

We Were Meant To Be

AN HISTORICAL PERSPECTIVE
FROM INCEPTION TO 2008





“How did it all come to be? The history of The Pines—how it has grown and why it has thrived—is a tale of community and tenacity. The idea emerged because a group of Davidson friends saw a need. It moved forward because talented people and generous institutions committed time and resources. And it succeeded, thanks to the convergence of church, college, and town.”

—From We Were Meant To Be, Chapter One

We Were Meant To Be recognizes the many individuals and institutions who created and shaped a distinctive continuing care retirement community in the heart of Davidson. Beautiful photographs and twenty-two sidebars further illuminate the welcoming community of residents, comprehensive services, and extensive facilities at The Pines.

And so . . .

- If you seek a community where you could meet your new best friends . . .
- If you are excited by the special lectures and cultural events only a great college town can offer . . .
- If you love living in beautiful, well-maintained living accommodations . . .
- If you delight in great food every day . . .
- If you enjoy lovely landscaped grounds . . .
- If you seek the lifelong security of high quality health care, right where you live . . .

This is your story.



We Were Meant To Be

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We Were Meant To Be

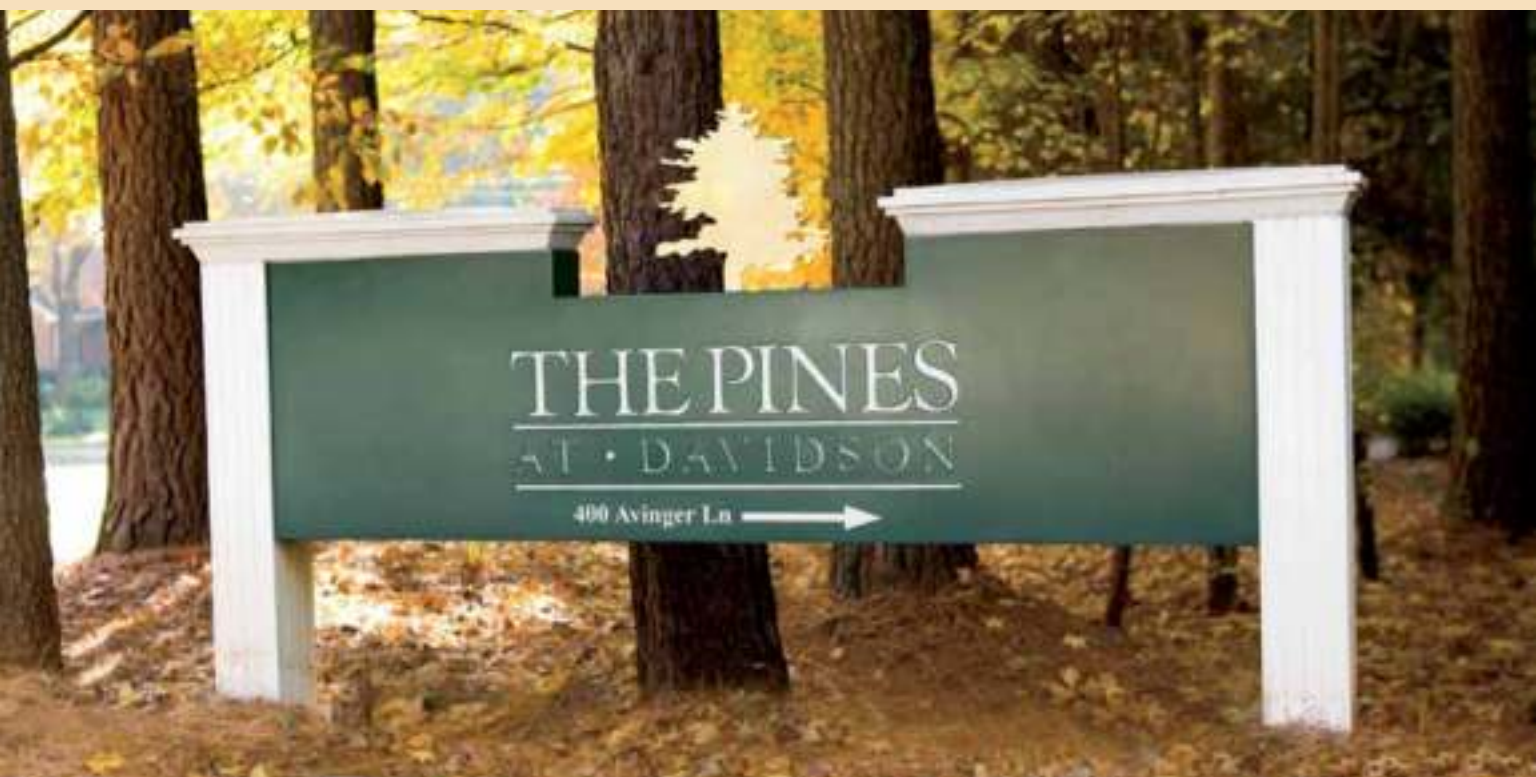
AN HISTORICAL PERSPECTIVE
FROM INCEPTION TO 2008



THE PINES

AT • DAVIDSON

DAVIDSON, NORTH CAROLINA



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Charles (Chuck) C. Adams Memorial Fountain.

Acknowledgments



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The Pines at Davidson also deeply appreciates the work of the Archives Committee, whose members Robert Avinger, John Kelton (chair), Lawrence Kimbrough, and Mildred Workman launched the effort to record The Pines' history, culminating in the publication of this book. And many thanks to Pam Kelley for her research and writing and to Motria Procyk for coordinating the project.

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Mission Statement



*Provide high quality housing, health care and other services
that exceed Residents' expectations.*

In pursuing its mission, The Pines at Davidson will set itself apart by the following:

- Attracting and retaining a professional and caring staff committed to the service and well-being of the Residents.
- Being ever mindful of the needs of the Residents.
- Providing excellent facilities and services with special attention to dining, health care, maintenance, and security.
- Embracing innovation that invigorates traditional practices.
- Taking full advantage of integrating The Pines' experience with Davidson and surrounding communities.
- Maintaining its identity as a nonprofit community established by members and friends of Davidson College Presbyterian Church and The Trustees of Davidson College.

CHAPTER ONE

An Idea Takes Shape





AT THE PINES AT DAVIDSON, DAYS BEGIN EARLY.

With the sun just up and the grass still dewy, residents head out for a walk on the campus. Soon, more people are out and about—fetching the morning paper, joining friends for breakfast at the café.

Before long, the Jetton Community Center buzzes with activity. At the spacious, sunlit indoor pool, a water aerobics instructor directs her class to stretch and bend. In the kitchen, the dining staff preps for lunch. Down the hall, residents gather to listen to a lecture by a Davidson College professor.

That is The Pines today—a vibrant continuing care retirement community that benefits from the liberal arts college connections in the town of Davidson and diverse cultural offerings in Charlotte, just thirty minutes away.

Located on a heavily wooded campus near Lake Norman, The Pines offers healthy and tasty cuisine, modern and varied accommodations, as well as the security of high-quality health care that is available when needed.

Nearly a thousand people have called The Pines home since the first residents arrived in July 1988. Before that, Avinger Lane did not exist, The Pines property was red clay farmland, and a continuing care retirement community in Davidson was merely a wish.

How did it all come to be? The history of The Pines—how it has grown and why it has thrived—is a tale of community and tenacity. The idea emerged because a group of Davidson friends saw a need. It moved forward because talented people and generous institutions committed time and resources. And it succeeded, thanks to the convergence of church, college, and town.

The Pines opened on July 18, 1988. But the improbable story of how the institution got its start goes back to the 1970s. Today, no one remembers who initially suggested a continuing care retirement community in Davidson, but Mildred Workman first heard of it during a walk home from Sunday services at Davidson College Presbyterian Church.



Former Residents' Association President Bette Warren and resident Marcia Adams arranging flowers in The Pines' Arts and Crafts Room.



Mildred Workman was among the Davidson residents in the late 1970s who spearheaded efforts to create a local retirement community. She became one of The Pines' earliest residents.

Mrs. Workman and her husband, William Gatewood “Gaty” Workman, were strolling with neighbors Robert and Pat Sailstad when Mrs. Sailstad asked if the couple would be interested in meeting about building a senior community that would offer independent and assisted living as well as nursing care. In a 2010 interview, Mrs. Workman recalled that she did not even check with her husband. Absolutely, she said.

Years earlier, when her mother had needed long-term care, Mrs. Workman’s only choice in northern Mecklenburg County was a modest nursing home located between Davidson and Concord. With no senior living options in town, older residents typically left Davidson, often moving to Charlotte for continuing care retirement community (CCRC) services. By definition, a CCRC includes independent living, assisted living, and nursing care that allows it to serve residents until the end of their lives.

Mrs. Workman did not want to leave Davidson. She did not want her friends to move away, either. “We knew,” she said, “there was a crying need for it.”

THE ORIGIN OF THE IDEA

✧ By the time the Sailstads recruited the Workmans, they had already talked with several other Davidson College Presbyterian Church members, including Bill and Betty Cumming as well as Dilly and Pete Barnes.

These were not the most obvious people to tackle such a project. None had deep pockets or expertise in the field of retirement communities. The group “could not have been greener,” Mrs. Workman said. Perhaps that lack of knowledge worked in their favor. Unaware of obstacles they might face, they just decided to do it.

Their idea gained momentum after Davidson College President Sam Spencer told organizers about the Black Mountain continuing care retirement community known as Highland Farms. Dr. Spencer had become acquainted with the facility because he and his family spent summer vacations in nearby Montreat. While there, Dr. Spencer attended Rotary Club meetings held at Highland Farms.

In 1977, at Dr. Spencer’s suggestion, the Davidson group paid a visit to Highland Farms and met with Chester Prentice, its director. They

liked what they saw, and Mr. Prentice liked their ideas. He offered to partner with them, building the Davidson project as a for-profit facility, like Highland Farms.

The volunteers dubbed themselves the Davidson Retirement Community Committee. The group included the Cummings, the Workmans, the Sailstads, Sam and Ava Spencer, Robert Currie, Dr. J. Ronald Hunt, and Dr. W. T. Williams, Jr. All were affiliated with Davidson College, Davidson College Presbyterian Church, or both.

William “Bill” P. Cumming was a retired Davidson English professor, while his wife, Elizabeth “Betty” Cumming, had taught English at Queens College, now Queens University. Dr. Workman was a retired Davidson psychology professor. Mrs. Workman had worked in the public schools.

Mr. Currie was the College’s business manager. Mr. Sailstad worked in College development and public relations, later moving to The Duke Endowment. Drs. Hunt and Williams were the founding partners of the Davidson Clinic, a local medical practice.

By 1978 their plans were gaining traction. That January the Davidson College Trustees’ Finance Committee voted to offer the group an option to buy college land off Concord Road known as the McConnell property. The Committee directed the College’s land planner to sketch out a plan. With money the group members had raised, they hired a consultant, who pronounced the idea viable.

But in 1979 economic realities hit. The nation was mired in a recession and interest rates hovered in the high teens. It was a tough time to borrow money. Mr. Prentice of Highland Farms dropped his partnership plans.

In November 1979 the Davidson Retirement Community Committee broke the bad news in a letter to people interested in the project. “We are not abandoning our hope for a Davidson Retirement Center,” the Committee wrote, “and we will make every effort to pursue the idea as soon as conditions in the economy improve.”



Davidson College President Emeritus Sam Spencer and his wife, Ava. Both were members of The Pines’ Board of Directors and later became residents.

A SECOND TRY

✧ In the early 1980s, renewed by the energy of two recently arrived Davidson residents—the Reverend Charles Raynal III and Giddy Erwin Dyer—the group tried again.

Rev. Raynal had moved in 1979 from Louisiana to Davidson, the home of his alma mater. He was pleased to be returning to familiar ground for a new job: leading Davidson College Presbyterian Church.



DAVIDSON COLLEGE PRESBYTERIAN CHURCH AND DAVIDSON COLLEGE

No institutions have been more important to the history of The Pines than Davidson College Presbyterian Church (DCPC) and Davidson College. Both were instrumental in The Pines' creation and continue to have close ties with the continuing care retirement community.

DCPC holds a weekly Sunday school class at The Pines and organizes a monthly vespers service officiated by ministers of varying denominations. Many Pines' residents and staff are DCPC members. DCPC also supports The Pines through The Pines Connection, a ministry that organizes regular visits and chapel services for residents of the Schramm Health Center.



The Pines' relationship with the College has always been strong and is often cited as a reason individuals choose to move to The Pines. Residents can audit classes and attend events at the College, which is consistently ranked among *U.S. News & World Report's* top ten liberal arts colleges. Davidson professors regularly visit The Pines to speak at the Learning in Retirement program. And when Davidson's men's and women's basketball teams play home games, they can count on Pines residents to cheer them on.

Robert and Jane Avinger, both instrumental in establishing The Pines and members of its Board of Directors, have continued to offer their time and expertise. Robert Avinger was the Board's first Chairman from 1988 to 1990. (Photo courtesy of the Avingers)



He was also familiar with church-related retirement communities because his father, the Reverend Charles Raynal, Jr., had helped develop the first of several communities affiliated with the Presbyterian Synod of South Carolina. By the time Rev. Raynal III arrived in Davidson, his parents had retired to the Presbyterian Home in Summerville, South Carolina, “so I knew what a blessing it was,” he said.

Mrs. Giddy Dyer, who had served in the Illinois state legislature, had grown up in Davidson, the daughter of a Davidson English professor. She and her husband, Bob, had returned to her hometown to retire. Soon the group was brainstorming at her dining room table. Mrs. Workman recalled that her husband would offer to make one of his coveted sugar cakes and Mrs. Dyer would brew a pot of coffee. “That’s where we laid our plans,” Mrs. Workman said. “That was definitely a turning point.”

By then, the group had support from a growing number of volunteers, including John “Jack” and Dolly Tate, Robert and Jane Avinger, and Lawrence and Tish Kimbrough. These people contributed business acumen and connections that stretched beyond Davidson.

Mr. Tate was President of Piedmont Bank and Trust, and Mr. Kimbrough was a Vice President of that bank who later became Chief Executive Officer and President of First Charter Bank. Mr. Tate’s wife, Dolly, was a well-known children’s advocate.

Mrs. Workman had recruited the Avingers, an accomplishment for which she gladly took credit. “This is my one claim to fame,” she said in 2010. “I said, ‘If we can get these two people involved—Bob and Jane Avinger—we can do it. They’re both full of energy and know-how and devotion to Davidson.’”



As pastor of Davidson College Presbyterian Church, the Reverend Charles Raynal III helped lead early efforts to establish The Pines. (Photo courtesy of the Reverend Charles Raynal III)

Davidson College is consistently ranked among *U.S. News & World Report's* top ten liberal arts colleges.



Jane Avinger was active in the Davidson community and would later serve as a Town Board member. Bob Avinger had recently left his position at the College as an economics professor to join Sterling Capital Management, a money-management firm in Charlotte. His leadership turned out to be crucial. “He’s the one who brought it all together and made it happen,” Mr. Kimbrough said.

During this time, the group was working on multiple fronts. It evaluated potential sites. It tried to convince the Presbyterian Synod of North Carolina to take on the project, and it asked the Mecklenburg Presbytery, now the Presbytery of Charlotte, to launch a fundraising campaign.

The Presbyterian Synod was interested but was not ready to commit its support. The Davidson group decided it could not wait.

And though the Mecklenburg Presbytery endorsed the Davidson project in 1983, it would not commit to raising money for it. “I got a flat ‘no,’” Rev. Raynal remembered. “That was a great disappointment to me.”

Luckily, one group—the Davidson College Presbyterian Church—was squarely behind the plan. The church, known locally as DCPC, made the continuing care retirement community its number one mission, and the project became part of Rev. Raynal’s job as minister.

With the support of the church and a favorable feasibility study from Gastonia’s Spectrum Marketing, the group decided the time was right to launch the project. One of its first steps was to incorporate. On February 9, 1983, the entity that would later be The Pines at Davidson became a nonprofit called the Davidson Retirement Community, Inc. (DRC).

The new nonprofit initially had four members on its Board of Directors: Mr. Sailstad, Dr. Avinger, Rev. Raynal, and William H. Cannon, a Charlotte real estate lawyer. Later that year, the Board expanded to twenty-five members. It elected Dr. Avinger as president, Charter Properties President William A. White, Jr. as vice president, and Mr. Kimbrough as secretary-treasurer.

In April 1983 the Board launched a quiet campaign, sending out fundraising letters in hopes of raising at least \$100,000 to buy land and pay for administrative costs.

Board members, meanwhile, debated buying two different pieces of property—the College-owned McConnell property that had first been offered in the late 1970s and land near Pine Road known as the Thompson Farm.

The Thompson property had once been owned by Samuel Asbury



Thompson, a member of a longtime Davidson family. At the time, D. G. Martin was the landowner of record, holding it as trustee for a group that included his wife, Harriet Martin, and her brother, Craig Wall, Jr., a businessman who graduated from Davidson and later chaired the College's Board of Trustees. Mr. Martin, a lawyer, is the son of former Davidson College President Grier Martin.

Each property had strengths. The McConnell land, about thirty-three acres on Concord Road, was more accessible, and building a road to it would be easier. But the Thompson Farm, at about forty-seven acres, was larger, safer for pedestrians, and closer to town. The Board also found its natural features more desirable.

An early aerial shot of the Thompson property that would become The Pines campus.

