



**CADBURY AT LEWES  
AFTERNOON EXCHANGE  
May 2, 2017**

Carol Holzman, Executive Director, opened the meeting by welcoming everyone and thanking them for coming. She said she had a few things to go over and acknowledged that David Woodward, Senior Vice President at Springpoint, was here to answer any follow-up questions.

She gave the microphone to Chuck Rendulic, Director of Support Services, who provided an update on his area. First, he wanted to make sure everyone knew that the tree near the West Wing parking lot has been replaced and it looks great. The groundskeeper's goal is to try and cut grass every week on Wednesdays and Thursdays and have Friday as a buffer in case of bad weather. They will be planting summer flowers soon and continue with weeding and cleaning up of the beds. He said to look for fertilizer to be applied in the next week or two. Chuck said that he's received a couple of complaints about the lights on the fountain being out in the East Wing pond. He bought new transformers and should have the lights working soon. Maintenance will be power washing cottages first and then the apartments, starting the first week in June. They will also have the window cleaners here in June, after the power washing is done. Chuck doesn't have dates yet, but will get notices out to residents for both the power washing and window cleaning once they've been scheduled. The 2<sup>nd</sup> floor apartments are a little bit of a challenge, so be advised that Maintenance needs to utilize the unit to get the hose to the porch because there's no access from the outside.

During the month of April, 149 work orders were received and two are outstanding. One had to do with a roof leak and then having the ceiling painted and the other was a problem with the finish on some new cabinets that were installed.

Tom Lord asked what work was currently being done on the 2<sup>nd</sup> floor apartment in the front of the building. Chuck explained that the work they're doing on the 2<sup>nd</sup> floor porches is due to some water damage so they had to tear up the flooring and are replacing it with a new product. It's an exterior vinyl sheet that will protect the floors. Maintenance is working their way around the community, starting with the worst ones first.

Kathleen Dynan asked if Maintenance would power wash the cement at the cottages. Chuck advised that Maintenance will remove the porch/patio furniture, power wash and then put it back. Binky Tompkins asked if they will wash the houses before the windows are cleaned and Chuck answered that they will be spot power washing this year and they will have the windows cleaned after that.

Chuck turned the microphone back over to Carol who said that the census in Independent Living is 118 for a 90% occupancy. The Assisted Living census is 36/45 for an 80% occupancy. The Skilled census is currently 38/40 for a 95% occupancy, so we're running a strong community.

Carol reminded residents there is an East Wing Form on Monday at 11:30 am in the auditorium.

Carol announced new residents that have moved in: Arietta Falk in Apt. #230, and Ed & Marlyn Riggie in Apt. #106.

Carol said that the Flower Market that was held last week raised \$397 which will go toward the awning on the patio. The mini-golf event that was scheduled for Saturday has been canceled due to lack of participation by our vendors. There will be a mini-golf day for the residents on May 12 and we're still pursuing shade for the patio.

A second Nu-Step was added in the Fitness Room. It has been placed back in the corner. We did move one back into the center of the room to make it easier for wheel chairs and scooters to get through.

At next month's Afternoon Exchange on June 13<sup>th</sup>, Liz Carpenter, the Dietician will be here to answer questions. If you have any specific questions about nutrition or anything related to diet, residents may email Carol or drop a note in her box to make sure that Liz gets those questions to address when she's here next month.

Carol said that we're not exactly sure when Vic's last day is going to be. But, residents can watch for an announcement. We will hold some type of closure celebration in the Bistro to thank him for his more than 10 years of service with Cadbury. He's been with the organization for over 20 years. He's leaving, but is still maintaining employment with Springpoint. We want to give everyone the opportunity to say goodbye and thank him for his service.

