last fall while the pandemic continued, she says, "I didn't really worry about it. By the time I moved in October, we thought things were easing up."

Indeed, the pandemic affected senior housing, and various kinds of housing felt the impact. "It's sort of like investing, you've got to weigh the risks."

Communities that include assisted living and memory care as well as independent living in some cases such as Belmont Village Senior Living, based in Houston, with 33 villages in operation in Texas, California, and South Florida, are thriving again. "What we've seen in 2022 is a tremendous surge in demand," says Patricia Will, its founder and CEO. In 2020, at the outset of the pandemic, "we closed our front doors," and did not take any new residents beginning April 1, 2020 and for several months thereafter "until we could get a grip on how to do this well on the inside," she says. "We did that on our own."

Because communities with assisted living and memory care that provide “care services” are licensed by each state, state regulators as well as local public health departments began to catch up with the situation and started to prohibit new residents and visitors “to protect those inside,” Will says. There was no precedent for the COVID-19 pandemic, she says.

Says Margaret Wylde, founder of the Mississippi-based ProMatura, a market research company for residential communities, “there was a dip in occupancy but we’re back to where we were prior to the pandemic. Occupancies are back. There was no lasting detriment to the industry. The better communities got on it immediately.”

Because there are so many different types of communities ranging from active adult communities (55-plus) and independent living to some combination or a continuing care retirement community (CCRC), known as a “life plan,” community in the industry, there are no precise figures on occupancy that covers all types.

Overall, “a lot of CCRCs are back to normal,” says Tripp Higgins, president of myLifeSite, an online resource that focuses on educating consumers about “life plan” communities. He describes the situation since the onset of the pandemic in March 2020: “During the heart of COVID people were not able to interact in the same way,” he says. “We were not able to bring people onto campus during the heart of COVID.” Marketing the “life plan” communities had to be done virtually, which was not as effective. “It was about protecting the community first and foremost. Everyone had to pivot. There wasn’t as much demand.”

For some, fear was a factor. “People were fearful,” Higgins says. “Uncertainty makes people not want to make a decision.”

Yet, some people did move forward such as to a retirement community with independent living. For example, according to Julie Sabag, director of sales and marketing at Fox Hill Residences, sales for 2022 so far include 18 settlements with three scheduled compared with 30 in 2021, 11 in 2020,

and 21 in 2019. The community has 240 condominiums of different sizes.

What’s driving the interest? “They’re moving there for a purpose,” Sabag says. “It’s an opportunity for friendship. “They are a little bit fearful (at first). It’s like re-entering the world again.” The majority of people who are moving in are (seeking) “that social opportunity.”

At active adult communities, typically designated as 55-plus housing, single-family homes are often the only type of housing available.

Jason King, general manager at Trilogy at Lake Frederick, in northern Virginia, said those seeking to flee densely-populated areas in and around cities, bought one-level, single-family detached homes. “In 2020, half of the homes were purchased as move-in ready homes,” King says. Demand was similarly high in 2021, “a record year,” though 2022 has not been “as hot as it was in 2021.”

He attributes that, in part, to low inventory. Five hundred homes have been completed in the community with 480 more to be built. Before COVID, it would take about six months from sale to move in, but with supply chain issues, it now takes 10 months from the sale of a home until move in, King says.

Source: (Morningstar) By Harriet Edleson
Seniors head back to retirement communities as COVID lingers—’I just didn’t want to be alone’

**WANT MORE
FLiCRA?**

**Go to FLiCRA.com and
sign up to receive FLiCRA
Alerts and Updates straight
to your email inbox!**

One Retirement Home to Another: Oak Hammock Residents Help Sponsor 4-Legged Neighbors

The Retirement Home for Horses at Mill Creek Farm in Alachua, FL, opened in 1983 after the owner, Mary Gregory, met her future husband and they bonded over their love for animals.

Now, at their Florida horse retirement farm, they are dedicated to providing a good life to horses that are too old to be worked or ridden.

It costs about \$3,000 a year for the upkeep of a single horse, but the residents of a continuing care retirement community, Oak Hammock at the University of Florida, are helping alleviate that cost by joining together and sponsoring their first horse, named George, for \$50 a month.

“This operation is completely done by volunteers,” said Oak Hammock resident Bill Rossi, describing Mill Creek Farm. “The lady that owns this place and her son have dedicated over 300 acres here to save animals. I think it is a place of beauty.”

The president of the retirement home for horses, Paul Gregory, said the partnership with Oak Hammock is beneficial for both mental and physical health.

“We really want this to be a learning experience for people out here,” he said. “An elderly horse, just as an elderly person, deserves to be respected and taken care of.”