An Idea Takes Shape



John Kelton, Davidson College Psychology Professor Emeritus, led the Davidson College Presbyterian Church's major fundraising campaign to build The Pines. He also served on the Board of Directors and later became a resident. (Photo courtesy of Davidson College)

In the end, the vote went to the Thompson property. The Board purchased it in January 1984 for \$272,187.55. The group paid about \$58,000 up front and agreed to pay the rest in equal installments of about \$71,000 plus interest over three years. The price, below market value, represented in effect a gift to the continuing care retirement community, Mr. Martin said.

In August 1984 the project cleared another hurdle. The state approved a certificate of need that permitted the institution to build a nursing unit.

THE BIG CAMPAIGN

✧ Davidson College Presbyterian Church (DCPC), meanwhile, had begun planning a fundraising campaign for the proposed retirement community. John Kelton, a Davidson College psychology professor, would chair the campaign. But this campaign was a new challenge for DCPC. Because Davidson College actually owned the church property, the church had never undertaken a major building campaign.

Dr. Kelton was a good choice, Rev. Raynal said. "His leadership was remarkable. People in Davidson trusted him. He just generated enthusiasm." When church leaders voted on a goal of \$750,000, "I gulped a couple of times," Dr. Kelton recalled. The total was twice the church's annual budget. At the time the church had 450 members, including adults and children. It had never tried to raise such a large sum of money.

Dr. Kelton announced the goal to more than two hundred people at a campaign kickoff dinner on November 7, 1984. Mrs. Workman remembered a few gasps from the audience that evening. "We never had raised so much money, ever," she said.

Mr. Kimbrough was among the many volunteers asking for contributions. He came equipped with good experience. In the early 1970s, he had helped lead the largest community fundraising drive to date—the effort to build the Lake Norman YMCA. It was easy to ask for donations, he said, because the cause was a good one.

North Mecklenburg's first continuing care retirement community would provide a sorely needed service. It would also work hard to be affordable and would set aside funds to help residents whose money ran short.

Donors responded to the request for support. Less than a month after the campaign launched, the church had gifts and pledges topping its ambitious goal. In the end, it raised \$840,000. Essential to the success was a \$150,000 challenge gift from church member William Howard Jetton, a banker with Piedmont Bank and Trust. “Bill Jetton’s gift was huge,” Mr. Kimbrough said.

With the campaign’s success, momentum “just kind of swelled,” Mrs. Avinger said. “You could feel a lovely sense of community.” And so, with this second try, the project really was on its way.

ONE STEP AT A TIME

✧ What should the new continuing care retirement community be called?

Volunteers and Board members tossed out a variety of suggestions for names, including “The Village at Davidson,” “Wellspring,” and “Iona,” a reference to the storied Scottish island. After much discussion, on February 26, 1985, the Davidson Retirement Community Board voted on “The Pines at Davidson,” a nod to the property’s many pine trees. The name, Mrs. Avinger said in a 2010 interview, “has been just fine.”

With land secured and DCPC’s successful fundraising campaign behind them, Board members in April 1985 launched a second capital campaign to tap resources beyond the Davidson community.

Volunteers called on area churches, Charlotte business leaders, Davidson alumni, and others who might be interested in a continuing care retirement community in Davidson. They approached local residents who might want to move to The Pines, as well as people outside the area who had older family members living in Davidson.

During that time, the Avingers often entertained prospective donors at their home, then on Concord Road. Many were Davidson alumni who came through with generous gifts. “That Davidson loyalty was very, very strong,” Dr. Avinger said.

With fundraising continuing to progress, the Davidson Retirement Community Board hired the Roanoke-based architectural firm of Sheretz, Franklin, Crawford & Shaffner in mid-1984. Also known as SFCS, the firm specialized in building continuing care retirement communities. The Board also chose Washington, D.C.-based Partners in Planning, a company that specialized in designing senior housing and

Key to approval was a generous decision by the Davidson College Board of Trustees to pledge more than five million dollars in College assets to secure a portion of the loan.





William Howard Jetton.

THE JETTON LEGACY

On September 3, 1996, members of The Pines' Board of Directors raised champagne glasses to toast Sarah Jetton and mark the creation of the William H. and Sarah E. Jetton Deferred Giving Society.

The Jetton Society recognizes donors who have made provisions in their estate plans to give to The Pines after their death or who have created charitable gift annuities that name The Pines as a beneficiary. Each fall the Jetton Society holds a dinner to thank members. The dinners often feature a local leader who discusses philanthropy's role in strengthening communities. Speakers have included John Kuykendall, President Emeritus of Davidson College; James Martin, former Governor of North Carolina; Ruth Shaw, former President and Chief Executive Officer of Duke Power Company; and Gene Cochrane, President of the Duke Endowment.

The Board named the Society for Sarah Jetton and her brother, William Howard, to honor their important roles in creating the retirement community. It was Mr. Jetton, a banker for the Piedmont Bank and Trust Company, who pledged a six-figure challenge gift in the Davidson College Presbyterian Church's 1984 fundraising campaign for The Pines. That gift, the campaign's largest, was key to its success. Mr. Jetton and his wife, Nancy, left an additional substantial gift to The Pines in their estate plans. The Jetton Community Center is named in their honor.

long-term care environments. That group, which included environmental gerontologists, used the Board's goals to outline a program to guide the architect.

"The Board wanted a very state-of-the-art community that would enhance the lives of the seniors who were going to live there," said Greg Jones, the project's lead architect. Today, he said, other retirement com-

A graduate of Salem College, Sarah Jetton also worked in the financial industry, as an executive secretary at the companies that preceded Barclays American Corporation. When a group of Davidson residents began planning a local retirement community, she happily lent her business skills. For years, Miss Jetton was the efficient keeper of minutes and secretary for fundraising efforts.

The siblings were descended from one of Mecklenburg County's oldest families. That family had owned a large tract of land west of Davidson that was originally granted to their ancestor, John Jetton, by royal patent in 1754.

Mr. Jetton did not live to see the retirement community he helped build. He died in 1985 at age seventy-six. But his sister became one of The Pines' first residents, moving into an apartment in July 1988. She was seventy-five then, and she liked to encourage people not to wait too long to move in so they could have plenty of time to enjoy their new home.

As a resident, she continued to support the retirement community by writing thank-you notes to Pines donors. Miss Jetton lived at The Pines until her death in 2007 at age ninety-three, leaving a generous bequest to The Pines to help secure the future of the community and of those residents who would someday call it home.



Sarah Elizabeth Jetton.

munities have forged affiliations with nearby colleges or universities. But when The Pines did it in the 1980s, “they were on the cutting edge.”

The Thompson Farm property had some variances in elevation—“enough topography to challenge you,” Mr. Jones said. To accommodate the elevation changes, SFSC designed an apartment building with three floors on the downhill side and two floors on the uphill side.



*Spectrum Marketing
President David Ratchford
led The Pines' early sales
and marketing efforts.*

The Pines opted for a single building to house assisted living and nursing care as well as independent living apartments. “To have all the buildings attached, that was all kind of new,” Mr. Jones remarked.

Among those playing an important role during this period was David Ratchford, President of Gastonia’s Spectrum Marketing. Project organizers had hired Spectrum Marketing early on to study the potential demand for a Davidson continuing care retirement community.

Later, Spectrum took charge of marketing and sales. At first, Mr. Ratchford worked in a closet-sized office at DCPC. Then he moved to The Depot building in downtown Davidson. Mr. Ratchford also attended many luncheons and fellowship dinners at churches in surrounding towns, such as Mooresville, Statesville, Salisbury, Concord, and Kannapolis, promoting The Pines “in a real low-key way.”

During that time, Mr. Ratchford relied on volunteer assistance from Davidson resident Sarah Jetton. “She was a tremendous help with committee work and especially to me in the marketing and during the fundraising,” he recalled.

In late 1985, as Spectrum’s marketing efforts ramped up, Mr. Ratchford moved to a modular office on Pine Road. Armed with floor plans, renderings, and other marketing materials, he began selling the apartments and cottages.

That first month, he sold about twenty-four units, mostly to people who had been waiting for sales to begin. “I can remember going to people’s houses over the holidays,” he said. “Everyone was queued up and wanted to reserve the best locations.” He recalled: “I had fun going to the homes of future residents, sharing cakes, cookies and lots of Coca-Colas and coffee.”

Sales progressed steadily. “They put down a 10 percent deposit and signed an agreement saying they would take it when it was ready,” Mr. Ratchford said.

The Pines had to sell 50 percent of its residences to begin construction. The Board also had to get a construction loan. Procuring a loan was not an easy task. Retirement communities could be risky investments. One bank, First Union, turned down The Pines. “They thought it was too speculative,” Mr. Kimbrough said. But United Carolina Bank said yes, approving a construction loan of about eighteen million dollars.

LEGAL COUNSEL

From its founding, the sound advice The Pines has received from its lawyers has been a key ingredient in the continuing care retirement community's success.

Even before The Pines opened in 1988, the Charlotte firm of Smith Helms Mulliss & Moore helped obtain its tax exemption. The firm later became Helms Mulliss & Wicker, and then McGuireWoods following a 2008 merger.

Though the name changed over the years, many of the same lawyers in the firm continued to serve The Pines. For more than two decades, Herbert Browne, Jr. has been the backbone of The Pines' legal team. Mr. Browne has also served during that time as a member of The Pines' Board of Directors.

Mr. Browne, a Harvard Law School graduate and nationally ranked senior doubles tennis player, has handled a variety of matters for The Pines, including contract issues and the disclosure statements furnished to entering residents. "His judgment is very good," Pines' Chief Financial Officer David Rainey said. "If it doesn't hold water with Herb, we just forget about the idea."

With McGuireWoods' broad range of expertise, The Pines can call on its lawyers for real estate and health care matters, litigation, insurance, and labor issues. The continuing care retirement community also uses the firm of Smith Moore Leatherwood in Greensboro for labor and health care issues. That law practice was formed in 2002 when Smith Helms Mulliss & Moore reorganized into two firms.

The Pines has worked proactively with its lawyers, seeking advice before making decisions. Once legal advice is received, The Pines follows it, Mr. Rainey said. That policy has served the facility well. During the first twenty-five years of its existence (1983–2008), he said, no one has filed a lawsuit against The Pines.



Herbert Browne, Jr.



John Kuykendall, Davidson College President Emeritus, and his wife, Missy. Both served on The Pines' Board of Directors. (Photo courtesy of the Kuykendalls)



Zack Zapack, Senior Vice President for Carolinas HealthCare System's Facilities Management Group, worked as project manager to build The Pines and later served as Chairman of the Board of Directors (1997–1999). Here, he is speaking at the groundbreaking of the warm water and hot water therapy pools.

Key to approval was a generous decision by the Davidson College Board of Trustees to pledge more than five million dollars in College assets to secure a portion of the loan.

Seddon “Rusty” Goode, Jr., President of Charlotte’s University Research Park, was a College trustee who later served on The Pines’ Board. At a Trustees meeting he argued in favor of the pledge, winning over some trustees reluctant to make the commitment. “I took the strong position that we were the company in a company town,” Mr. Goode said. “I just knew it was the right thing to do for Davidson College and the community.”

John Kuykendall, then President of Davidson College, also advocated that the College make the pledge. The risk to the College was small, he believed. Plus, “all these wonderful people who had served Davidson College were in the vanguard of people wanting to get it off the ground,” he said. “These were Davidson’s heart and soul.”

THE BULLDOZERS ARRIVE

✧ In the years leading up to construction, the volunteers who made up The Pines’ Board had made all decisions, big and small, about the retirement community project. By early 1986, as groundbreaking and construction neared, Mr. Goode suggested that the time had come to hire a professional manager.

Sitting in a Board meeting, “I thought, shoot, this is crazy to talk about what kind of phone system we were going to have,” he recalled. Mr. Goode also served on the Board of The Charlotte-Mecklenburg Hospital Authority (CMHA), now Carolinas HealthCare System (CHS). At his suggestion, The Pines hired the Hospital Authority, and in April 1986, Zack Zapack, an architect who headed the Hospital Authority’s facilities management group, took charge.

Mr. Zapack’s assignment was straightforward: help get The Pines built. Early on, he took a road trip with Board Vice Chairman Willis “Bill” J. Hidell, who was overseeing the building project for the Board. The trip proved valuable. The two men visited retirement communities in Pennsylvania and Virginia, asking questions and gathering information. “That helped us a lot,” Mr. Hidell recalled. “We avoided a lot of the problems they had.”

CAROLINAS HEALTHCARE SYSTEM

The Pines' close relationship with Carolinas HealthCare System (CHS) was cemented even before The Pines opened.

In April 1986 The Pines hired CHS, then known as The Charlotte-Mecklenburg Hospital Authority (CMHA), as its project manager. With construction looming, The Pines' volunteer Board of Directors needed professionals to oversee the work. Zack Zapack stepped in. Mr. Zapack, an architect, was then a vice president who headed the Hospital Authority's facilities management group.

"The original assignment was just to help them get the building built," Mr. Zapack said. The Hospital Authority was well-suited for the task. It had built Charlotte's Sardis Oaks nursing home and operated it along with the Huntersville Oaks nursing home.

As The Pines' opening day approached, Board members decided to ask the Hospital Authority to stay for three years as executive manager in order to provide expertise—policies and procedures, accounting practices, a computer system, and other guidance—to get the place up and running.

So Mr. Zapack continued working with The Pines as an administrative liaison between The Pines' Board and the Hospital Authority. The contract ended on schedule in July 1991. But The Pines' ties with the organization, now named Carolinas HealthCare System (CHS), have continued.

Dr. Ronnie Beamon, who has been Medical Director since The Pines opened, is employed by The Davidson Clinic, which is owned by CHS. Dr. Beamon serves as a personal physician to most health care and assisted living residents. He is on call twenty-four hours a day, seven days a week, and makes rounds in the Schramm Health Center at least weekly. He also sees some independent living residents during monthly office hours in the Wellness Clinic. Most are residents who do not drive.

"It's unusual to come see independent living residents, yes," Dr. Beamon said. "But I like to see them in their environment."

Residents also get occupational, speech, and physical therapy through CHS's Healthy@Home service. Carolinas HealthCare Mobile Dentistry visits regularly to serve residents in the Schramm Health Center. And because depression is often under-diagnosed in the elderly, The Pines provides the services of a geriatric psychiatrist from Carolinas Medical Center-Northeast.

As it turned out, Mr. Zapack's relationship with The Pines continued long after he completed his work as administrative liaison. When the management agreement ended in 1991, The Pines' Board members asked him to take a seat on the Board. He remained for more than decade, until 2003, and he chaired the Board from 1997 to 1999.



Dr. Ron Beamon.



The Pines broke ground on October 12, 1986. Left to right: Davidson Mayor Russell Knox, Board President Bob Avinger, Board member Betty Cumming, Rev. Charles Raynal III, and Davidson College President John Kuykendall.

As Mr. Zapack compared The Pines' blueprint with that of other facilities, he also had a realization: The Pines' volunteer Board had put together a really good plan. "I remember thinking, this is home-run stuff."

The Board hired the John Crosland Company of Charlotte to prepare the site and Rodgers Builders as general contractor. The Crosland Company, founded in 1937, had built many Charlotte neighborhoods and shopping centers. Rodgers Builders was also headquartered in Charlotte. After completing The Pines, Rodgers would go on to specialize in the construction of senior living communities.

Before construction could begin, The Pines needed one more thing: a building permit. To issue a permit, Mecklenburg County required an address for the project. That posed a problem. The soon-to-be road leading from Pine Road to the project did not have a name.

At a Board meeting during which the road's name was discussed at length, Board member Harry Wolfe, Jr. made a motion to name the street Avinger Lane, honoring the man who had led the group before the undertaking was incorporated. The vote was a unanimous yes.

On October 12, 1986, The Pines at Davidson broke ground. A Davidson College brass quintet provided prelude music. Mrs. Cumming, speaking on behalf of incoming residents, thanked all those involved: "Many of you are much younger than we, and much busier, and your labor and your generosity have been selfless and fine," she said. "Because of you, we are beginning the last chapter of our lives with a sense of security, of adventure and of joy."

The Reverend Raynal delivered the invocation. Years later, in 2010, he recalled "standing on the curb of Pine Road, where the entrance is now located. We're in the ditch. There was a cornfield behind us in the woods." Alongside him were many of the people who had given their time and talents for years—the Cummings, the Workmans, and the Sailstads, among others.



Volunteers and others review construction plans.

“Because of you, we are beginning the last chapter of our lives with a sense of security, of adventure and of joy.”

—Betty Cumming, speaking at The Pines’ groundbreaking in 1988



“I thought, ‘This building is actually going to be built. All this energy and long commitment is going somewhere.’ It was wonderful,” Rev. Raynal said. Mrs. Workman, meanwhile, had another kind of thought: “Suppose we build it and nobody comes?”

Days later, Mr. Ratchford watched as bulldozers began clearing trees, making the road into the site. As work progressed, the air filled with the smells of pine and newly turned soil.

By this time, Mr. Ratchford was as passionate about the continuing care retirement community as the people who first came up with the idea. As he walked down the new dirt path that would soon become Avinger Lane, Mr. Ratchford gave thanks that the dream would soon become a reality.



*left: The Schramm Health Center
during construction.*

*below: The Schramm Health Center
with Kizer courtyard, 2012.*



*right: Magnolia Court
during construction.*



below: Magnolia Court, 2011.





above: Cottages, 2011.

left: Newly built cottages.





above: Jetton Community Center, 2011.

*right: Jetton Community Center
interior during construction.*





left: Peggy and Bill Hidell Nursing Unit during construction.

below: Peggy and Bill Hidell Nursing Unit, 2011.