The 10<sup>th</sup> Anniversary events are coming up. Committee Chairs are Carol Bishop, Adele Trout, Jean Carpenter and Deb Hamilton. Residents participating on the committee include, Gil Kaufman, Richard Woolley, Tom Lord, Bob Hein, Dick Cleaveland and Sallie Corbishley. Employees on the committee are Chris Dwyer, Jeff Smith, and Becky Carney. Carol encouraged residents to bring thoughts and ideas to any of them.

Carol reviewed PMI's she had received:

- Rename the Water Volley Ball to Beach Ball Water Volley so people will know that we use a lighter ball. Carol suggested contacting the Activity Committee to change the name.
- Provide some shade at the end benches of the shuffle board court. Carol said that we have trellis and one end has trees, but we'll take a look at it.
- I would like to see the Bistro hours extended and keep open from 7 am – 7 pm. No kitchen service in between breakfast, lunch and dinner. Just have soups, cold

sandwiches, snacks and drinks available. This could be handled by one person. Carol advised that this should go to the Dining Committee to address.

- A resident called Alan regarding a repair on a porch screen door. Within an hour and a half, Charlie had arrived, got the replacement piece and made the repair. Talk about efficient! Much appreciated and a big thanks to Charlie.

At that time, Carol opened the floor for questions and comments.

Frances Mason announced new residents Tom & Barbara Reed in Cottage 35. They moved in at the end of March.

After no additional comments or questions, David Woodward, Senior Vice President of Operations at Springpoint, said that he wanted to make sure residents are getting comfortable with where we're headed and to address any concerns. He said he will talk about a few items and then open the floor for any questions. He'll provide an update on the transition/affiliation and talk a little bit about transparency. He understands some residents may have questions on how Springpoint does business in New Jersey and how that applies to how they will do business in Delaware. He will also address reserves for Cadbury at Lewes and he'll talk a little about what Springpoint does with that. He will answer some questions on Quaker values and respect for those values.

First, regarding the transaction, we're a little behind. We think it will happen about the 15<sup>th</sup> of May. We're waiting on the regulatory body in NJ to sign off on it. David said he is aware that there have been some changes in that office, and perhaps they are not as familiar with affiliations as the previous manager was, but he's not aware of any hurdles. David assured residents, as he had mentioned before, the affiliation will be a thoughtful process and will ease into it.

There was a question that came up with respect to transparency. The comment was made that Springpoint is either known for or has a reputation for being pretty transparent in NJ. It may be due, in part, to the regulatory environment in New Jersey; it is a very heavy regulated state. Springpoint abides by all of those regulations. They would do it anyway, but they do it because it is the right thing to do. They will be bringing the same model of management, same transparency and same systems of communications to Lewes.

The third item that came up is the adequacy of reserves. The question that came up was if he had an opinion about whether the reserves at Cadbury were adequate. He said he doesn't have a lot of information about them and has not personally seen the Balance Sheet which is a good reflection of the depths of reserves, but he is aware that Cadbury is BBB rated for bonds. That is an investment grade rating and is a wonderful rating and should give residents confidence that Cadbury has adequate reserves. The second part of the question was linked to how to make sure it's enough to maintain the community properly. David explained that Springpoint uses a 3<sup>rd</sup> party, zumBrunnen, that performs a capital needs assessment. They will send a team out of engineers and experts with facilities management and they will produce an encyclopedia type manual complete with photographs, model numbers, and age of an asset and they tell us how the HVAC system is aging, how the roofs are holding up, etc. They will identify the life of the asset, the estimated serviceable life and identify the value and divide that and tell us what to put away to manage those reserves.

Later in 2017 or early 2018, a capital needs assessment will be in place for all Springpoint properties.

David said there is no change in his or the organization's position of the Quaker Values that many residents hold very dear. Rest assured; there is nothing in conflict with how Springpoint manages. They will continue to honor and respect that Quaker history. Residents will see that over time. David said the proof will be in what we do. In comparison as far as transparencies and values, he thinks the two communities are aligned and over time residents will gain some confidence with that.

At that time, David opened the floor for questions.

