

NC MEDICAL  
 CARE COMMISSION  
**North Carolina Medical Care Commission**  
**Executive Summary of the CCRCs Community Improvement Relationships**  
**Continuing Care Retirement Community (CCRC)**

Organization: Galloway Ridge, Inc.

Date: 6-21-2010

Galloway Ridge welcomed its first residents in 2005 with a mission of providing its residents superior services at a reasonable cost and striving to provide a complement of services to support the resident's health, social, spiritual and recreational needs. Since inception, Galloway Ridge has paid property taxes to Chatham County in a total amount equal to \$1,398,953, \$415,515 of which was paid most recently in 2008. In addition to paying property taxes, Galloway Ridge has consistently engaged in a variety of other charitable efforts and contributions.

Soon after opening, in 2006, the Galloway Ridge Charitable Fund was established at the recommendation of the Board of Directors' Social Accountability Committee, a standing committee of the Board. The Charitable Fund was organized and continues to operate for the following purposes:

- (a) To carry out the mission of Galloway Ridge as stated in the Galloway Ridge Bylaws.
- (b) To provide or fund "Charity Care," defined as the unreimbursed costs to Galloway Ridge of providing health care, housing or other services to residents who are uninsured, underinsured or otherwise unable to pay for all or part of the services rendered.
- (c) To provide or fund "Community Benefits," defined as the unreimbursed costs to Galloway Ridge of providing the following:
  - i. Services, including health, recreation, community research, and education activities provided to the community at large, including the elderly.
  - ii. Charitable donations.
  - iii. Donated volunteer services.
  - iv. Donations and voluntary payments to government agencies.
  - v.
- (d) To solicit, receive, administer, invest and distribute funds for the purposes listed above.

Contributions to the Galloway Ridge Charitable Fund may be designated for any of three purposes:

- i) support for Galloway Ridge residents who may need assistance with fees in the future because of a difficult financial circumstance;
- ii) support of the Chatham Community; and
- iii) provision of Scholarships for Employees of Galloway Ridge.

Although Galloway Ridge is still in its early years, relationships have been fostered and established with numerous agencies and organizations throughout the community including the following:

Brian Chapel Consulting	Meals on Wheels
CCAHT Task Force Meeting	North Chatham School
Chapel in the Pines	Pittsboro Friends
Chatham County Democratic Women	Pittsboro Public Library
Chatham County Democrats	Reading program @ Pittsboro Elem.
Chatham County Human Relations Commission	Second Bloom Thrift Store
Chatham Housing Coalition	St. Bartholomew's
Chatham Outreach Alliance Food Pantry	St. Julia Church, Siler City
Community Education Foundation	St. Thomas Moore Church
Community Independent School	Tutoring at Scroggs School
Community Kitchen Chapel Hill	UNC Hospital/Hospice Volunteer
Continuing Care Community Residents	UNC Library
Cornucopia House	UNC Tour
Deep River Mediation	United Meth. Ret. Home Foundation
Duke University Heart Center	United Way
Duke University Hospital Volunteer Visitor	University United Methodist Church
Empowerment Housing Consultant	Village Voices
English as a Second Language Tutor	McDougal Elementary School Library
Eucharistic Minister	Habitat Home Store
Ferrington Cares	FHA Office
Ferrington House	Ferrington Woman's Club
Woods Charter School	Senior Center of Chatham County
Lindberger Center for Cancer Research	Chatham Co. Social Svcs Dept.

In 2009, Galloway Ridge not only supported the above mentioned organizations by fostering an environment that supported and encouraged its residents and employees to volunteer, it was also able to make the following specific donations:

- Chatham Co. Arts Council (\$10,000)
- St. Julia Catholic Church Brown Bag Ministries (\$10,000)
- Friends of Pittsboro Library (\$6,667)
- Chatham Co. Council on Aging (\$6,000)
- Boys and Girls Clubs of Eastern Piedmont (\$5,000)
- Central Carolina Community College Sanford (\$5,000)
- Chatham Literacy Council (\$5,000)
- Chatham Outreach Alliance (\$4,000)
- Chatham Education Foundation (\$3,000)
- Fuel UP at Perry Harrison School - Chapel in the Pines (\$2,000)
- Educational Scholarships to Galloway Ridge Employees (\$7,400)
- NC Alzheimers Association (\$1,310)
- UNC Lineberger Comprehensive Cancer Center (\$1,784)
- Senior Games of Chatham Co. (\$1,970)
- Relay for Life (\$2,183)
- Various other charitable contributions (\$14,000)
- Fitness memberships for Galloway Ridge employees (\$143,592)

**The North Carolina Medical Care Commission**  
**Reporting for Community Improvement and Charity Care/Community Benefit by a**  
**Continuing Care Retirement Community (CCRC)**

**Community Improvement Relationships** is an active process CCRC linking with the community agencies and organizations responsible for assessing and planning to meet the health and other needs of the community. CCRCs are expected to connection with these agencies and organizations to better define how the CCRC can use its particular strengths and talents to meet community benefit needs.

**Charity Care** is the unreimbursed costs to the facility of providing health care, housing, or other services to a resident who is uninsured, underinsured, or otherwise unable to pay for all or part of the services rendered. (Session Law 2001-17; GS 105-278.6A). Most likely the first priority identified by a CCRC for charity care/community benefits would be to provide charity care for its residents.