*right: Oak Court,
during construction.*

below: Oak Court, 2011.





Court yard, in early years (here) and in 2011.



CHAPTER TWO

Creating a Community





THE PINES' HEART AND SOUL

She was the woman who has been called the heart and soul of The Pines, the Oxford-educated English professor whose eloquence could persuade nearly anybody of anything.

Elizabeth "Betty" Cumming belonged to the original group of Davidson College Presbyterian Church members who wanted to build a continuing care retirement community. After working to launch the project, she and her husband, William Cumming, were also among The Pines' first residents.

Mrs. Cumming's work on behalf of The Pines was one of many efforts she made to improve her community. She was an early advocate of school integration and helped establish the Davidson-Cornelius Day Care Center, which provided child care to families from diverse economic backgrounds.

Mrs. Cumming grew up outside Boston, the descendant of Congregational missionaries and Salem sea captains and merchants. After earning degrees from Smith College and Oxford University, she returned to Smith to teach English, then moved to North Carolina in 1932 when she married Dr. Cumming, a Davidson College English professor.

After raising her two sons, she taught English at Queens College (now Queens University) and collaborated with her husband on several books that explained what early maps and prints of North America revealed about its early history.

In 1995 lawyers for The Pines credited Mrs. Cumming with helping them strike down the State of North Carolina's claim that The Pines was not a charitable organization for purposes of the sales tax. The Pines had sued after being denied a sales tax exemption, and during the trial, its lawyers used an argument Mrs. Cumming had made to the Presbytery years earlier when she was working to establish The Pines. Not all poverty is related to lack of money, she said, and went on to describe what she called the "poverty of aging." As people age, they lose loved ones as well as their faculties—sight, hearing, memory. This, she stated during the trial, "was one of the kinds of poverty Christ was talking about."

Mrs. Cumming's reflections on the founding of The Pines can be found in an article in The Pinepost, reprinted in Appendix 4.

CONSTRUCTION OF THE NEW FACILITY TOOK

twenty-one months. Zack Zapack, who oversaw the project, later remembered feeling satisfaction as he walked around the facility and realized “we’re creating a home” for many residents to come.

Many other people were walking around the property near Pine Road as well. With work progressing, it became a popular local attraction. Frontis Johnston, retired Davidson College Dean of Faculty, visited so often, in fact, that a construction supervisor finally equipped Dr. Johnston with his own hard hat.

And on one wet, muddy day, Jane Avinger and Missy Kuykendall, the wife of Davidson College President John Kuykendall and later a Pines’ Board member, were checking out construction progress when they came upon Betty Cumming, mired knee-deep in mud.

She was alone. Her husband, William Cumming, had set off to get help when he found he could not free her. So Mrs. Avinger and Mrs. Kuykendall lent a hand, extricating the retired English professor from the muck. But one of Mrs. Cumming’s shoes remained. As far as anyone knows, it is still there, perhaps part of the foundation.

Once rescued, Mrs. Cumming penned a thank-you note in the form of a poem:

An old lady (wits slightly a-blink),
In Pines mud started swiftly to sink,
When two ANGELS (’twas plain!)
Named Missy and Jane,
Came and helped haul
Her back to the brink!



*Elizabeth “Betty” Cumming.
(Photo courtesy of
Robert Cumming)*

OPENING DAY APPROACHES



*Edgar "Eddie" L. Muller
has served as Executive
Director at The Pines at
Davidson since March 1988.*



*David Rainey has served
as Chief Financial Officer
at The Pines at Davidson
since May 1988.*

✧ In late March 1988 The Pines' new Executive Director, Edgar "Eddie" L. Muller, came on board. Mr. Muller was a veteran in the long-term care industry. A South Carolina native, he had been for eleven years the Health Center Administrator of Greenwood Methodist Home, a continuing care retirement community in Greenwood, South Carolina. In 1981 he became the Senior Administrator of The Methodist Home in Charlotte. After six years there, Mr. Muller was chosen to be the first Chief Executive Officer of The Pines at Davidson.

With its three levels of care (independent, assisted, and nursing), The Pines presented fresh challenges for its new employees. The most immediate? Opening day. It could not be delayed, because future residents had sold their houses and needed to move. In less than four months, Mr. Muller had to hire a staff, develop a budget, write policies, and equip the facility.

At first, he worked in an office at Charlotte Memorial Hospital and Medical Center. With the building nearly complete, Pines' Board members had opted to continue to employ The Charlotte-Mecklenburg Hospital Authority's Mr. Zapack for three years to provide administrative support and oversight. The goal was to stabilize operations and ensure that systems were in place, then move to self-management.

Mr. Muller's first hire was David C. Rainey, a Davidson College graduate and certified public accountant who became Director of Financial Services. Under Mr. Muller's tutelage, Mr. Rainey would later become a licensed nursing home administrator.

One of the next employees hired was Mike Holthouser, as Director of Plant Services. Mr. Holthouser, who had grown up in nearby Mount Mourne, had been impressed with what he had heard about The Pines from his friend Rev. Charles Raynal. "It started to feel like a calling," Mr. Holthouser said. "I was feeling like this place was asking me to be a part of it."

In early July, Mr. Muller held his first staff meeting at The Pines. It was, by necessity, a stand-up meeting. The office furniture had not arrived yet.

RESIDENTS ARRIVE

✧ Finally, on a hot Monday—July 18, 1988—The Pines opened its doors to its first three residents—Grace Dean of Charlotte, Frances Caldwell of Davidson, and Nancy Piephoff of Concord. Elizabeth “Betsy” Haas, Director of Special Services, was on hand to welcome and help them with this transition.

When it opened, The Pines had 171 apartments, 12 cottages and 60 accommodations in the Health Center. With its long halls, the new apartment building felt so empty that Mrs. Piephoff was uneasy alone in her new third-floor home. To ease her fears, the Nursing Director, Sue Tatro, spent several nights on a nearby cot.

Soon, though, Mrs. Piephoff had plenty of neighbors. By the end of August, more than fifty people had arrived. Among the new arrivals were the Cummings. In a video John Kelton filmed of the Cummings’ moving day, Atlas Van Lines movers unload the couples’ furniture, as Dr. Bill Cumming recounts the first attempt he and others made in the 1970s to create the continuing care retirement community. Mrs. Betty Cumming notes they chose their first-floor apartment because it had a nice view into the woods.

In those early months, the facility still had a bare-bones atmosphere, a not-quite-finished newness. The most obvious missing element in 1988, residents agreed, was landscaping.

“All I could see was mud and construction,” Phyllis Fowler, one of the first cottage residents, later wrote in a *Pinepost* article. “I always say the day before our apartment was ready, we moved in,” said Mildred Workman, who arrived with husband Gaty in August.



The Pines’ first three residents—Fran Caldwell, Grace Dean, and Nancy Piephoff—attending The Pines’ third anniversary celebration on July 18, 1991.

Pines residents, supporters, and staff gather on July 25, 1988, as William Cumming cuts the ribbon in a ceremony marking The Pines' opening.



But residents—and the community—were thrilled that Davidson's newest institution was finally open. At a ribbon-cutting ceremony on July 25, 1988, Davidson Mayor Russell Knox declared the occasion “one of the most exciting days in the history of the town of Davidson. This is a community that's excited about your coming.”

Once The Pines opened, the Davidson community continued its involvement. Davidson College donated framed prints to decorate bare hallway walls. Davidson resident Judy Schuh, who was taking a leave from her career as a French teacher, ran the reception desk for a year. “The residents got the impression I could solve problems I couldn't, like fixing TVs,” Mrs. Schuh recalled. “I really enjoyed that year,” she said. “I had a wonderful time.”

As apartments filled, Mr. Holthouser learned to seek out residents when he encountered some confounding aspect of his new job. To familiarize himself with housekeeping, he quizzed a resident who had owned a laundry. Another resident had been in textiles. Thanks to him, Mr. Holthouser said, “I learned what 280-thread-count linens were.”

He also taught his staff to help with whatever residents needed, whether it was hooking up a telephone answering machine or assisting a resident who had misplaced her purse. He even had staff shirts printed to underline the philosophy: “The difficult we do immediately. The impossible takes a little longer.”

BUILDING A COMMUNITY

✧ One thing everyone agrees about those early years: the budget was lean. In October 1988 The Pines issued twenty-four million dollars in tax-exempt revenue bonds. The institution used the money to pay off its higher-interest United Carolina Bank construction loan and to provide operating cash until it was housing enough residents to generate sufficient income.

Until it paid off some of its debt, The Pines found creative ways to pinch pennies. Mr. Muller played chauffeur, driving the activity bus. Bill Hidell, who served over the years as the Board's Vice Chairman and Chairman, helped out with admissions.

And instead of hiring landscapers, Mr. Holthouser used his landscaping license to buy plants wholesale. Mrs. Avinger, a skilled gardener, often accompanied him, climbing into his pick-up truck and heading to Winston-Salem to fill the truck bed with trees and shrubs.

An emerging community spirit got a major boost in January 1989, when residents formed the Residents' Association, electing officers and committee chairs for the first Residents' Council. Ralph Glenn was elected President. Mr. Glenn, from nearby Concord, was perfect for the job, Mr. Muller recalled. As a retired school administrator, he knew how to bring people together to work for the common good.

In its first year, the Residents' Council launched white elephant sales and movie nights. Volunteers began to loan books through a resident-run library. Soon there were bridge games, coffee and Kahlua nights, monthly birthday celebrations, and a decorated Pines bus that chugged down Main Street in the annual North Mecklenburg Christmas parade. The Pines' culture was beginning to take shape.



*Director of Plant Services
Mike Holthouser dances with
resident Sarah Jetton.*



*The library, staffed by resident volunteers, was
set up soon after The Pines opened.*

TENDING THE GROUNDS

In 2003 The Pines' campus became the first retirement community east of the Mississippi accepted as a member of the American Public Gardens Association, joining such distinguished company as the Sarah P. Duke Gardens in Durham and the gardens of Colonial Williamsburg. It was quite an honor for a campus where red clay was once the most prominent landscape feature.

In the early days, two people in particular—Mike Holthouser and Jane Avinger—worked to turn that red clay into lovely grounds with gazebos and fountains integrated among trees, shrubs, and flowers.

Mr. Holthouser, the now-retired Director of Plant Services, was a horticulturalist who owned a landscaping company before joining The Pines in 1988. Mrs. Avinger, who worked with other volunteers to create The Pines, was an accomplished gardener. In The Pines' first year, the two made regular trips to nurseries, loading up Mr. Holthouser's pick-up truck. That year, The Pines planted more than five hundred trees.

Their strengths complemented each other. Mr. Holthouser focused on acquiring basic plant material, while Mrs. Avinger lobbied to bring in more unusual specimens. "I wanted pretty things," she said, laughing.

Mrs. Avinger also encouraged administrators to construct patios and outdoor



A detail of the garden pool fountain.



The gazebo in the main courtyard.

areas that would add to residents' enjoyment of the campus. In 1990 The Pines built its first gazebo, with an accompanying fountain and rose garden. The area remains a focal point for resident activities, including the annual spring garden party.

Over time, The Pines lost its barren look. In 1994 Stuart McCachern was hired and later became Head Groundskeeper. By the time The Pines earned membership in the American Public Gardens Association, it had an estimated two hundred plant species. Some of those species, as well as several fountains, have been contributed as gifts in memory of loved ones.

After Mr. Holthouser retired in 2009, the community adopted its first landscaping master plan. The Pines' landscape architects, Durham's Lappas + Havener, created the document with the help of extensive input from residents, and partner Bob Lappas visits regularly to monitor progress. The plan will guide improvements for ten to fifteen years. The Pines has also committed to raising a three-million-dollar fund for future improvements. Part of that fund includes a subfund honoring Mr. Holthouser.

As a member of the American Public Gardens Association, The Pines welcomes visitors to explore its grounds. They can now use a tree and shrub guide to identify species during walks around campus. (This guide can be found in Appendix 6.) Many plant species are also labeled for easy identification.




Courtyard at The Villas at Laurel Ridge.



Flowers in the main courtyard.

“MOVING VANS ON TOP OF MOVING VANS”

 The goal was to reach capacity in three years, by fall 1991. “The critical thing was occupancy,” Mr. Rainey recalled. The higher the occupancy, the better the financial stability, so “you’ve got to fill up as fast as you can.”

By offering residences in a variety of sizes, the institution sought to appeal to different needs and budgets. The smallest residence, the 418-square-foot studio apartment, was designed to be affordable to a single retiree with limited funds. The largest was the two-bedroom cottage, with 1,565 square feet when outfitted with a sunroom.

FACES OF THE PINES

 Who lives at The Pines?

In some ways, that is an easy question to answer. Residents are, on average, about eighty-four. Many hail from the Carolinas, but others come from different states and countries, often drawn to The Pines because they have family who live nearby.

Proximity to Davidson College means you will always find retired professors and college staff. The community also has its share of former business people and ministers, farmers, doctors, and homemakers.

But ages, hometowns, and job descriptions only tell part of the story. Dig a little deeper, and you discover people with a lifetime of interesting experiences and stories.

The Pines was home to Dr. Thomas Manning, who served as President Eisenhower’s physician, and to Horace “Whitey” Shuman, who played for the Philadelphia Senators in the 1929 World Series. Residents have included Pat Mose, who performed at Radio City Music Hall; and John Batcha, who, in retirement, leads a humanitarian group that donates seeds to developing countries.

It has also been home to Jack Perry, the former U.S. ambassador to Bulgaria, and to several authors, including Libby Appel, who published her memoir, *Dancing with GIs*, while a resident. Another resident, Dr. Henry Marcellus “Marc” Cathey had been the Director of the U.S. National Arboretum. Many teachers have made The Pines their home, including Phyllis Gore Houghton, who recounted some of her best teaching stories in *The Pinepost*.

Some residents, such as David McCord, have deep ties to the North Mecklenburg area.

People obviously liked what The Pines was offering. Mary Anna Bode, who arrived in April 1989, recalled “moving vans on top of moving vans. The place just began to fill up as fast as they could get people in.”

In eighteen months—a year and half ahead of schedule—the community was full. With more income coming into the facility, The Pines could now begin to add amenities.

Early on, Mrs. Workman lobbied for a piano. “I said, I want a good piano so good people will entertain us,” she recalled. A committee chaired by Jim Swisher, a Davidson College music professor, helped choose a Yamaha grand piano.

Mr. McCord was raised on a family farm that is now Huntersville's Northstone Country Club and he was born in a house on ground that is now the second tee. Another resident, Oni Wilson, ran a marina in Mooresville. But he was widely known for the summer vegetables he sold from a stand in his front yard, and later at The Pines.

A few residents arrive at The Pines and rediscover people from their past. One resident was surprised to find a woman she had known when they were both girls in Alabama. They had not seen each other for sixty-five years. One man realized his Pines neighbor was the examining physician who had pronounced him fit for the army some fifty years earlier.

Sometimes, The Pines becomes home not just to couples but to multiple family members—siblings, or a parent and adult child. Once in a while, people arrive at The Pines to discover new love and, in several cases, new spouses.

One couple, the Reverend Lawrence and Marjorie Stell, even held their wedding in the Davidson Room, inviting every resident and staff member. Also in attendance were their families, including several great-grandchildren.

Finding true love is not guaranteed, of course. A surer bet is that newcomers will find many new friends among residents and staff. When surveyed about what they like best about The Pines, residents' most frequent answer is always the same: the people.



Resident Elizabeth “Libby” Appel, an author and former college instructor, has played the piano at many Pines gatherings.

“Having our new piano is an opportunity for us to do something for Davidson College, which has done and continues to do so much for us,” Mrs. Workman wrote in the August 1989 *Pinepost*, the newsletter that residents had launched earlier that year. “We can give their music department a stage and an eager audience for their many talented people who enjoy performing.”

Little by little, landscaping also took shape. Nearly every Friday, Mr. Holthouser and his staff would plant more trees and shrubs. Their progress was thwarted temporarily in September 1989, when Hurricane Hugo hit Charleston, South Carolina, traveled more than two hundred miles inland and left The Pines’ grounds strewn with fallen trees and debris.

Generators kept the Health Center going, but electricity was knocked out for days in apartments and cottages. Residents coped. When the sun set in the evenings, Miss Bode recalled, she and neighbors would pull tables and chairs into the hallways, which had generator-powered lights. There, they would socialize, read, and play cards.

Once Mr. Holthouser and his staff cleaned up from Hugo, they resumed their planting. By June 1990 Mr. Muller was able to report to the Board of Directors that landscaping “in less than two years has brought us from bare, rough terrain to the planting of more than two hundred trees and a thousand shrubs, and beautiful lawns.” “A corresponding maturity,” he added, “exists in the development of employees, and the harmonious interaction of the Residents’ Association committees.”

*Resident Annette Kreider
wears a hand-knitted
Davidson Wildcats vest.*



NEW TRADITIONS, NEW AMENITIES

✧ Though it reached capacity early on, The Pines evolved over the next decade, making changes and adopting traditions that have endured.

In those first years, Rev. Cecil and Marjorie Lawrence entertained new residents in their cottage, serving tea and cookies on Sundays. Resident Vera Morrison became The Pines’ unofficial photographer, snapping pictures at birthdays and other special events, creating scrapbooks that residents still enjoy. Fans of Davidson College basketball began attending games as a group, with some wearing red and black sweater vests fashioned by the knitters among them. Mrs. Lawrence designed and knitted the message on the front of each one: “Pines People for Davidson Wildcats.” Those vests have been passed on to other residents, who continue to wear them at games.