Binky Tompkins asked if the Cadbury name will change. David said he didn't know the answer to that question. He explained that a property in Cherry Hill has kept the Cadbury name and that property is being looked at in the market as potentially a Springpoint community. There is going to be an issue with some confusion in New Jersey, but there is no confusion in Lewes. They are actively trying to work through that and a name change is a big deal. On the positive side, it creates excitement and gives people a reason to put it into the press. On the negative side, some folks will be very concerned about it. It's not something they would take lightly change. It's a very volatile topic, and David assured everyone that they will work very carefully through that.

Pat Bock asked if a name change would change the mailing addresses since Cadbury is in the street address. David said that he will make sure that the folks that are working on this are aware. Tom Lord said that he's surprised to hear that the Cadbury in New Jersey is going to keep its name and was going to become part of Springpoint's organization. David said that property is not going to be a part of Springpoint and they have no relationship with them. The sign says Premier Cadbury. It's a big question in NJ, but there is no connection or relationship with Springpoint. The Cadbury at Home product line membership does have a service agreement with them. David said again that Springpoint is not acquiring, investing or affiliating with Premier Cadbury.

Kathleen Dynan said that she called the Better Business Bureau about Springpoint and they have the highest possible rating. She added that she also checked with Medicare and all of their nursing homes have the highest possible rating. Kathleen stated there was some misinformation and that somebody had said that someone who had decided to move into a cottage, but when they heard about the Springpoint affiliation, had decided not to. The information was incorrect. They are coming to Cadbury but are waiting for the appropriate apartment. They decided not to go into a cottage. It had nothing to do with Springpoint.

Jim Sylvanus asked if the arrangements with the doctor remain the same and will he continue to be here once per week on Thursdays. David said there are no plans to change clinic services or hours or physician services. Springpoint will always evaluate how they're providing services in clinics. They can expand relationships and make sure residents will always have access to high quality care they need.

Dick Cleaveland said that there are currently 7 communities listed on Springpoint's website and asked if Cadbury will become the 8<sup>th</sup>. David answered, "Yes, absolutely."

Gil Kaufman asked if there is standardization of clinic operations at Springpoint's CCRCs. David said there is not; they have a very broad variety of ways they deliver service. He said one community that has an extraordinary affiliation with a high end, well-placed physician services firm and they run the entire clinic. They run, they staff it, and it works wonderfully well. They pay rent to Springpoint and residents are pleased with services. He would love to expand that, but they don't come down far enough geographically. In all of the communities, there are doctors that provide services, physician assistants and nurse practitioners. It's the resident's choice as to who they receive services from and what they get out of that clinic. Hours are typically Monday-Friday. Clinic operations is something they would love to become more consistent with, but all communities have very strong feelings about what is going on in their clinic and it takes a lot of work to make a change.

Sharon Hoover asked David to explain how residents here at Cadbury are going to be able to interact to know whatever the thinking is at Springpoint regarding clinical services. In the past, residents have gone to the Director of Nursing and Executive Director to talk about services and figure out problems. Now, what kind of communication will residents have with Springpoint? David said resident governance is the answer to that. He is sure that Cadbury has a healthcare committee here and that committee is the system for getting information and feedback to local management. Carol as Executive Director will work very carefully with that committee to ensure collaboration on that. There is no agenda to come in with pre-determined ideas. Residents may have information that is beneficial for Springpoint to hear, and we'll work through that together.

Mildred Wiedmann asked David, resident wise, how does Cadbury compare as far as size of the community? Are we the smallest? David replied that Cadbury is the smallest retirement community in Springpoint's portfolio. The next smallest has 140 independent living apartments, and 40 skilled nursing beds. Other communities go as high as 360 units.