Approximately 20 Oak Hammock residents went to tour the horse retirement farm after hearing about the program, and more are interested in going back when it’s a little cooler, according to Katherine Osman, director of community services at Oak Hammock. She anticipates it being an ongoing relationship, with roughly 50 residents attending the information session before the trip.

Osman said that to kick off the program, people from the Mill Creek came to speak about the organization and educate residents. A private tour of the 350-acre property was arranged following the meeting,

allowing residents to meet the horses and learn their back stories.

“Some of these horses have survived horrible abuse and neglect or worked in dangerous situations, so they all deserve a happy retirement,” Osman said. After the tour, residents pledged to sponsor one horse. Additionally, some Oak Hammock residents individually plan to donate and sponsor horses at the facility.

From one retirement community to another, there is no doubt that the friendships between Mill Creek Farm and Oak Hammock will only continue to grow. “I think when we focus on others, even four-legged others, it helps us realize how much small gestures can lead to a large impact,” Osman said.

Source: (mcknightsseniorliving.com)
One retirement home to another: Oak Hammock residents help sponsor 4-legged neighbors - In Focus - McKnight’s Senior Living

CCRC FINANCE GUIDEBOOK

FLiCRA chapters can purchase copies of the “CCRC Finances, A Guidebook for Members of CCRC Resident Finance Committees.”

The guidebook is intended to assist interested residents with achieving a basic understanding of their CCRC’s financial position and performance as reflected in its financial statements and other key documents.

Printed guidebooks are available for \$14.90 each and electronic copies are free. Orders can be placed by contacting the FLiCRA Office at (850) 906-9314 or by email at lauren@executiveoffice.org.

FLiCRA 2022 Annual Conference & Chapter Delegates Meeting November 3 • John Knox Village, Pompano Beach

Thursday, November 3, 2022

8:15 a.m. - 9:00 a.m.

Registration & Continental Breakfast

9:00 a.m. - 10:00 a.m.

CCRC Resident Engagement in Community Governance

*Katherine C. Pearson, Professor of Law,
Dickinson Law, Pennsylvania State University*

10:00 a.m. - 10:15 a.m.

Break

10:15 a.m. - 12:00 p.m.

Board, Membership & Chapter Delegates Meeting

12:00 p.m. - 12:20 p.m.

Break

12:20 p.m. - 1:30 p.m.

Membership Luncheon

Please call the FLiCRA Office at (850) 906-9314
if you require any special needs due to a
disability.

Location

John Knox Village, Pompano Beach

651 SW 6th Street

Pompano Beach, FL 33060

(954) 783-4000

**All meetings will be held at
John Knox Village, Pompano Beach**

Suggested Hotel Information for Lodging

There is no formal FLiCRA room block at a hotel.

Hampton Inn Ft. Lauderdale - Cypress Creek

720 E Cypress Creek Rd

Fort Lauderdale, FL 33334

Phone: (954) 776-7677

Current quoted room rate is \$196.00 single/double,
room rates are subject to change and based
on availability.

**Please mail/email all registration forms
by October 24, 2022 to:**

FLiCRA

325 John Knox Road, Ste L103

Tallahassee, FL 32303

Email: lauren@executiveoffice.org

FLiCRA 2022 Annual Conference & Chapter Delegates Meeting Registration Form

Please Duplicate for Multiple Registrants

\$48.00* per person (includes AM refreshments and lunch on Thursday)

\$18.00* per person (includes AM refreshments ONLY on Thursday - Does not include Lunch)

**Registration prices cover FLiCRA's actual cost, no markup has been added*

Name: _____

Community Name: _____

Address: _____

City/State/Zip: _____

Phone: _____ Email: _____

Total Amount Enclosed (Please make checks payable to FLiCRA): _____



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Guidelines for Establishing New FLiCRA Chapters

1. Share the benefits of FLiCRA's work with management. Refer to the information on the back of the membership brochure.
2. At a CCRC where you do not already have a contact, talk with the management and ask to be introduced to the president of the residents' council, if there is one.
3. Lacking a residents' council, ask for an introduction to active residents.
4. If you have a contact, particularly someone who is already a FLiCRA or NaCCRA (National Continuing Care Residents Association) member, ask for an introduction to the president of the residents' council, if there is one.
5. Identify a person or persons who are FLiCRA members or who want to get involved and encourage them to take the lead.
6. Identify resident leadership who can recruit membership and lead meetings.
7. Once contact has been made with active residents, share the FLiCRA mission and materials, and organize an orientation meeting for residents to attract interest in the organization.

Be Persistent: Letters and flyers do not do much to encourage people to step up. **KEEP TRYING!**

To download a copy of the Guidelines for Establishing New FLiCRA Chapters and a Sample Letter to the CEO of CCRC Community go to www.flicra.com/linksandresources, select Guidelines for Establishing New FLiCRA Chapters.