Bridge quickly became a passionate pastime, with residents organizing weekly duplicate bridge games and bridge marathons. Canasta was another popular game, and on Wednesday nights, men gathered for penny-ante poker.

Every spring, gardening enthusiasts planted tomatoes, squash, beans, melons, flowers, and more on a plot of land on the east part of campus. Resident Duncan McBryde erected a sign reading, “We don’t grow old. We grow tomatoes.” That garden plot was sacrificed for the Cedar Court cottages in the late 1990s, but The Pines created a new plot on the south-west part of campus.

In 1991 Mr. Rainey negotiated a twenty-year deal that would give all residents membership in the River Run Country Club, which had recently opened about four miles southeast of The Pines.

Two golf-loving residents, Bob Kizer and Pete Kreider, helped raise funds to buy the \$15,000 corporate River Run membership. Many residents contributed to the cost of the membership. Under the agreement,



Pines residents enjoy cheering the Davidson College basketball teams. (Photo courtesy of Davidson College)



During the summer of 1996, resident Mary Kelton shows off her vegetable garden harvest. The sign was made by resident Duncan McBryde. (Photo courtesy of John Kelton)

BRIDGE

The Pines has no official religion, unless, as one resident once quipped, you count bridge.

People at The Pines have been playing bridge almost from the day the place opened in 1988. A bridge marathon tournament starts in September and can run until May. But on almost any day, there is a bridge game in a resident lounge or in someone's apartment.

It is easy to see the popularity. Bridge is complicated enough to be an intellectual challenge, but with four players, it also provides a social occasion. And like chess, it can be enjoyed by beginners as well as master players.

Most Saturdays, you can find some of The Pines' best bridge players in a third-floor lounge that is the home of duplicate bridge games. In these games, the same bridge hand is used at all tables, reducing the element of luck and allowing players to compare how they fared. These are The Pines' most serious games, played in near silence, save for the snapping sound of cards being pulled from hands and placed on tables.

The Pines has been home to a number of skilled players, but none better, Pine bridge players say, than Foy Ingram. Miss Ingram launched duplicate bridge at The Pines in 1989, then ran the program for years. In 2010, she finally decided it was time to cut back on her bridge playing. So she dropped out of the duplicate bridge games, but continued in twice-a-week bridge foursomes. At the time, she was just shy of 107 years old.



Resident Foy Ingram, a retired government administrator, has been among The Pines' most talented bridge players.

any resident could use River Run facilities, including the outdoor pool, tennis courts, dining room, and, of course, the golf course. Years later, residents contributed again when the twenty-year membership expired, extending it for fifteen more years.

Mr. Kizer died before he could see the efforts completed, but in 1992 The Pines hosted its first annual golf tournament at River Run, named

LEARNING IN RETIREMENT

Nearly every week during the school year, dozens of residents gather in the Davidson Room for a Monday morning event that is a cherished Pines tradition: the Learning in Retirement program.

Learning in Retirement calls on Davidson College professors to share their expertise on all manner of subjects—Chinese politics, Pompeii, genomics, Shakespeare, cognitive training for older adults. It is a lively gathering, with residents contributing astute remarks and questions.

Resident Sarah Tietze launched the program in the mid-1990s, becoming the first chair of the Residents' Council Learning in Retirement Committee in 1995.

The program later became identified with Louise Nelson, who ran it for more than a decade. Dr. Nelson, a retired economics professor, was the first woman awarded tenure at Davidson College. No-nonsense and firm, she would line up speakers by buttonholing them on the college campus. She used to boast, resident Sam Maloney said, that she had never had a professor turn her down. "She really kept it at a high intellectual level," said resident John Monahan, who served with her on the Learning in Retirement Committee. "She did an excellent job."

Dr. Nelson ran the program until her death in 2009 at age ninety. Since then, a committee of six residents, all men, has carried on Dr. Nelson's work of organizing the popular weekly lectures. The joke around The Pines, often passed on by female residents, is that it took six men to replace Louise Nelson.



Louise Nelson.

the Robert E. Kizer Memorial Golf Tournament. Its goal was to raise money for the Resident Support Fund, which provides financial assistance to Pines residents who have outlived their resources.

Another Pines' tradition got its start in the early 1990s: the Learning in Retirement program. Launched by resident Sarah Tietze, it brought in Davidson College professors to lecture on a wide range of topics.

Residents also found ways to give back. Some volunteered in the Health Center, regularly visiting with its residents. Libby Appel played piano for birthdays and Jetton Deferred Giving Society dinners. Annette Kreider also entertained Health Care residents with her piano music and managed to make money for The Pines at the same time. Because her husband, Pete, had worked for Exxon-Mobil, she qualified for an Exxon-Mobil employee matching gift program. The company contributed to The Pines as a result of her volunteer hours.

Community members, too, offered valuable support, lending a hand with activities, visiting with Health Center residents, helping with Sunday School and vesper services, and much more. Volunteers have included Davidson College professors, such as Richie King and Larry Cain, who have led Bible study sessions since The Pines opened, and many local residents, such as Hugh and Brenda Barger, who have organized regular bingo games in the Health Center. Today, more than one hundred community members continue to volunteer.

GROWTH AND IMPROVEMENT

✧ In July 1991 the Pines' management agreement with The Charlotte-Mecklenburg Hospital Authority expired as scheduled, and Mr. Muller and his staff assumed full control. That same month, administrators retired eight million dollars of the twenty-four million dollars in construction bonds. Later, they refinanced at a lower interest rate. Not long after that, the facility launched its own in-house food service, replacing the outsourced operation. The move, which saved money and improved

quality, was one of a series of Board decisions to invest in The Pines and its people instead of relying on outside contractors.

By the early 1990s administrators were finding that most prospective residents wanted larger apartments. Responding to those preferences, The Pines over the next several years combined eleven one-room studio and deluxe studio apartments with adjacent one-bedroom apartments to create larger living accommodations.

In mid-1993 the community added ten

A cottage on Mulberry Court.



cottages to the twenty-six that had been built prior to and just after opening. In late 1997 and early 1998 it added eight more, giving the community forty-four cottages. These cottage additions were important steps, because they provided more economies of scale and contributed to financial stability. At the same time, The Pines kept an inventory of smaller studio apartments to ensure residents had more affordable options.

The early 1990s also saw the addition of new neighbors who constructed homes along Avinger Lane, the entrance-way leading from Pine Road to The Pines. That Avinger Lane would become an attractive roadway lined with stately homes on large wooded lots was the result of efforts undertaken in the late 1980s, when Pines Directors Bob Avinger and Lawrence Kimbrough recognized the importance of protecting the beauty of the approach to the site of The Pines. The land along Avinger Lane was owned by the same family group from whom The Pines purchased its original tract. Dr. Avinger and Mr. Kimbrough contacted the family group about securing all of this land as a gift for The Pines.

After extensive discussions, the family group agreed to donate to The Pines a 20% interest in the property fronting on Avinger Lane and containing thirty-six acres as a charitable gift, provided Dr. Avinger and Mr. Kimbrough found a buyer for the remaining 80% interest. In order to secure the charitable gift for The Pines and to assure the entranceway was developed in an attractive and appropriate manner, Dr. Avinger and Mr. Kimbrough purchased the other 80% interest in the property, forming a partnership between them to hold such interest. The partnership adopted appropriate residential restrictions, paid all of the development costs for survey, engineering, water, and sewer, and divided the property into more than a dozen residential lots which were eventually sold for home sites. The acquisition of the property had not been undertaken to benefit Dr. Avinger and Mr. Kimbrough financially, and it did not result in such a benefit. But thanks to the efforts of the two founding directors, the acquisition and development of the property did result in The Pines receiving over \$123,000 from the proceeds of lot sales reduced only by closing costs, having made no financial investment. More importantly, the entranceway leading to The Pines is now lined by attractive homes and shaded woods.



Lawrence Kimbrough, who played a key role in creating The Pines, has served on its Board of Directors since it was established, as both member and Chairman (1993–1996). Here he is pictured with his wife, Tish.

The Board voted to create a fund with the money to offset the resident fee increase for 1996—a use that would benefit all residents.



A LAWSUIT—AND A VICTORY

✂ From its inception, The Pines was a nonprofit corporation. But was it also a charitable organization for tax purposes?

The answer, to most anyone associated with The Pines, has always been yes, of course. But when the community tried to obtain a refund of North Carolina sales taxes paid on purchases of construction materials, the North Carolina Department of Revenue rejected the claim, contending that The Pines was not a charitable organization. That was wrong, Pines officials believed. In December 1988 the Board voted to file a claim for refund with the Department of Revenue.

To litigate the case, The Pines retained one of Charlotte's most highly regarded lawyers, Russell Robinson of Robinson, Bradshaw and Hinson. At the time, Mr. Robinson was serving on the Board of Southminster Retirement Community, a continuing care retirement community in south Charlotte. Like The Pines, Southminster was a church-affiliated nonprofit organization that had also been denied a sales tax refund when the state decided it was not a charitable organization.

Following a conversation with Mr. Rainey, Mr. Robinson agreed not only that his firm would take the case, but would do so on a contingency basis. This meant he would be paid only if he prevailed in court. He asked that The Pines allow Southminster to become co-plaintiff.

Mecklenburg Superior Court Judge Shirley Fulton heard the case in July 1993. The state argued that the two retirement communities were not charitable organizations because the "financial and health limitations required for admission prevent [the communities] from benefitting a significant segment of humanity."

Pines administrators felt otherwise. They pointed out that in 1990, 75 percent of U.S. residents aged sixty-five and up owned their own homes. With home ownership and a modest amount of fixed income, many retirees could afford The Pines.

There was a larger issue, as well. In arguing the case, Mr. Robinson contended that under English law going back to the Statute of Elizabeth in 1601, charity has had a meaning beyond just the relief of poverty. He called Mrs. Elizabeth Cumming as his principal witness at the trial to give factual support to that legal argument.

In a March 1994 decision, Judge Fulton rejected the argument that The Pines and Southminster were charitable organizations. Officials from

the two institutions, believing strongly in their charitable mission, opted to appeal her finding.

The North Carolina Court of Appeals heard the case in April 1995. In his written brief and oral argument, Mr. Robinson quoted the moving testimony of Mrs. Cumming at the 1993 trial and gave it major credit for inspiring his argument. Years earlier she had also helped inspire The Pines' founders, making a case to Presbyterians for building The Pines as a charitable endeavor, noting that "there are many kinds of poverty and they are certainly not all involved with dollars and cents." She went on to describe the poverty of aging—the slipping away of sight, hearing, and memory.

The Court of Appeals ruling, issued in August 1995, was a total victory for The Pines. In a twelve-page opinion, the appeals judges reversed Judge Fulton's finding and ruled that The Pines was indeed a charitable organization under North Carolina law for purposes of being exempt from the sales tax.

Writing for a three-judge panel, North Carolina Court of Appeals Judge John Martin pointed out that the North Carolina Department of Revenue had previously recognized that The Pines was a charitable organization for purposes of exempting the institution from state corporate income tax. And the ordinary meaning of "charitable," he found, is broad enough to include aid and assistance provided for the elderly or infirm without regard to individual poverty. The Pines, he wrote, is "clearly engaged in an humane and philanthropic endeavor to aid and assist the rapidly growing class of elderly citizens of this State, and their activities certainly benefit the larger community."

The case set an important precedent, winning for all of North Carolina's continuing care retirement communities an exemption that stands today.

In December 1995 Mr. Robinson and his law partner, Louis Bledsoe III, attended The Pines' Board of Directors meeting, where they announced that The Pines would receive a net sales tax refund from the State of North Carolina in the amount of \$714,506. Mrs. Cumming, the woman with the inspiring and persuasive argument, was on hand to receive it on The Pines' behalf.



Mrs. Betty Cumming addresses The Pines Board of Directors after the NC Court of Appeals rules that The Pines is a charitable organization. Russell Robinson looks on.

Detail from an April 1996 Pines newsletter.



Willis J. "Bill" Hidell chaired The Pines' Board of Directors from 1991 to 1992. (Photo courtesy of Willis J. "Bill" Hidell)

Afterward, the Board voted to create a fund with the money to offset the resident fee increase for 1996—a use that would benefit all residents. The Board decided to name this fund in honor of their outgoing Board Chairman, Bill Hidell. Mr. Hidell was one of the few Board members with no ties to the town of Davidson or Davidson College. It was Board member Bill White who had invited him to join. Mr. White's timing was perfect: Mr. Hidell had recently sold his Charlotte businesses and was looking for ways to contribute to the community.

Since joining the Board, Mr. Hidell had contributed both money and expertise to The Pines. The Peggy and Bill Hidell Nursing Unit recognized the Hidells' help in building the facility. And Mr. Hidell had served on the Board before The Pines opened. Now he was rotating off, and his Pines friends wanted to honor his service. They had invited Mr. Hidell's wife, who showed up with one of their friends to surprise her husband. "I had no idea why they were there," he said.

Mr. Hidell recalled feeling honored—and relieved that the case was over. "I knew we were going to win the case," he said, "because the state was totally wrong."

D. Craig and Maryetta Purcell cut the ribbon in 1992 as The Pines celebrates the completion of the porte-cochere for the Schramm Health Center.

A TRADITION OF GIVING

✧ Generous giving had created The Pines, with donors contributing more than two million dollars toward construction. Almost from the day it opened its doors, new residents continued that philanthropic tradition.

One of The Pines' first gifts from a resident arrived unexpectedly one afternoon. D. Craig Purcell appeared at Mr. Rainey's office door, apologizing for taking his time. Then he handed over a \$3,000 check for the Resident Support Fund. "I remember thinking, 'This fundraising stuff's kind of neat,'" Mr. Rainey recalled.

Other residents also stepped up when they saw a need. By mid-1990 residents had donated a twenty-seven-passenger bus (especially





RESIDENT SUPPORT FUND

Since the day it opened, The Pines' Resident Support Fund has assisted residents who have outlived their financial resources. The fund has been made possible entirely through contributions from residents, board members, and friends, especially in the form of memorial gifts.

Thanks to this generous support, the Fund has grown from about \$225,000 in 1988 to nearly \$2.4 million at the end of 2008 and now includes more than thirty subfunds named in honor or memory of individuals. In addition, The Pines has raised several million dollars through its *Preserve and Progress* campaign that may be used for the fund.

The financial assistance is meant for residents who have depleted financial resources for justifiable reasons, perhaps because they spent significant time in health care or experienced a financial setback beyond their control. The Fund provides residents with peace of mind, knowing they will not have to find another care arrangement at such a vulnerable time, said Kathy Pilkington, who heads the Board of Directors' Development Committee.

Over the years, the continuing care retirement community has used the Resident Support Fund to help as many as four residents at once. With about 350 residents, The Pines has resources to support 1.1 percent of all residents. The Pines continues to raise money for the Fund, "because as time goes on, we realize we will need to help more people," Pines' Chief Financial Officer David Rainey said. "We're going to do our very best to never ask anyone to leave due to an inability to pay."

After opening, The Pines also created an Entry Assistance Fund to help those who want to become residents but do not meet entry fee requirements. The Pines continues to raise money for this Fund, which is meant to benefit elderly community members who have led lives of service but have not accumulated assets necessary to cover entry fees. The Pines seeks to raise two million dollars for this Fund.

equipped for people with physical limitations), an overhead video projector, a pool table, a wide-screen television, and more.

And in 1992, Mr. Purcell and his wife, Maryetta, donated funds to build a porte-cochere for the Health Center. The covered entrance had been cut from the original budget because funds were tight. But one rainy day, Mrs. Purcell noticed a Health Center resident in a wheelchair getting soaked while being moved to a waiting car. At that point, she decided to make the project happen.

Soon, administrators realized The Pines had a need that was likely

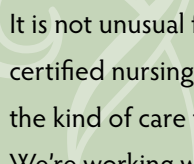
A TRADITION OF CARING

*"Now that I am recovering from my recent accident, I feel I must tell you
how pleased I am with the care that I have received."*

—from a resident

*"Mom is receiving loving and caring attention. I couldn't be
more pleased with the way she is being taken care of."*

—from a family member



It is not unusual for Schramm Health Center staff to receive comments like these. The nurses, certified nursing assistants, therapists, and other staffers pride themselves on delivering the kind of care they would want their own family members to receive. "This isn't just a job. We're working with and for a family," said Kaye Yarborough, The Pines' Registered Dietitian.

To deliver that high-quality care, the Health Center maintains a staffing level that is nearly double minimum requirements. The staff works to meet specific objectives, such as exceeding state and national averages on key indicators measuring quality of care. A Continuous Quality Improvement Committee, which includes The Pines' Medical Director, monitors the operation. Each year The Pines surveys residents and their family members to uncover any areas that may need improvement.

Schramm Health Center residents also enjoy the same meals—and the same wide variety of entrees—as independent living residents. Mrs. Yarborough makes sure residents in the Schramm Health Center get the nutrition they need, which greatly contributes to their health.

The Health Center has been expanded and improved since it opened in 1988. The first expansion, completed in 1996, created a larger dining room and the Purcell Wing, a separate memory-care unit that included its own dining room, activity room, and enclosed courtyard.

The latest expansion, completed in 2008, added beds in assisted living and nursing care, made all rooms private, and enhanced common areas.

too big for any single donor: a separate unit in the Health Center for residents with dementia. To build it, they needed a full-fledged fundraising campaign. The Pines' Health Center had opened with nursing beds and assisted-living beds, but had no special area for people with memory impairment.