Fred Yost asked if private insurance is covered by the facilities. He has an HMO and resident doctor does not work with an HMO. He doesn't want to change insurance, but would like the services. Physical therapy is a good example and would like to see that addressed somehow. The insurance market is very complicated, but they do have benefit of some folks in the Home Office that help navigate through that. They are reimbursement specialists and they can help us try to work through that. Ultimately, a medical provider will make a decision on what insurance they will or will not accept and we can certainly influence them by bringing in people that may be more willing to take that insurance. Springpoint does not employ physicians. The therapy provider that Cadbury uses is Genesis, which is the same provider that Springpoint uses. The only way Springpoint will be able to navigate that is, once they get in the door, they can start talking about what insurance plans are accepted and see what kinds of leverage is there or the willingness of the medical doctors to be open to a conversation.

Bunny Guerrin asked for clarification of boundaries with respect to management. Some questions are more appropriately answered by local management but she's not sure with the affiliation. David explained that the Cadbury Senior Lifestyles Board, the parent, will cease to exist and be replaced with the Springpoint Board and there will be a member of the Cadbury Board that will be coming on to Springpoint's Parent Board. The local Lewes Board will continue. There have been some recent changes to the Board, so there will be some solicitation and management that will occur. From a practical perspective, the benefit

of the affiliation really has to do with shared services; providing services at cost versus purchasing them at market value and then having support systems for local management. David added that every month he meets with the Executive Directors from the 7 Springpoint CCRCs at the Home Office. He brings them into the Home Office; it's not convenient for a few of them, however, some of the folks in the Home Office, whether it is finance, legal or health care, governance, they are all in the office and available. Carol had the opportunity to meet her coworkers to compare notes and best practices with her peers. Every community is unique, but there are common themes that are raised. It's a nice benefit of being part of a larger organization. A resident suggested that an organization chart showing the chain of command would be nice for residents to see. David said that a chart was included in the initial communication meeting. We can certainly get a copy of that distributed.

Sharon Hoover said she assumes that the bylaws of our Board will be changed so that there will no longer be a requirement for Quakers on the Board. Also, the picture of Henry Cadbury that is displayed at the front entrance was difficult to obtain. It came from his niece and she would like it back if we decide that we're not going to keep it in the foyer. David said there is no agenda to change the décor or the feel. He hasn't looked at the bylaws. He wasn't aware that there was a requirement for Quaker membership. We'll look at them and work through all that. He doesn't have a clear answer on that until he sits down and looks at it. He said it's important for Springpoint and him to make sure that we have representation on the Board and that residents feel there is some transparent management going on. No one is going to come in and take the picture down. Please thank his niece and let her know that we respect that history and that's not going to change. Kathleen Dynan asked what percentage of residents are Quakers. Carol answered that it depends on if you're talking about Quakers that are members of a meeting or Quakers that are practicing. She said it is a small number.

Tom Lord asked if there are any problems that came up that were not anticipated between NJ and DE. David said he did not; fortunately, they have in-house counsel and she is an expert with affiliation and she has been the point person to navigate through all that. In NJ, there is a substantial bureaucracy, but she has not shared with me any surprises or concerns. With respect to our in-house council, Maureen Cafferty, will be coming here. Typically, questions for counsel and will meet with resident and address any questions after the affiliation.

David gave the microphone back to Carol for some closing comments. Carol thanked David for driving down to Cadbury and said we appreciate his presence. Then, she introduced Kelly Kingsley, Assistant Director of Nursing, who works closely with Ruthanne, the Director of Nursing and helps to navigate all the things that go on up in Skilled Care. Carol added that Tina Foskey has been filling in for us as the Social Worker while Meg Havens has been out on maternity leave and has decided to stay at home. Tina has been with us for about 4-5 months. She has decided not to stay on as the Social Worker, but has helped us hire Tara Millman. Tara started with us on Monday and has been in the industry a long time. She knows regulations, knows older bodies and minds, will understand how residents think and no problem is too difficult. Tina will be looking for another opportunity and Carol has agreed to be her preceptor and mentor as she pursues her Long Term Care Administrator license.

Carol thanked everyone for coming and the meeting was ended.