



# Massachusetts PATRIOT

Massachusetts Life Care Residents' Association (MLCRA) Winter 2016

The Residents' Advocate-Management's Friend

The President's Message:

## Updates on MLCRA Projects by Will Holton



Will Holton

After a break since its October meeting, the MLCRA Board met on January 25 to begin 2016 by setting realistic but important goals for the New Year. Internally, we plan to have two Area Meetings, continue to build the MLCRA membership, and do a survey of Massachusetts communities on a possible problem area. Externally, we will reestablish our good working relationships with the Massachusetts Executive Office of Elder Affairs (EOEA); the Legislature's Joint Committee for Elder Affairs and LeadingAge Massachusetts, the management organization for nonprofit retirement communities and other institutions. These goals are realistic if our talented members will step up and help with projects that interest them.

**Area Meetings** have been important in the past for fostering communication among MLCRA members and planning cooperative efforts. The plan is to have a combined Area 3 and Area 4 (Northeast and Southeast Massachusetts) meeting in March, 2016 at Brooksby Village in Peabody. MLCRA members from other areas will be welcome at this one-day meeting. Details will be coming out soon to association presidents and MLCRA representatives. We hope to have good attendance from all communities in the areas. Note that Lasell Village is closer to Area 3 and Area 4.

**The Massachusetts Executive Office of Elder Affairs (EOEA)** has a new Secretary, Alice Bonner, Ph.D., under the Baker administration. She holds an undergraduate degree from Cornell University, a nursing degree from Columbia University, a masters in gerontological nursing from the University of Lowell, and a Ph.D. in nursing from the University of Massachusetts, Worcester. Secretary Bonner was an associate professor of nursing at Northeastern University and previously she was director of the Division of Nursing Homes at the Centers for Medicare and Medicaid Services (CMS) in Baltimore. She has received several honors for exceptional work in her field, focusing on developing "models of care that promote optimal health, autonomy, and quality of life for older adults." (*cont'd on p. 2*)

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### Residents Associations Must Request Financial Information from Management

In 2013 MLCRA succeeded in passing important legislation that protects residents of retirement communities. Massachusetts General Laws c. 93, s. 76 requires Continuing Care Providers to submit specific contractual and other information to the Executive Office of Elder Affairs (EOEA). The same information must be provided by the management of each community when it is requested by the residents' association.

Now is a good time to request this information because the EOEA sent out letters to all providers, both for-profit and not-for-profit, in November, 2015, giving them 60 days to comply with the law. Some MLCRA members will (*cont'd on p. 2*)

**President's Message** (*cont'd from p. 1*)

A group from the MLCRA Board will meet with Secretary Bonner and key staff members at the EOEA, probably in February. We will thank Secretary Bonner for steps she has already taken to protect residents in our communities and to help to establish stronger working ties between MLCRA and the EOEA.

**The Commonwealth Legislature's Joint Committee on Elder Affairs**, including senators and representatives, has worked with MLCRA in the past on legislation. Recently I met with Victoria Halal, Senator Patricia Jehlen's specialist on elder affairs. She suggested that we meet first with the new secretary of the EOEA (see above). Ms. Halal also recommended that we meet soon with cochairs of the Joint Committee on Elder Affairs: Senator Patricia Jehlen and Representative Denise Garlick. Ms. Halal also suggested having a panel at our Annual Meeting in May with leaders from the EOEA, the Joint Committee, Consumer Affairs, and Health and Human Services.

**LeadingAge Massachusetts** represents not-for-profit providers of care for senior citizens, including those of us who live in Continuing Care Residential Communities (CCRCs) and similar retirement communities. MLCRA worked closely with LeadingAge Massachusetts on the legislation that passed in 2012. The president, Elissa Sherman, has been very helpful to MLCRA in the past, and she has offered to meet with our Board and other MLCRA members.

**Surveys of MLCRA member communities on important problem areas will be launched this year.** Your Board has decided that the focus of the first survey will be on the entrance fees collected from new Independent Living residents, how those entrance fees are used, and the policies for returning entrance fees at the communities in Massachusetts. **Please send me**

**suggestions for questions that would yield helpful information for your Residents' Associations.** I will prepare a draft questionnaire for the first survey and the Board members will conduct pretests in their communities.

***The February 2016 meeting of the MLCRA Board will be on February 29. All MLCRA members are welcome to attend.*** ●

**Financial Info** (*cont'd from p. 1*)

remember that in 2014 Board members reviewed most of the files at the EOEA office and found that they were not complete or up-to-date. The documents required from each community are: The Disclosure Statement, with details on the control of the community and the current financial conditions; The Contracts for Continuing Care; any available advertising or promotional materials; and copies of any building permits.

MLCRA Board Member Lauren Hale reminds us about the phrase "upon request" in the legislation. Much of the information covered under the law is available to residents "upon request" by the residents' associations that are given legal status by the legislation. Many of our communities have long traditions of good communication between management and residents, but the law is behind us if we need it. It is important that the associations make the requests. ●

**HOLD THE DATE!**

MLCRA Area Meeting  
for Area 3 and 4 Associations  
Wednesday, March 23, 2016  
Brooksby Village  
Peabody, MA  
Details to follow.