The lack of such an area had created difficulties when residents sometimes became disoriented and wandered into their neighbors' rooms. In 1991 The Pines addressed the problem by reorganizing the Health Center, moving residents with dementia to a single wing that was locked for their safety. It was an improvement, but "the administration saw that was a Band-Aid on the bigger issue," said Amy Smith, who became The Pines' first recreation therapist in 1992.

Historically, long-term care facilities had used drugs and restraints to minimize behaviors such as wandering and agitation among people with serious memory impairments. By the early 1990s "the entire industry was getting away from that approach," said Dr. W. T. Williams, Jr., a founding Board member. Instead, they were creating special units or free-standing facilities that could tailor care to the needs of individuals with dementia.

In late 1993 The Pines launched The Campaign for A Growing Pines to raise one million dollars. The money would renovate and expand the Health Center, adding a larger dining room and a memory-care unit complete with its own dining and activity room and enclosed courtyard. Some contributions would also go to the Resident Support Fund.

By September 1995 the campaign had exceeded its goal, with most contributions coming from residents, staff, and Board members. For the June 4, 1996, dedication, Health Services Director Sharon Sells wrote that when residents saw the expanded Health Center dining room flooded with natural light, their faces "came alive, spirits soared and continue at a new high." And when residents moved into the new memory-support unit, she wrote, "a whole new sense of serenity came about." At the close of the campaign, The Pines named the Health Center in honor of the woman who had contributed a leadership gift that assured the effort's success: Mariam Coltrane Schramm.



W. T. "Bill" Williams, Jr., a physician who is a founding partner of The Davidson Clinic, has served as a member of The Pines' Board of Directors since 1988 and as of 2011, is Chairman of the Board.



Mariam Coltrane Schramm.



BEST FRIENDS

By the time people move to retirement communities, they often feel their circle of friends is shrinking, not growing. But sometimes, as Mildred Workman discovered, life surprises you.

Mrs. Workman, one of the early Davidson volunteers responsible for bringing The Pines into being, was also one of its early residents. About a month after she and her husband, Gaty, moved in, she met a new resident named Mariam Schramm. A pitcher of flowers first brought them together.

Mrs. Workman spotted jonquils on a table outside The Pines' dining room and learned they belonged to Mrs. Schramm. Mrs. Schramm had recently moved to The Pines from her home in Concord. A widow, she had heard about the new community from her banker, Lawrence Kimbrough, a Pines' Board member and founder.

Mrs. Workman asked her if she could borrow the arrangement as a centerpiece for her book club meeting. Mrs. Schramm loaned the flowers, then appeared at Mrs. Workman's door a few days later with a gift—that pitcher, filled with more jonquils.

As they talked, the two women learned they shared a passion for bridge. Soon they were playing regularly and entertaining together. Mrs. Schramm had no children close by, so the Workman family became her family too. When Mrs. Schramm stopped driving, Mrs. Workman played chauffeur. And when Gatewood "Gaty" Workman died in July 1995, Mrs. Schramm was by Mrs. Workman's side.

Mrs. Schramm had moved to The Pines from her home in Concord. A widow, she had heard about the new community from her banker, Mr. Kimbrough. Mrs. Schramm was a member of Concord's prominent Coltrane family, whose members had founded Concord Telephone Co. and Concord National Bank, which later became First Charter Bank. She supported many causes, but she preferred to give anonymously. Her goal was to help people.

When Mrs. Schramm gave a substantial gift for the Health Center campaign, friends had a hard time convincing her that it should be named in her honor. They finally succeeded by convincing her that nam-

Months later, Mrs. Schramm honored her friend in a very special way. One day shortly before Christmas, Pines' Executive Director Eddie Muller stopped by Mrs. Workman's apartment with big news. An anonymous donor had made a gift to build a wellness center at The Pines, complete with a warm water therapy pool. The donor wanted the center named for Mildred Workman.

It was obvious, Mrs. Workman said, that Mrs. Schramm was the donor. It was just like her friend not to want publicity for her giving. Mrs. Workman later learned that Mrs. Schramm had planned to spring the news before Mrs. Workman's first Christmas without her husband "because she thought it would make me feel better."

Mrs. Schramm was hospitalized in October 1999. For three months, Mrs. Workman drove every morning to Concord to visit her. She died on December 21, just days before the start of the new millennium.

Years later, Mrs. Workman spoke of Mrs. Schramm with deepest affection. "We just loved each other," she said. "That was something we hadn't expected, any of us—that we would make such close friends."



Mariam Coltrane Schramm and Mildred Workman. (Photo courtesy of Mildred Workman)

ing the Health Center in her honor would help inspire others to support The Pines, recalled Mrs. Workman, her close friend.

Even after Mrs. Schramm agreed to have the Health Center named in her honor, she fretted about what she should say if people thanked her for the gift. "Just say 'You're welcome,'" Mrs. Workman replied.

Like Mrs. Schramm, Craig and Maryetta Purcell never sought recognition while supporting The Pines throughout its early years, strengthening its services and improving its facilities. The Pines named the Purcell Wing, the new unit for residents with memory impairment, in honor of the couple who provided the generous campaign gift.



D. Craig and Maryetta Purcell.

Mr. Purcell, who grew up in Salisbury, met Maryetta, a music teacher from South Carolina, after serving in Europe and North Africa during World War II. He opened several drug stores in Salisbury and nearby communities, but eventually sold the stores, invested the proceeds, and spent the rest of his career managing his portfolios. The couple moved to a cottage at The Pines in 1989.

ONE CAMPAIGN ENDS, ANOTHER BEGINS

✧ Until The Pines opened, its volunteer Board members were its primary fundraisers. To run the Health Center expansion campaign, the institution had hired Ketchum Inc., a fundraising consulting firm. But Pines leaders realized they needed an ongoing development program, so when the Health Center campaign ended, they hired their first development director, who raised money for various continuing needs, including the Resident Support Fund and Entry Assistance Fund. Soon they were ready to start another campaign.

The Residents' Council had noted that the addition of warm water and hot water therapy pools would help many residents who suffered with arthritis, stroke, or paralysis. The Council also said that these pools would help sell The Pines to prospective residents.

The Pines' Board agreed, this time launching a three-million-dollar campaign to build a Wellness Center, install the pools, and create a fund that would pay for operating costs. "We realized it was an important therapeutic tool for our residents," Mr. Rainey said.

Again, residents and supporters opened their wallets. Again, Mrs. Schramm gave generously. This time, she asked The Pines to name the Wellness Center in honor of Mrs. Workman, her good friend. Mrs. Schramm tried to make her gift anonymous, but Mrs. Workman realized immediately that Mrs. Schramm was the mysterious benefactor.

The Pines dedicated the Mildred T. Workman Wellness Center on December 8, 1998. The new facilities were an immediate hit. With a well-



REPRESENTING THE RESIDENTS

The Pines Residents' Association took shape just months after the community opened. In January 1989 residents gathered in the second-floor living room to elect their first Residents' Council—the officers and committee chairs who would serve as their representatives.

That first year, under the leadership of the late Ralph Glenn, the Council launched white elephant sales and movie nights. Volunteers began loaning out books through a resident-run library. Soon there were bridge games, coffee and Kahlua nights, as well as monthly birthday celebrations.

Over the years, the Residents' Association has helped shape The Pines in large and small ways. It collects thousands of dollars from residents for an annual Christmas Tip Fund for employees. Flowers that grace public areas are the work of the Flower Committee, which displays donated arrangements. Another committee organizes volunteers to work in a variety of nonprofit groups around town. Yet another raises thousands each year through greeting card and white elephant sales. With that money, the Council purchases items that benefit residents and gives to worthy causes, including the Resident Support Fund. The President of the Residents' Association also attends meetings of the Board of Directors.

Representing the residents, Council members communicate with administrators, sharing concerns when they see a problem and making suggestions when they have an idea for improving The Pines. The creation of the warm water and hot water therapy pools, the telephone-based emergency call buttons in apartments, additional sidewalks, the no smoking policy, and second handrails in hallways are some projects suggested by the Association and implemented by The Pines.

These accomplishments show the Association's impact. In addition, "it is the spirit of cooperation between the residents and The Pines leadership that has created an atmosphere of harmony and togetherness," Pines' Executive Director Eddie Muller said. "It's been a truly great relationship."



Warm water therapy pool.



Hot water therapy pool.

ness clinic staffed by a registered nurse, residents did not need to go far to get blood work, ask about medications, or check their blood pressure. They could also visit the Center for a variety of health services offered by outside providers, including mobile dentistry, audiology, and podiatry. And they could exercise in the new fitness room.

But the biggest hit among these new amenities? The warm water and hot water therapy pools. A gently sloping ramp made it easy to get in and out of the water. A high-end filtration system ensured superior water quality, and a ceramic tile floor created a nonslip surface.

The depth of the warm water therapy pool was perfect for water aerobics classes, thanks to an extra effort from Pines staff members. By consulting Duke University exercise physiologists, Pines management learned that pools used for water aerobics classes should ideally offer a range of depths so class members could stand in chest-high water for some exercises and shoulder-high water for others.

But how deep would that be? To get the depth right, Pines staff spent several hours one day measuring the chest and shoulder heights of residents as they came to the dining room for lunch and dinner. Mr. Rainey recalled one resident quipping: “Do you want my chest height from where it is now, or from where it used to be?” When the warm water therapy pool opened in June 1999, residents flocked to water exercise classes.

“THERE WERE STRONG TIES”

✧ As the twentieth century came to a close, The Pines was thriving. It had added services and amenities and successfully completed several fundraising campaigns. The place had stayed full ever since it achieved full occupancy in 1990, and it had done so mostly by word-of-mouth referrals. Most importantly, inside the building, residents of The Pines had developed a culture of caring.

THE PINEPOST

If you want to experience the personality of The Pines, spend an hour leafing through issues of *The Pinepost*, the resident newsletter that has been published almost since The Pines opened.

Over the years, the bi-monthly newsletter has sometimes served as a source of news. But mostly, it's chock full of anecdotes and stories. Residents recall how they met and fell in love with their spouses and describe unforgettable visits to far-off countries. Veterans write about serving during World War II. Retired teachers recount poignant stories of former students.

Childhood escapades are another popular topic. J. B. Stroud once nearly scared his mother to death when, as a ten year old, he took to the air in a friend's two-seater airplane. Spotting his mom on the ground, he shouted: "Hey, Mama!," prompting her to drop the groceries she carried.

The Pinepost often reveals fascinating adventures. In one issue, we learn about three early residents and their visits to Egypt: Elizabeth Woods climbed the largest of the Great Pyramids, Frances Barrier fell off a camel, and Louise McMichael Martin, having been separated from her travel group, hitched a ride with a motorcyclist to find them.

In some issues, you will find limerick contests, residents' poems, and book reviews. And of course, there are numerous stories of beloved animals, including Noony, the Shetland sheep dog; Sissy, the dachshund; and Samantha, a box turtle, who became so comfortable with one Pines couple that she ate from their hands and rapped on their glass door to get attention.

The Pinepost, said Cary Johnston, a resident and former editor of the publication, is "a way for people here to tell their stories to each other." It is also an enduring snapshot of the interesting, varied, and talented people who call The Pines home.



THE FIRST CENTENARIAN

On December 23, 1992, Parker Terhune made a bit of history at The Pines, becoming the first resident to turn one hundred.

Mr. Terhune grew up in New Jersey, where he worked in a variety of careers, including that of a county recreation director. He also volunteered with his hometown YMCA for fifty years, where he became known as “the grandfather of swimming instruction” after teaching swimming, lifesaving, and first aid to countless students.

But at The Pines, Mr. Terhune called himself the man with the treasure chest of friendships. Along with the many friends he made at The Pines, Mr. Terhune had pen pals from around the world, recalled Mike Holthouser, The Pines’ retired Director of Plant Services.

Mr. Terhune wrote about one of those pen pals in a 1993 issue of *The Pinepost*. She was a teenager from his New Jersey hometown who had gained national attention for leading an effort to ban plastic trays in her school cafeteria. “I was so elated that my little town of West Milford had gained national attention,” he wrote, that he sent the girl a letter “expressing my appreciation for her efforts in launching a campaign to clean the environment.” That letter sparked a friendship. Before long, the young woman was referring to Mr. Terhune as the grandpa she had never had.

That is the kind of man Mr. Terhune was. “He had a kind word for everybody,” Mr. Holthouser said. “He was one of my favorites.”

Mr. Terhune died in 1998 at 105. A couple of years earlier, his daughter and son-in-law, Betty and John Krider, had moved from their Huntersville home and joined him at The Pines.

Since Mr. Terhune’s milestone, numerous Pines residents have celebrated their hundredth birthdays. That should not be surprising. People eighty-five and older are now the nation’s fastest-growing age group.

Longevity gets attributed to many things—good genes, faith in God, even a daily cocktail. Mr. Holthouser still remembered Mr. Terhune’s explanation for his own long life: He drank clean water, ate fresh vegetables, and collected friends.



Parker Terhune with Eneshal Bullard.

“The feeling of community came quickly,” said Miss Bode, who knew no other residents when she moved to The Pines from Maryland in 1989. “I went down to health care almost every day, visiting friends. Many of us spent an enormous amount of time down there. People did wonderful things for each other,” she recalled. “There were strong ties.”

During those first years, The Pines said a final goodbye to beloved friends who had played pivotal roles in its creation, including the Cummings and Mrs. Schramm.

At the same time, it welcomed new residents. These newcomers would not have to deal with the red-clay landscape, the outsourced food service, the limited activities, and other inconveniences endured by early residents. Instead, they would enjoy the benefits that those first pioneering residents helped make possible.

The Pines has no official religion. Unless, as one resident once quipped, you count bridge.



CHAPTER THREE

*Striving to Preserve
and Progress*





*An aerial shot of The Pines at Davidson
and nearby Lake Norman.*

AS THE TWENTY-FIRST CENTURY BEGAN, the American economy was booming, especially in North Carolina. Newcomers were flocking to Charlotte and surrounding towns faster than local governments could build schools for their children.

Even the little college town of Davidson, which had worked to moderate development, watched its population swell. The town grew from about four thousand in 1990 to more than seven thousand by 2000, an increase of about 76 percent. New neighborhoods emerged from farmland. Additional restaurants and stores opened to serve a burgeoning clientele. Two new hospitals, in nearby Mooresville and Huntersville, had also opened to offer medical care.

In this prosperous climate, more seniors were looking for retirement communities that offered high-quality accommodations. They wanted appetizing, nutritious meals, wellness and fitness activities, and assorted amenities. Many also did not want to downsize drastically.

In the late 1990s, a new continuing care retirement community had opened in south Charlotte. It offered facilities and services aimed at meeting market preferences, such as two-bedroom units, covered parking, and private nursing rooms. And the new retirement community was selling well.

It was in this environment that Pines' Board members decided it was time to take stock and plan for the future. The Pines was in good shape. In fact, a 2001 issue of *Where To Retire* magazine featured The Pines as an example of a hot trend—a retirement community linked to a college campus.

But Board members wanted to make sure the continuing care retirement community stayed current. "The world keeps moving under your feet," said Zack





Lake Norman.



SIX KEY GOALS AT THE PINES AT DAVIDSON

The *Preserve and Progress* strategic plan, established by The Pines' Board of Directors, identified six measurable goals:

- To maintain exceptional, up-to-date, quality facilities and services.
- To continually develop and retain a caring, talented, and loyal team.
- To have truly delighted residents who are The Pines' best ambassadors.
- To nurture and foster strong community relations.
- To maintain financial stability.
- To be the unquestioned continuing care retirement community of choice.

Zapack, who was Board chair in 1999. "You don't get to the top of the world and stay there." Under Mr. Zapack's leadership, the Board agreed to develop a strategic plan to guide The Pines for the next decade.

Board member Ron Norelli, who led the planning effort, was well suited for the task. As President, Chief Executive Officer, and founder of Charlotte's Norelli & Company, he had spent years advising and leading companies through periods of change. Mr. Norelli, a certified turnaround professional, rescued companies in financial distress, but also worked with healthy companies, using his experience with troubled companies to help healthy clients avoid similar pitfalls.

To launch the planning process, management surveyed residents and employees, interviewed townspeople, and analyzed the market. In December 2000 Board members approved a planning document, calling it *Preserve and Progress*. The document laid out six key goals and described the measurable objectives needed to meet each of them.

What set The Pines' plan apart from those of other continuing care retirement communities was the set of measurable objectives the Board of Directors established for each of the six goals. The objectives were used to determine if management was achieving those goals. Since they were designed to be measured, "it is very clear whether or not they are being met, which is helpful to all parties," Eddie Muller said.



SURVEYING FOR SATISFACTION

The dining room was too noisy. That message came through clearly in 2000 when The Pines conducted its first resident survey. Only 43 percent of residents said they were satisfied with the dining room's noise level. Out of 177 close-ended questions, that one ranked lowest in satisfaction.

Since 2000 satisfaction surveys have become regular events at The Pines. Administrators survey residents in independent living, assisted living, and nursing care. They also survey employees and future residents.

Once results come in, The Pines puts them to use. After administrators noted the dissatisfaction with dining room noise, they consulted an acoustical engineer and made improvements. Similarly, when nursing residents complained about food being served cold, the culinary director implemented a new system to keep meals hot. In both cases, The Pines used subsequent surveys to measure how much the changes had boosted satisfaction.

The surveys are valuable in other ways, too. Administrators compare The Pines' results against those from the larger retirement community industry. Employees' satisfaction with management, pay, and benefits, for instance, consistently ranks above state and national benchmarks. The results also allow Pines administrators to see if they are achieving the goals laid out in the community's long-range plan, known as *Preserve and Progress*.