**Community Benefits** are the unreimbursed costs to the facility of providing the following:

1. Services, including health, recreation, community research, and education activities provided to the community at large, including the elderly.
2. Charitable donations.
3. Donated volunteer services
4. Donations and voluntary payments to government agencies.  
(Session Law 2001-17; GS 105-278.6A)

**POLICY:**

The CCRC shall submit at the time of borrowing and every year thereafter commencing with fiscal year ending in calendar 2001 the following information to the Medical Care Commission as long as the CCRC has outstanding North Carolina Medical Care Commission debt.

1. North Carolina Medical Care Commission, Executive Summary of the CCRCs Community Improvement Relationships.
2. North Carolina Medical Care Commission, Charity Care/Community Benefit Report
3. Any supplemental reports that describe Charity Care/Community Benefit programs and cost/expenses (e.g. IRS Form 990, Section III, annual reports, etc.)

**North Carolina Medicare Care Commission  
Executive Summary of the CCRCs Community Improvement Relationships  
Continuing Care Retirement Community (CCRC)**

Organization: \_\_\_\_\_ Date: \_\_\_\_\_

1. Statement of the CCRCs mission and commitment to charity care/community benefit.
  
  
  
  
  
  
  
  
  
  
2. Describe geographic service area and target populations for community benefits.
  
  
  
  
  
  
  
  
  
  
3. Describe the relationships with agencies and organization with in the community.
  
  
  
  
  
  
  
  
  
  
4. List current community benefit programs.

**Detailed Application for Property Tax Exemption Under G.S. 105-**

**Instructions** (Return to County Tax Office No Later Than October 1, 2001)

A facility may be granted a total exclusion under Section 1, G.S. 105-278.6A, (c), provided that conditions (1) through (5) are met AND condition (6) a. OR (6) b. is met.

If the facility qualifies under (6) a. AND meets conditions (1) through (5), check this box to obtain a total exemption. Only complete identifying information and signature. Do not complete the rest of the form. (Provide relevant documentation.)

If the facility qualifies under (6) b. AND meets conditions (1) through (5), complete the rest of the form below.

Provide all relevant attachments as noted under each category.

**REVENUE**

**Total Resident Revenue - As Disclosed in Most Recent Audited Financial Statement**

(Includes all monthly service fees, fee for service charges, amortized entry fee income for the year, and any fees collected that would not otherwise be amortized into income for the year associated with living in the facility. Excludes investment income, contributions and income from non-resident sources.) Attach Relevant Sections of Most Recent Audited Financial Statements

(1) \_\_\_\_\_

**CHARITY CARE**

**(A) Unreimbursed Health Care**

(From Medicare/Medicaid or Third Party cost reports, internal resident assistance data certified by the facility or audited financial statements which show amount of unreimbursed costs) Attach Applicable Pages of Cost Reports

**(B) Unreimbursed Housing and Services**

(From internal assistance reports (Lyons software or spreadsheet) certified by the facility and/or audited statements which show amount of unreimbursed costs and/or as disclosed in most recent audited financial statement)

**Total Charity Care**

(2) \_\_\_\_\_

**COMMUNITY BENEFITS**

(Amounts claimed are to be taken from audited financial statements which either footnote the amount or disclose the amount in the statement of operations as a line item and/or can be taken from documented receipt letters from entities receiving the service, donation or volunteer service, and/or as documented in the Lyons Software or similar spreadsheet program certified by the facility. The amounts are limited to actual expenses incurred by the facility to perform the service or provide the donation.)

**(A) Services**

(Verifiable unreimbursed expenses incurred by the facility to provide health, recreation, community research, and education activities to the community at large, including the elderly - DOES NOT include resident volunteer time.)

**(B) Charitable Donations**

(Actual cash outlay or equivalent dollar amount of donated items originally acquired by the facility and documented in facility community benefit report (Lyons software or spreadsheet) and/or noted in audited financial statements.)

Detailed Application for Property Tax Exemption Under G.S. 105-

**(C) Donated Volunteer Services**

(Cost to the facility for allowing employees to volunteer in community service projects or organizations and/or actual unreimbursed facility material, space and volunteer time as documented based on wages paid by the facility for the volunteer during the service period/project)

\_\_\_\_\_

**(D) Donations and Voluntary Payments to Government Agencies**

(Amounts to be taken from Receipted donations/payments from government agency receiving donation/payment when the facility would otherwise not have to pay the agency – goodwill.)

\_\_\_\_\_

**Total Community Benefits**

(3) \_\_\_\_\_

**Total Community Benefits and Charity Care** (2) + (3)

(4) \_\_\_\_\_

Percentage of Resident Revenue

Total Community Benefits and Charity Care Divided by

(4)

Total Resident Revenue

(1)

Percentage of Resident Revenue (4) divided by (1)

\_\_\_\_\_ %

**Exclusion Percentage Based on Percent of Resident Revenue Above**

% of Revenue	Exclusion %	
5%	100%	
4%	80%	
3%	60%	
2%	40%	
1%	20%	<b>Exclusion %</b> <u>    </u> %

Facility  
Name \_\_\_\_\_

County \_\_\_\_\_

Facility  
Address \_\_\_\_\_

*By Signing Below We Hereby Certify the Information Stated Above is Correct and True as Supported by Our Financial and Facility Records:*

\_\_\_\_\_  
Officer's Signature

\_\_\_\_\_  
Date