One example: The quantifiable objective used to measure The Pines' goal of maintaining exceptional, up-to-date facilities and services. It sets a minimum target rating of 97 percent for Mecklenburg County Health Department sanitation inspections.

The plan also set an overriding goal for The Pines: to be the best continuing care retirement community in the Southeast and the retirement community of choice in Davidson and the surrounding area.

To achieve that goal, Board members decided they needed to make a variety of improvements—enlarging the dining room and kitchen and

expanding numerous areas, including the Davidson Room, the library, and the arts and crafts room. In addition, they would increase the number of assisted living and nursing beds and convert four semi-private nursing rooms, a move that responded to residents' requests.

Management also wanted to satisfy the desires of future residents, and they found approximately 85 percent of those surveyed preferred a retirement home with at least two bedrooms. At the time, only 41 percent of The Pines' total independent living units had two bedrooms.

So they decided to add more two-bedroom units. Administrators first proposed more cottages and apartments, but later revised the plan to create twenty-four apartments in two buildings—The Villas at Laurel Ridge. "It fit on the land better, and gave us more green space," David Rainey said.

The addition of The Villas would accomplish two objectives. The new residences would keep The Pines competitive, and they would generate new revenue that would help pay for the non-revenue-producing improvements.

The *Preserve and Progress* plan also set out an aspirational objective—to raise twenty million dollars over the next ten years. Board members knew raising that much money would be a real stretch, but they wanted to aim high. There was no question, though, that they had to raise two million dollars toward that twenty million. The Pines needed that money to help pay for the expansion.

A BETTER PINES

✎ At first, the proposed plans were met with skepticism from many residents, who worried about the size of the expansion and changes to the campus.

Over the next few months, however, Mr. Muller and Mr. Rainey met several times with the Residents' Council to answer questions, calm concerns, and glean suggestions from residents in order to shape the project. Several of those suggestions led to big improvements. In the dining room, for instance, The Pines added a hallway so residents no longer had to weave their way through the room to reach their tables. Thanks to another suggestion, The Pines added a parlor in the Hidell Nursing Unit, enabling residents to visit with their families outside of their rooms.

UPDATING THE PINES

Fresh landscaping, new artwork—even new asphalt. From its start, The Pines has worked diligently to keep its buildings and grounds updated and in good repair.

The philosophy has served the continuing care retirement community well. “We are selling The Pines every day, 365 days a year,” Pines’ Chief Financial Officer David Rainey said. “You’ve got to do this, both for the quality of life for the residents and for the long-term health of the facility.”

To make sure The Pines stays in top shape, administrators consult with architects and engineers to plan for needed maintenance and capital improvements. Money from entrance fees is used to pay for improvements.

Over the years, The Pines has replaced everything from carpets and wallpaper to parking lot asphalt and overgrown shrubs. When the artwork at The Pines needed to be replaced in apartment hallways, residents were invited to attend meetings, view a slide show of prospective pieces, and then rate them. The Pines chose artwork with the highest ratings. Also, The Pines’ landscape architect will often spend an entire day speaking with residents.

Zack Zapack, senior vice president of Carolinas HealthCare System’s Facilities Management Group, served as The Pines’ project manager during construction, then



*Updated TV and
game room.*

stayed on to help manage the operation in its first three years. Later, he served on the Board of Directors as both member and chairman.

One reason for The Pines' success, he recalled, is that its managers heeded early advice from Carolinas HealthCare System (then known as the Charlotte-Mecklenburg Hospital Authority) to put money aside for maintenance. "The reality is, a lot of facilities simply don't do that," he said.

As a result, prospective residents who visit The Pines see a facility that is desirable and up to date. "It's pretty unusual," Mr. Zapack said, "for places to look better twenty years after they're open."

Main lobby.



Updated living room.

Before work could begin, The Pines also needed approval for the expansion from the town of Davidson. Getting that permission turned out to be a challenge.

The town wanted the project to include a road through the campus that would link the towns of Davidson and Cornelius to meet its goal of street connectivity. The proposed road, Mr. Rainey said, would extend from the end of Avinger Lane and run very near The Pines' Jetton Community Center and Schramm Health Center to the Antiquity

NEARBY COMMUNITIES

The town of Davidson was founded in 1837, with the creation of Davidson College, named for Brigadier General William Lee Davidson, a Revolutionary War hero.

The Presbyterian churchmen who built the College chose the location because it was easily accessible to nearby towns. The campus sits in a geographical triangle formed by Charlotte, Statesville, and Salisbury. More than 150 years later, those same communities, as well as other nearby towns, provide The Pines with many of its residents. This patchwork of communities also provides Pines residents with a broad range of amenities.

Close to home, for instance, Davidson College offers athletic events, artistic performances and talks from leading scholars. Residents also enjoy Davidson's walkable downtown, filled with shops and restaurants.

Heading south from Davidson, Pines residents use free guest passes to the Lake Norman YMCA in Cornelius. Davidson and Cornelius share borders with Lake Norman, which has 520 miles of shoreline.

In Huntersville residents shop and dine at Birkdale, a mixed-use community that includes retail and residential areas. Pines buses regularly take



Mooresville's Main Street. (Photo courtesy of Mooresville Convention & Visitors Bureau)

neighborhood in Cornelius. It would give people a second more direct route between the two towns and help ease traffic on Main Street and Concord Road.

However, Pines officials felt they could not bow to the requirement because the road, as proposed by the town, would jeopardize residents' safety. Residents agreed. In June 2002, after many hours of discussion, the Residents' Council passed a resolution opposing any road through The Pines' campus.

residents to the symphony, opera, and other artistic events in Charlotte, about twenty miles south of Davidson.

Other area communities offer their own personalities and cultural events. North of Davidson, Mooresville is home to some of the country's top NASCAR teams, and Statesville hosts the annual Carolina Balloon Fest.

To the east, Concord is home to the Charlotte Motor Speedway, and Kannapolis has the Intimidators, the single-A farm club for the Chicago White Sox. The team is named after the town's native son, NASCAR legend Dale Earnhardt.

To the west, Denver holds a spring strawberry festival, while Lincolnton, the second-oldest incorporated city west of the Catawba River, is full of Revolutionary War and Civil War history.



Uptown Charlotte. (Photo by Patrick Schneider; courtesy of Visit Charlotte)



Cornelius Branch Library.



Through planning and creativity, the town and the continuing care retirement community found a compromise. The Pines purchased several land parcels totaling 48.7 acres. It also swapped land with one property owner and persuaded two neighbors to donate right-of-way. With this land, the institution offered a new route for the road, sending it around the southwestern side of the campus, farther from areas where residents might be walking.

On December 9, 2003, the town approved the project. The Pines would give the town the right-of-way, but would not be required to build the road. If the town eventually decided to build it, the road would connect Avinger Lane with Chapel Way in Cornelius's Antiquity neighborhood. In the end, it was a win-win result.

Over the next several years, The Pines acquired several more pieces of land contiguous to its campus. The new acquisitions, coupled with the earlier purchases, added a total of about sixty-two acres to the forty-seven acres originally purchased in 1983. Among the acquisitions were 5.5 acres donated by Patty Kimbrough King, Lawrence Kimbrough, and their family. The Pines in turn donated half the parcel to the town of Davidson for a proposed greenway. In appreciation, The Pines' Board in 2005 named the campus's loop road "Kimbrough Circle."

The decision to buy additional land—championed by Mr. Rainey—

amounted to “a strategic masterpiece,” Mr. Kimbrough said. It allowed The Pines to expand if that was ever warranted and made for a good long-term investment. Some of the new acreage also acted as a buffer between The Pines and Cornelius’s high-density Antiquity neighborhood.

CHANGES FOR A NEW CENTURY

✂ Bricks and mortar were only one sort of progress that marked The Pines’ second full decade. Activities for residents also matured.

When The Pines opened, retirement community activities were often very basic. Activity directors were known to refer to “the Three Bs”—bingo, birthdays, and Bible study.

By 2000 much had changed. The new emphasis was on wellness—and the wide-ranging activities that retirement communities could offer to promote it. Many Pines residents still enjoyed the Three Bs, but they also could choose from many other activities designed to nourish their spiritual, emotional, social, intellectual, and physical well-being.

One day, for instance, they could go to a performance of world-class musicians. On another, they could attend programs on preventing hypertension and promoting back health. And there were always opportunities to learn something new, for example, in short courses on subjects as diverse as digital photography and social dancing.

Wellness staff also began working to address physical or mental problems without drugs, using techniques such as massage, relaxation therapy, and aromatherapy.

Often, residents themselves suggested new activities. In 1999, as a growing number expressed interest in computer literacy, The Pines opened a computer room on the third floor. It offered four donated computers, including three with dial-up Internet access. Thanks to some tech-savvy residents who provided advice, more residents discovered the wonders of email. “No longer,” *The Pinepost* wrote, “does it take a dedicated effort and a 33-cent stamp to send a message to a loved one.”

Since 2000 The Pines has employed a growing number of credentialed staff members with specialized expertise. “We’ve definitely come a long way from bingo,” said Amy Smith, who in 2009 became Director of Wellness Activities and Transportation. When she started working with independent living residents in 2000, bingo was a big thing, she said. “I didn’t kill it. It sort of died on its own.”

“It’s pretty unusual,”
Mr. Zapack said,
“for places to look
better twenty years
after they’re open.”



COLLEGE, THE SECOND TIME AROUND

For John Monahan, retirement has meant learning. Since he and his wife, Rosmarie, moved to The Pines in 1993, he has audited seventeen courses at Davidson College.

Proximity to the college was the biggest reason the Monahans chose The Pines. As longtime Charlotte residents, they had attended college lectures and musical performances over the years, and they liked the idea of living so close to those intellectual resources.

"We thought you ought to keep active mentally as well as physically," Mr. Monahan said. A retired insurance company controller in North and South Carolina, he started in 1994 with a political science class. Since then he has studied, among other topics, foreign policy since World War II, Victorian literature, Islam, and religion in the American colonies.

And though he jokes about being the dumb kid in the class among Davidson's whip-smart students, he realizes that his life experience—serving as a machine gunner during World War II, living through the civil rights movement—helps provide context and perspective that an eighteen-year-old may not possess. "Been there, done it, so to speak," he said.

Mr. Monahan, who took the classes at no charge, thanks to the college, says it is impossible to calculate the value of what he has gained. "It was neat sitting there among the students, hearing their views," he said. "I thoroughly enjoyed it, I must say. It's priceless."



John Monahan.



A warm day brings Davidson College students outside for class. (Photo courtesy of Davidson College)

Fitness activities, especially, have proliferated. “There used to be a belief that when you reached a certain age, you should take it easy,” said Colin Milner, founder and Chief Executive Officer of the International Council on Active Aging. But in the mid-1990s, new research was exploding that belief by demonstrating that people of any age could benefit from exercise.

For years, The Pines had provided a lone exercise room stocked with “a mish-mash of exercise equipment that residents had donated,” Ms. Smith said. But then the warm water therapy pool opened in 1999, a cardio-fitness room was added, and The Pines hired its first fitness instructor. In 2005 The Pines opened a strength-training room. Some residents also enjoyed participating in the annual Charlotte-Mecklenburg Senior Games. One of The Pines’ notable senior athletes was Dr. W. Harding Kneedler, a retired medical missionary who had worked in Thailand. With the help of Mr. Rainey, who drove him to meets, Dr. Kneedler set state records for his age group in multiple track and field events. He was in his late nineties at the time.

In 2007 the town of Davidson opened its South Prong Rocky River Greenway, to which The Pines had donated land. Residents at The Pines could now use this new fitness amenity, which was located off Avinger Lane and offered three miles of walking trails.

Inside The Pines, Mary Martin, the fitness coordinator, taught classes—on land and in the water—focusing on aerobic exercise, strength training, and balance.

Research, Mrs. Martin said, shows that strength training helps seniors maintain their quality of life, preserving their ability to accomplish vital tasks, such as pushing themselves up out of chairs. She has continued to add new exercise equipment, such as trekking poles to increase resistance and exertion on walks and a rounded foam balance beam that improves balance, making residents less susceptible to debilitating falls.

In 2008 the donation of two Wiis to The Pines provided another fitness option for both health care and independent-living residents, who played a variety of virtual games, such as bowling and golf.

Mrs. Martin often liked to tell residents: Yes, you’re retired, but now your work has become your physical fitness. Many have heeded that message. In 2008 an estimated 50 to 60 percent of residents participated in

The workmanship in The Villas, a resident wrote, “is above par for this day and age.”





Sam Maloney, Davidson College Religion Professor Emeritus, began exercising regularly as a Pines resident.

some kind of organized fitness activity. Some, such as Sam Maloney, a retired Davidson College religion professor, did not begin regular exercise until after they retired.

At The Pines, Dr. Maloney took three water aerobics classes a week and two exercise classes that focused on strength, flexibility, and balance. “I’ve had more exercise here on a regular basis than ever in my life,” he said.

Does living in retirement communities like The Pines increase longevity? Research has not answered that question yet, but experts point out that such communities give residents easy access to good nutrition, exercise programs, and opportunities for social engagement—factors cited as promoting long and healthy lives.

“Think about it this way,” Mr. Milner said. “If you move into a community that offers you the ability to regain your level of fitness or maintain it, to truly enjoy life, it’s probably going to help longevity.”

THE EXPANSION BEGINS

✧ The Pines broke ground on its nineteen-million-dollar expansion in August 2006. Before selling bonds to finance the project, the institution sought a credit rating from Fitch Ratings. The global company awarded The Pines an “A-” rating, denoting high credit quality and low default risk. The rating put The Pines in an elite class of about twenty-five continuing care retirement communities nationwide rated in the A category. It also allowed the institution to sell its bonds at lower interest rates,

saving more than \$2.4 million in interest over thirty years.

The general contractor for this project was Weaver-Cooke Construction of Greensboro. The Pines’ original architects, Roanoke-based Sheretz, Franklin, Crawford & Shaffner, Inc., designed the two new Villa buildings, to be located behind Azalea Court on the southwest part of the campus. They were assisted by Meyer Greeson Paullin Benson, a well-regarded Charlotte architectural firm specializing in high-end residential design, which drew the schematics and floor plans for the buildings.



As Director of Marketing, Carolyn Picton often spends extensive time with prospective residents.

A DEDICATED STAFF

Every day, Pines staff members and residents interact in dozens of ways—when a maintenance worker fixes a leaky faucet, a housekeeper cleans an apartment, or a nurse or nursing assistant provides daily care at a resident's bedside in the Schramm Health Center.

Often, residents grow fond of staff. Employees cherish relationships with residents as one of the best parts of their jobs. Over time, they become part of each others' lives. "I've gotten so attached to people," said Brenda Sherrill, a housekeeper since 1999.

Resident Phyllis Tavel said she looks forward to weekly visits from housekeepers. "You're interested in them personally, and they're interested in you personally," she said. When ailments have required her to stay temporarily in the Schramm Health Center, she has always been impressed with the care. "They know what they're doing, and they're great."

It is not unusual for staff members to visit a hospitalized resident, or for residents to send condolences when there is illness or death in an employee's family.

Staff members receive a variety of training at The Pines. Residents and staffers also learn from each other. Stuart McCachern, Assistant Plant Services Director and Senior Groundskeeper, trades gardening tips with residents. "Sometimes I feel like a county extension agent," he said, as he answers questions about weed control and garden pests. At the same time, he has become more knowledgeable about roses, thanks to advice from experienced gardeners.

Melody Daniels, a registered nurse who runs the Wellness Clinic, came to The Pines when it opened in 1988. She appreciates the wisdom of residents who lived through the Depression and World War II. "These people, they share. They're giving," Mrs. Daniels said.

With such good relationships, it is not surprising that employee turnover is low, that a number of staff members have remained at The Pines since its opening, and that employees go out of their way for residents—programming a DVR, finding a misplaced purse, even fixing a lamp.

Gary Nance, who worked in maintenance from the day The Pines opened to his retirement more than twenty years later, did all those tasks and more during his career, even though they were not part of his job description. "Anything," he said, "to make the residents happy."



Melody Daniels.



Patty Kimbrough King served as Chairman of The Pines' Board of Directors from 2006 to 2008.

To design the interiors, The Pines hired the H. Chambers Company. Founded in 1899, the storied Baltimore company had included country clubs, retirement communities, and even the White House among its clients. Along with designing The Villas' common area interiors, Chambers would also redo the common area interiors throughout The Pines.

It was a huge task, Mr. Rainey recalled. Every floor and wall covering, paint color, and chair and table had to be selected. In many cases, The Pines brought in samples, particularly chairs, so staff and residents could try them out.

Updating was essential, he said, not only to keep The Pines attractive to prospective residents and thus keep occupancy high, but also to keep it financially sound. When credit-rating agencies judge a nonprofit's financial health, they take into account investment in capital improvements.

Chambers revamped The Pines' original cool color scheme of white, gray, blue, and mauve, replacing it with a warm palate that included candle-glow gold, aquamarine, and chili pepper, with black accents. The old commercial-grade carpet went out. In came high-quality wool carpets from England.

The goal, said Chambers Chairman Robert Hickman, was to provide "a level of sophistication to those corridors" that would rival a nice apartment building or condominium and would still be appropriate for residents with physical limitations. It took The Pines more than a year to obtain financing, finish the design, and launch the project. By the time work began, residents who had first questioned the project were excited. According to Mr. Rainey, some, in fact, expressed disappointment that work could not begin sooner.

Once construction started, it went smoothly, said Patty Kimbrough King, Chairman of The Pines' Board at the time. "The administration had thought through so many things," she affirmed. "It was an enormous project."

Over the next twenty months, residents watched as The Villas at Laurel Ridge rose from the ground. They also endured detours in the Jetton Community Center as contractors worked on an array of projects in the Schramm Health Center, Davidson Room, library, crafts room, kitchen, and dining room.

When workers took over the dining room, residents had meals in the Davidson Room. When the kitchen expansion began, three trailers became temporary kitchens.



Each month, Mike Holthouser gave residents a progress update. And despite the multiple projects, said resident DeForest Peterson, the construction did not interfere with residents' daily lives. The Pines "handled it very, very well," he said. "They were very considerate of the residents."

By June 2007 The Pines had raised more than two million dollars in gifts and pledges for the expansion and for strengthening its Resident Support Fund. Much had been donated by residents. It had also sold all twenty-four Villa units before they were completed. Ranging in size from 1,450 to 1,870 square feet, they featured two bedrooms, covered parking, and an open floor plan with tall windows, nine-foot ceilings, walk-in closets, and gas fireplaces.

New Villa residents were thrilled with the accommodations, Mr. Rainey said. Al Warren, one of the first residents to move into The Villas at Laurel Ridge, wrote to management praising the high-quality construction and deluxe features in his new home.

*The Villas at Laurel
Ridge at night.*

*A living room in The Villas
at Laurel Ridge.*



The workmanship, he wrote, “is above par for this day and age. That may sound like faint praise, but for the fact that those of us that are chronologically enriched can harken back to the days of craftsmanship which have long since gone. It is comforting to see corners that are plumb and walls that are straight . . . all you see these days are bent walls and cockeyed corners. The bathroom sink bowls are a gem. The quality of kitchen cabinetry is tremendous. The sliding doors to the balconies are so good, it takes a learning curve to make use of all the features.”

In January 2008 the newly expanded dining room also opened, signaling the start of more dining choices. Residents could now sit in casual or formal areas. Soundproofing reduced the room’s noise level. Other features included a buffet area and a take-out café with “grill to order” menu items.

The kitchen expansion enabled chefs to prepare a wider array of entrées. Residents could choose from a selection that included fresh fish and cooked-to-order steak, sandwiches, and vegetarian fare, and, always, many flavors of ice cream. The staff also added special culinary events, such as wine tastings, tableside cooking, and samplings of cuisines from around the world.

DINING AT THE PINES

Prime rib, salt-and-pepper catfish, fried chicken, steak au poivre, Charleston shrimp and grits—and more than twenty flavors of ice cream. Dining has come a long way since The Pines opened in 1988.

Before the opening of The Pines, Executive Director Eddie Muller had hired a dining director, only to have him back out just weeks before residents arrived. So Mr. Muller scrambled and employed a food service company.

Back then, the food was not nearly as good, said resident Annette Kreider, who came to The Pines in 1989. "They tried to do the best they could," she remembered. But money was tight, choices were more limited, and sometimes the food felt a little institutional. Think creamed chicken.

Over time, The Pines made changes. In 1992 it stopped using a food service company and began managing the dining operation with its own personnel. In 2000 The Pines hired its first Executive Chef. Expansion projects completed in 2008 gave residents casual and formal dining areas, a buffet area, a casual grill and a take-out café. Upgrades also reduced the dining room noise level.



Executive Chef Philippe Frespech and Dining Room and Culinary Director Kevin Woods.

With a better workspace, chefs could offer more choices. After the expansion, the kitchen was able to serve about 240 different entrees in a single year in two seasonal five-week menu cycles accenting spring-summer and fall-winter. Diners could choose from formal waited service or buffet options. And though the menu changed daily, residents knew they could always order certain items, including fresh fish, steak cooked to order, and vegetarian options.

That variety is important, Culinary and Dining Director Kevin Woods said, because The Pines includes residents who span a wide range of ages and grew up eating and cooking differently.

Mrs. Kreider, who has eaten at The Pines for more than two decades, rated the food better than any restaurant. "I'd call it excellent," she said. Over the years, she has also picked up an appreciation for some foods she never encountered in her home state of Illinois. Among them? That Southern favorite, okra.



The buffet at The Pines.



Pineapple upside down cake.



Club sandwich.



*Rack of lamb.**



Salmon.

*The Pines' chefs, educated and trained in the culinary arts, can also cater private events for residents to celebrate a milestone anniversary or birthday, for example. Special entrees for such occasions can be requested, such as lobster or rack of lamb. Additionally, The Pines hosts other special events such as monthly birthday dinners, the annual spring garden party, and holiday meals.

“It’s the town, the college, the church, and the integration of that,” Mr. Zapack said, “the concept of neighbors taking care of neighbors, friends taking care of friends.”



CELEBRATING SUCCESS

On May 7, 2008, the Davidson Room was filled to capacity as the community celebrated the expansion and renovation of the Jetton Community Center and the Schramm Health Center.

Dr. Maloney delivered a dedication prayer, Board Chairwoman King welcomed guests, and Board member Kathy Pilkington recognized donors. Both Mr. Kimbrough, a Board member involved with The Pines since its start, and Mr. Muller, The Pines’ first and only Executive Director, shared their reflections.

Entertainment came from Pines residents themselves, including The Pinetones. The group led the crowd in singing “When God Laid Earth’s Foundation,” an anthem whose text was written by Pines resident Mary Jackson Cathey.

To commemorate the day, The Pines gave attendees a forty-two cent United States postage stamp created for the occasion. It bore The Pines’ distinctive green and white pine tree logo. A reception followed in the garden, during which residents Libby Appel and Ruth Barton shared their musical talents on the piano.

Then, on July 18, The Pines celebrated again, this time commemorating its twentieth anniversary. Guests gathered in the Davidson Room, where Bob and Jane Avinger and Mildred Workman reminisced about the continuing care retirement community’s history. Ms. Smith premiered a DVD of photos that began with the groundbreaking and ended with recent shots. Mr. Muller recognized the residents and numerous staff members who had been at The Pines since it opened.

Making an appearance for the occasion was Rev. Charles Raynal, who had left Davidson in 1999 to direct advance studies at Georgia’s Columbia Theological Seminary. He delivered the invocation, just as he had done when The Pines broke ground in 1986.

Afterward, residents, employees, Board members, and guests enjoyed wine, hors d’oeuvres, and anniversary cake.

Only a few months later, in fall 2008, the U.S. economy crashed in what would become known as the Great Recession. Stock prices tumbled, housing values fell, and many Americans saw large chunks of their net worth disappear.

At The Pines, smaller, more affordable units were suddenly in new

demand. Some prospective residents who were ready to move in struggled to sell their homes in the weak market.

But by using its *Preserve and Progress* strategic plan, The Pines had been smart about improving its facilities and services to stay current with market demands. So despite the bad economy, occupancy levels remained high. Mr. Muller and Mr. Rainey continued work to improve the community. They regularly surveyed residents and staff to assess strengths and identify areas that needed improvement.

Twenty years into its history, The Pines has changed substantially. It has more amenities and wellness activities. It offers a larger variety of residences and a much wider assortment of dining selections. The campus has 225 independent living accommodations, up from 183 when it opened, and 81 health care residences, up from an initial 60. All the health care residents are now in private rooms. The campus itself has grown to 109 acres, more than twice its original size. Its bare red clay has been replaced by a mature landscape graced by hardwoods, shrubs, and perennials.

But in important ways, The Pines has remained the same. Its two top administrators—Mr. Muller and Mr. Rainey—were still at the helm after twenty years, providing leadership and continuity. Many people who helped create the continuing care retirement community were still deeply involved as Board members and residents.

Among them was John Kelton, who had led the successful Davidson College Presbyterian Church capital campaign in 1984 that propelled fundraising efforts. Since he and his wife, Paula, moved to The Pines in 2002, he had become involved in many ways, serving on the Residents' Council and the Learning in Retirement Committee. "It's an interesting group of people with a lot of talents and still a lot of energy to do things," he said in a later interview. "It's a place where you can live and thrive."

As The Pines began its third decade, many people had called the community home. A book of remembrance held the names of all residents who had passed away. Betty Cumming, the woman who had done so much to create The Pines, donated the book in honor of her husband, Bill Cumming, after his death in 1989. Each person noted in this book



Davidson College Presbyterian Church.



*The Chambers Building at Davidson College.
(Courtesy of Davidson College)*



Main Street in Davidson.

had played a role in shaping the place, creating a community that welcomed newcomers and reached out to neighbors in need.

Mrs. Mildred Workman, a member of the original group that helped launch The Pines, said in a 2010 interview that The Pines' success "just kind of boggles your mind, when you think what we started with."

Then ninety-four years old, she sat on the sofa in her sunny third-floor apartment, holding on her lap notes and articles about the retirement community she helped create. "We were sort of meant to be," she said. "It's a sweet story—what we call the making of The Pines. And it shouldn't be lost."

Why has The Pines been so successful? Those who know the institution best cite its great location, a talented Board of Directors, prudent management, and wonderful residents.

Mr. Zack Zapack, who served multiple roles at The Pines, including construction project manager and Board chairman, thinks its accomplishments have a lot to do with the community and the original reason a group of friends first met to plan a continuing care retirement community. "It's the town, the college, the church, and the integration of that," he said, "the concept of neighbors taking care of neighbors, friends taking care of friends."

Epilogue



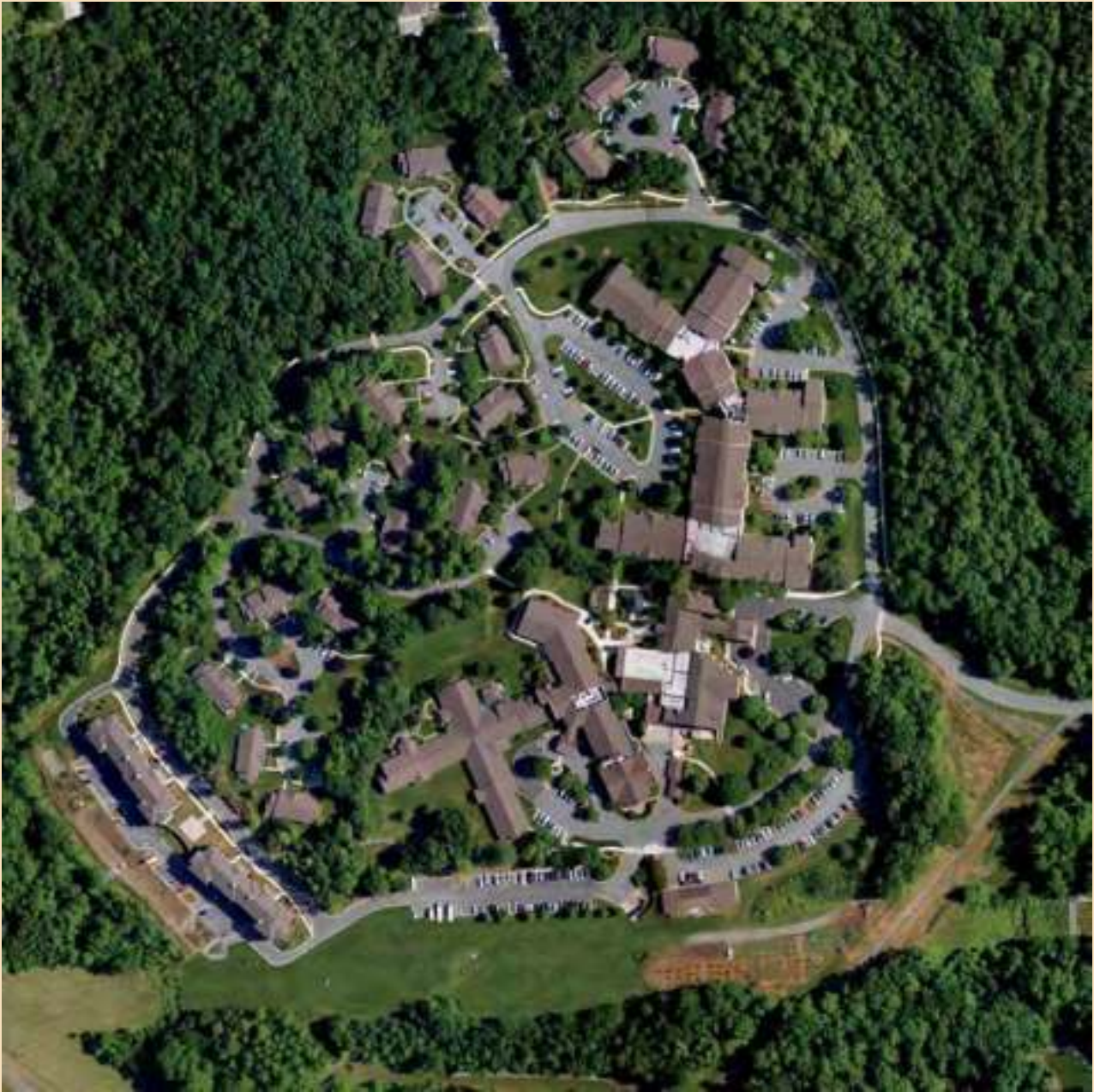
As The Pines approached its twenty-fifth anniversary, the national economy remained weak, and many housing market sectors continued to struggle. But at The Pines, occupancy stayed high and the institution's financial strength persisted, thanks to prudent marketing and conservative financial decisions. The institution carried low-cost fixed rate debt, for instance, and maintained strong liquidity, factors that helped it retain its "A-" Fitch rating.

In 2009 the continuing care retirement community approved a landscape master plan. To create the document, landscape planners sought extensive input from residents. Among their aims: Replace diseased and overgrown plantings, add new plants to provide seasonal interest, and keep the campus informal and open. This plan will guide landscape development for ten to fifteen years.

The Pines' management also continued to collaborate with the Residents' Association, tackling projects such as the addition of new sidewalks and improved services and facilities.

Contributions to the *Preserve and Progress* Campaign made it possible for The Pines to establish in 2011 a Restorative Aide Program, which seeks to minimize falls among its residents by providing customized exercise instruction. Through the establishment of this Program, The Pines was able to hire and train a Certified Nursing Assistant who works one-on-one with residents, in consultation with The Pines' physical therapists, to improve their muscle strength and balance.

Donations to the *Preserve and Progress* Campaign also made it possible for The Pines to establish in 2011 an Employee Fund to support the training and education of Pines' employees. The Employee Fund will provide additional opportunities for employees to participate in group and individual training that is directly job related.



In 2011 the Board of Directors updated The Pine's long-range plan. They named it *Exceeding Expectations: A Path to Excellence* and retained the methodology used before to measure progress and keep management accountable.* A roadmap for the future, the new plan will help The Pines provide high-quality housing, health care, and other services that will exceed residents' expectations for many years to come.

*The Pines' Mission Statement, revised in 2011 as part of the *Exceeding Expectations* long-range plan, can be found on page xi.

The Pines: A Timeline



1977: Davidson residents interested in creating a retirement community visit a continuing care retirement community in the North Carolina mountains.

NOVEMBER 7, 1979: The Davidson Retirement Community Committee puts its plans on hold because of soaring interest rates and the deteriorating economy.

NOVEMBER 4, 1980: Former California Governor and actor Ronald Reagan wins the presidency, beating incumbent Jimmy Carter in a landslide.

FEBRUARY 9, 1983: The Pines incorporates as Davidson Retirement Community, Inc. (DRC).

APRIL 1983: DRC launches a quiet campaign to raise at least \$100,000 to buy land and pay for other early expenses.

JANUARY 1, 1984: DRC purchases forty-seven acres of the Thompson Farm property for \$272,187.55.

NOVEMBER 1984: Davidson College Presbyterian Church launches a capital campaign to raise \$750,000 for the DRC. It surpasses its goal, raising \$840,000.

FEBRUARY 26, 1985: The DRC board approves the name "The Pines at Davidson."

APRIL 1986: The Charlotte-Mecklenburg Hospital Authority (now Carolinas HealthCare System) begins working with The Pines to oversee construction.

OCTOBER 12, 1986: The Pines breaks ground.

MARCH 24, 1988: Pines' Executive Director Eddie Muller begins his first day at work.

JULY 18, 1988: The Pines opens, with its first three residents moving in.

JULY 25, 1988: The Pines celebrates its opening with a ribbon-cutting ceremony.

OCTOBER 1988: The Pines issues \$24 million in tax-exempt bonds to pay off higher-interest construction loans and provide operating cash.

NOVEMBER 8, 1988: George H. W. Bush wins the presidency, defeating Michael Dukakis.

JANUARY 1989: The Pines' Residents' Association is formed.

AUGUST 30, 1989: An anonymous donor gives The Pines a twenty-seven-passenger bus valued at more than \$50,000.

JULY 1991: The Pines' management agreement with the Charlotte-Mecklenburg Hospital Authority (CMHA) expires but the relationship continues when CMHA officer Zach Zapack joins The Pines' Board.

JULY 1991: The Pines retires \$8 million of the \$24 million in tax-exempt construction bonds issued in 1988 to finance the facility.

NOVEMBER 1991: To improve care, The Pines relocates Health Center residents with severe dementia to the Health Center's west wing.

NOVEMBER 3, 1992: Bill Clinton is elected President.

1993: The Pines adds ten cottages.

SEPTEMBER 1995: Executive Director Eddie Muller reports that The Pines' Health Center expansion campaign has exceeded its \$1 million goal.

DECEMBER 1995: The Board learns that The Pines will receive a net sales tax return of \$714,506 from the State of North Carolina, after winning a lawsuit that gave all North Carolina nonprofit retirement communities a sales tax exemption.

JUNE 4, 1996: The Pines celebrates the completed Health Center expansion, which includes the new Purcell Wing, a memory-impairment unit.

SEPTEMBER 3, 1996: The Pines establishes the William H. and Sarah E. Jetton Deferred Giving Society.

DECEMBER 8, 1998: The Pines dedicates its Mildred T. Workman Wellness Center.

APRIL 4, 2000: The Board expresses appreciation for the donation of 5.5 acres of land adjacent to The Pines given by Patty Kimbrough King, Lawrence Kimbrough, and other members of their family.

SEPTEMBER 2000: The Pines launches a Web site: www.thepinesatdavidson.org.

NOVEMBER 7, 2000: George W. Bush is elected President.

DECEMBER 5, 2000: The Board approves its *Preserve and Progress* strategic plan, which sets out key goals, measurable objectives, and strategies.

SEPTEMBER 11, 2001: Terrorists attack America.

NOVEMBER 19, 2001: The Board authorizes the purchase of several land parcels on the south side of The Pines totaling 48.7 acres.

JUNE 2003: The Pines is now smoke-free in all common areas.

DECEMBER 9, 2003: The Town of Davidson approves The Pines' \$19 million *Preserve and Progress* expansion plans. The project includes the addition of ten assisted living beds, a net of four new Nursing Unit beds, and twenty-four apartments, known as The Villas at Laurel Ridge. The plans also include expansion in other areas, including the dining room and kitchen.

JUNE 7, 2005: The Pines' Board names the loop road Kimbrough Circle in appreciation of the contributions of the Kimbrough family.

2006: Fitch Ratings, the global financial rating company, gives The Pines an "A-" rating, denoting high credit quality and low default risk. The Pines is only one of twenty-five CCRCs nationwide to be rated in the A category.

2006: The Pines issues \$30,980,000 in tax-exempt debt to finance the expansion and refinance outstanding debt at lower interest.

AUGUST 2006: The Pines holds a groundbreaking ceremony for the expansion project.

2007: The Town of Davidson opens the South Prong Rocky River Greenway, which includes three miles of walking trails. It can be accessed on Avinger Lane. The Pines donated right-of-way for the town for a portion of the greenway.

MARCH 2007: The Pines prohibits smoking inside independent living units.

JUNE 2007: The \$2 million *Preserve and Progress* campaign for the ongoing expansion and for strengthening the Resident Support Fund exceeds its goal.

JANUARY 2008: Expanded dining room opens to residents.

JANUARY–FEBRUARY 2008: The Villas at Laurel Ridge are completed.

MARCH 2008: *Preserve and Progress* expansion completed.

MARCH 2008: Pines residents cheer the Davidson College Wildcats men's basketball team, which makes it to the NCAA Tournament's Elite Eight before losing to the Kansas Jayhawks, the eventual national champions.

MARCH 2008: The Pines implements its Project Lifesaver Program, which uses a device that can track residents with dementia who may be in danger of wandering.

MAY 7, 2008: A dedication ceremony celebrates the completion of the *Preserve and Progress* campaign.

JUNE 18, 2008: The Pines celebrates the twentieth anniversary of its opening.



HOW DO I BECOME A RESIDENT OF THE PINES AT DAVIDSON?

The Pines at Davidson invites you to learn more about becoming a resident:

- Visit our website at www.thepinesatdavidson.org
- Call our Sales and Marketing Department at **704 896-1100**
 - to request materials about our Future Residency Program
 - to set up a tour and complimentary lunch at The Pines

Our Sales and Marketing Department will be happy to answer any questions you may have about The Pines at Davidson.

Our address is **400 Avinger Lane, Davidson, NC 28036.**



Vibrant Living in a College Community

Appendices



Advisors, Board Directors, and Officers of The Pines at Davidson

MEMBERS OF THE PRE-OPENING BOARD OF DIRECTORS: 1982–1988

This list includes members of the 1982 Davidson Retirement Committee.

Robert L. Avinger, Jr.*
(President)
Herbert H. Browne, Jr.
Donald G. Bryant
William H. Cannon
L.D. Coltrane III
Ben T. Craig
Edward E. Crutchfield, Jr.
Elizabeth Cumming
William “Bill” P. Cumming
Robert A. Currie
Larry J. Dagenhart
J. Roy Davis, Jr.
Goudyloch “Giddy” Erwin
Dyer*
Robert C. Dyer
Monroe T Gilmour
Seddon “Rusty” Goode, Jr.
Warner Hall
Willis “Bill” J. Hidell *
Jack B. Hobson
Sarah E. Jetton
James V. Johnson
Frontis W. Johnston

John D. Kelton
Lawrence M. Kimbrough*
Russell B. Knox
John W. Kuykendall
Nancy M. “Missy” Kuykendall
Paul R. Leonard, Jr.
Sally M. Lowrance
Charles F. Marshall, Jr.
Joseph B. McCoy, Jr.
Paul C. Meech
Julius W. Melton
William A. Mills
Mary B. Newell
Kathryn W. Preyer
Charles E. Raynal III
Rosemary Raynal
John S. Steele
Pat Sailstad
Robert J. Sailstad
George J. Sawyer III
Sam R. Sloan
Ava Spencer
Samuel R. Spencer, Jr.
Fred Stair

Robert S. Sutton
John A. “Jack” Tate, Jr.*
Dorothy “Dolly” Tate
Hugh D. Verner
Ben T. Vernon, Jr.
William A. White, Jr.*
W. T. “Bill” Williams, Jr.
Harry F. Wolfe, Jr.
William P. Wood
Mildred T. Workman
W. Gatewood “Gaty” Workman
W. Terry Young

1983–88 Ex-officio Directors

Goudyloch “Giddy” Erwin
Dyer
Sarah E. Jetton
Frontis W. Johnston
John W. Kuykendall
Charles E. Raynal III
Mildred T. Workman

**Denotes members who served
as officers*

CAPITAL CAMPAIGN EXECUTIVE COMMITTEE

In 1984 Davidson College Presbyterian Church launched a capital campaign that ultimately raised \$840,000 for the Davidson Retirement Community project.

John Kelton (General
Chairman)
Robert L. Avinger, Jr.
Mary D. Beaty
Mary C. Black
Annamarie Burts

Katherine B. Couch
William H. Jetton
Lawrence M. Kimbrough
Pat Knox
Malcolm Lester
Robert J. Manning

Adeline Ostwalt
Charles E. Raynal III
Norman S. Richards
William H. Terry

FOUNDING ADVISORY COUNCIL: 1988

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Abernethy
Jane J. Avinger
Mr. and Mrs. James L. Bell
Frank W. Bliss
D. Lynn Burris
Richard C. and Annamarie
Burts, Jr.
Katherine B. Couch
William "Bill" P. Cumming
Robert A. Currie

Robert C. Dyer
Nancy Griffith
Mrs. Robert K. Kerr
Steven M. Kessler
Malcolm and Polly Lester
S. Edwin Lewis
Billy McCall
Adelaide "Babs" McKelway
Julius W. Melton
H. B. and Jay Naramore
Norman and Lemie Richards

Pat Sailstad
Judy Schuh
Samuel R. and Ava Spencer, Jr.
Ruby Stroud
John A. Tate, Jr.
J. E. Wayland, Jr.
Mack W. White
W. Gatewood "Gaty"
Workman



MEMBERS OF THE BOARD OF DIRECTORS: 1988–2008

Jane J. Avinger
 Robert L. Avinger, Jr.*
 Evelyn Barrier
 Stephen D. Bradley, Jr.
 Richard T. Brigden*
 Herbert H. Browne, Jr.*
 Annamarie B. Burts
 Lester D. Coltrane III
 Ben T. Craig
 Jane S. Craig
 Allen Craven
 John R. Cunningham III
 J. Roy Davis, Jr.
 Lacy Woods Dick
 James J. Elliott
 Raycinia Creer Ellison
 John F. “Chip” Fesperman II
 William P. Furr
 John N. Gilbert, Jr.
 Jane N. Goode
 Seddon “Rusty” Goode, Jr.
 Willis “Bill” J. Hidell*
 Jack B. Hobson
 Walter B. Holland
 R. Burton Hudson, Jr.
 James V. Johnson
 Ed Kania
 Cheryl K. Kelling
 John D. Kelton*
 Lawrence M. Kimbrough*
 Patty Kimbrough King*
 Robert Edward Kizer, Jr.*
 Russell B. Knox

Nancy M. “Missy” Kuykendall
 Paul R. Leonard, Jr.
 Charles F. Marshall, Jr.
 David M. McClintock*
 Joseph B. McCoy, Jr.
 J. Martin McCoy
 Paul C. Meech
 James F. Miller
 William A. Mills
 Barbara Neidinger*
 Mary B. Newell
 Ronald A. Norelli
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 Luis Peña
 Kathy L. Pilkington
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 Ava C. Spencer
 John S. Steele
 Robert S. Sutton*
 Dorothy “Dolly” N. Tate
 Ben T. Vernon, Jr.
 Patricia S. White
 William A. White, Jr.
 F. E. “Gene” Williams
 T. Duke Williams

W. T. “Bill” Williams, Jr.*
 Harry F. Wolfe, Jr.
 William P. Wood
 W. Terry Young
 Zachary J. Zapack*

Ex-officio Members

Kathy Beach-Verhey
 A. Allen Brindisi
 Sarah E. Jetton
 John W. Kuykendall
 Charles E. Raynal III
 Thomas W. Ross
 Robert F. Vagt
 Mildred T. Workman

**Denotes members who served as officers*

Board Chairs: 1988–2008

Robert L. Avinger, Jr.
 (1988–1990)
 Willis “Bill” J. Hidell
 (1991–1992)
 Lawrence M. Kimbrough
 (1993–1996)
 Zachary J. Zapack (1997–1999)
 Richard T. Brigden
 (2000–2003)
 Robert Edward Kizer, Jr.
 (2004–2005)
 Patty Kimbrough King
 (2006–2008)

RESIDENTS' ASSOCIATION OFFICERS: 1989–2008

*All Pines residents are members of the Residents' Association.
Each year, the Association elects officers who serve
on a Residents' Council, which meets regularly.*

1989

President – Ralph Glenn
Vice President – Robert Kizer
Secretary – Ginny Williamson

1990

President – Robert Kizer
Vice President – Ginny Williamson
Secretary – Lila McMillan

1991

President – Ginny Williamson
Vice President – Pete Kreider
Secretary – Lila McMillan
Treasurer – Evelyn Stone

1992

President – Pete Kreider
Vice President – Charles Marshall
Secretary – Mary Potts
Treasurer – Evelyn Stone

1993

President – Charles Marshall
Vice President – Marion Dobbin
Secretary – Ruth Manning
Treasurer – Evelyn Stone

1994

President – Charles Marshall
Vice President – Marion Dobbin
Secretary – Margaret Spencer
Treasurer – George Labban

1995

President – Marion Dobbin
Vice President – John Monahan
Secretary – Barbara Tweedle
Treasurer – Boyd Creath

1996

President – John Monahan
Vice President – Mary Anna Bode
Secretary – Jean Mobley
Treasurer – Boyd Creath

1997

President – Mary Anna Bode
Vice President – George Labban
Secretary – May Davidson
Treasurer – Edward C. “Champ” Land

1998

President – Mary Anna Bode
Vice President – George Labban
Secretary – May Davidson
Treasurer – Lena Cathey

1999

President – Lebby Boinest
Vice President – Betty Gay Bivens
Secretary – Marjean Jones
Treasurer – Lena Cathey

2000

President – Lebby Boinest
Vice President – George Pusack
Secretary – Marjean Jones
Treasurer – Marty Innes

2001

President – George Pusack
Vice President – Max Polley
Secretary – Lib Roberts
Treasurer – Tom Skeel

2002

President – Max Polley
Vice President – Mary Haskins
Secretary – Lib Roberts
Treasurer – Tom Skeel

2003

President – Mary Haskins
Vice President – Malcolm Lester
Secretary – Miriam Bode
Treasurer – Whit Whitney

2004

President – Malcolm Lester
Vice President – Ruth Chياما
Secretary – Miriam Bode
Treasurer – Whit Whitney

2005

President – Ruth Chياما
Vice President – Gene Anderson
Secretary – Lib Roberts
Treasurer – Sam Hay

2006

President – Gene Anderson
Vice President – John Kelton
Secretary – Carol Cook
Treasurer – Sam Hay

2007

President – John Kelton
Vice President – Jan Wetmore
Secretary – Carol Cook
Treasurer – Ginger Hall

2008

President – Jan Wetmore
Vice President – Ted Rautenberg
Secretary – Isabelle Powell
Treasurer – Mary Ann Taylor



APPENDIX 2

Supporters of The Pines at Davidson

FOUNDING DONORS

Those who provided financial support to establish The Pines at Davidson are honored on a plaque displayed in the Jetton Community Center. It reads as follows:

Grateful thanks is given to
DAVIDSON COLLEGE PRESBYTERIAN CHURCH
Dr. Charles E. Raynal III, Minister
for sponsoring
The Pines at Davidson.

This structure stands thanks to these individuals and foundations
who provided resources to enable the dream to begin.

1983–1988



Founding Patrons

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Miss Elizabeth Davidson
Miss Jane V. Davidson
Miss May Davidson
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Dr. and Mrs. Joseph T. Drake
Mrs. Susanna Duckworth
Mr. and Mrs. Paul C. Edmunds
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Mrs. Elisabeth Emory
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 Mrs. Sallie D. Johnson
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A CAMPAIGN FOR A GROWING PINES: DONORS

In late 1993, The Pines at Davidson launched its first post-opening fundraising campaign. Exceeding its goal of \$1 million, the campaign enabled The Pines to renovate and expand the Schramm Health Center, which included enlarging its dining room and adding a memory-care unit complete with its own dining-activity room and enclosed courtyard. Gifts also strengthened the Resident Support Fund. Inside the Schramm Health Center entrance, a plaque that recognizes campaign donors reads as follows:

The expansion and renovation of this facility occurred thanks to
these individuals and companies who provided resources
to enable the dream of The Pines to continue.

1994–1995



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WARM WATER THERAPY FACILITY: DONORS

In 1998 The Pines completed a \$3 million campaign to build a Wellness Center as well as a Warm Water and Hot Water Therapy Pools Facility. The Wellness Center was named in honor of Mildred T. Workman at the request of her friend Mariam Schramm, a major benefactor of the project. Below is the text of the plaque recognizing campaign donors:

Warm Water Therapy Facility

The Pines at Davidson extends its sincere appreciation to the following generous donors for their gifts which have greatly enhanced the quality of the life for residents.

June 1, 1999



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PRESERVE AND PROGRESS CAMPAIGN: DONORS

The Preserve and Progress campaign raised more than \$2 million to expand and improve numerous areas, including the Schramm Health Center, dining room, kitchen, Davidson Room, library, and arts and crafts room. Campaign gifts also strengthened the Resident Support Fund. A plaque in The Pines' Jetton Community Center reads:

Preserve and Progress:
A Campaign for The Pines at Davidson
2000–2007

The Pines at Davidson gratefully recognizes the following donors
whose generosity made possible the expansion and renovation
of the Jetton Community Center and the Schramm Health Center
and who supported its charitable mission.



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RESIDENT SUPPORT FUND: NAMED FUNDS

The Resident Support Fund provides assistance to those residents who for unforeseen circumstances find themselves in financial distress. Named funds can be established with a gift of \$5,000 or more. The following individuals have established or have been remembered through a named fund.

Vance Alexander
Elizabeth C. Appel
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Betty Gay Bivens
Nyra B. Brannan
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Don and Mary Haskins
Sewell Helvey
Roger B. Hendrix
Mary Stough Kimbrough
Robert E. and Rebecca G. Kizer
Pete E. and Annette E. Kreider
Emily Frazer Kuykendall

George and Mary Ann Labban
Malcolm and Polly Lester
Stan and Jewel Lovejoy
Sam and Ann Maloney
Charles F. Marshall
Bill and Louise Martin and family
Charles C. and Ingrid A. Massey
Wilma K. McCall
Jean Bellinrath Mobley
David W. and Shirley B. Morrow
Dula Nicholson
DeForest and Dolly Peterson
Kathryn C. and Norris W. Preyer
D. Craig and Maryetta H. Purcell
David C. and Emily D. Rainey
Elizabeth Rivers
Mariam Coltrane Schramm
Vicki A. Scott
Beryl Faith Smith
Helen E. Spelbrink
Marjorie Lawrence Stell
Ben T. Vernon, Jr.
Donald and Elizabeth Whitener
Virginia C. Williamson
Bill and Doris Woodward
William G. and Mildred T. Workman
William Wubben



THE JETTON DEFERRED GIVING SOCIETY

Named in honor of William H. and Sarah E. Jetton, the Jetton Deferred Giving Society was created in 1996 to recognize donors who make provisions to give to The Pines after their lifetimes. The following are members (as of February 2012):

Sarah Alexander	Ginnie and Bob Greenock	Jane and Ray Pippin
Vance Alexander	Gerry and David Griffin	Barbara and Marvin Pollard
Gene Anderson	Frances Gwynn	Maryetta and Craig Purcell
Libby Appel	Elizabeth Harrell	Emily and David Rainey
Evelyn and Ken Bacon	Pearl Harrelson	Gertha and Laurier Richards
Margaret Barnhardt	Sewell Helvey	Pat Sailstad
Gretchen Bickerstaff	Marguerite Huey	Charles Schisler
Betty Gay Bivens	Mary Lib Ingle	Mariam Schramm
Maude Boysworth	Sarah Jetton	Peggy and Mercer Simmons
Jill and Steve Bradley	Rachel and Arthur Jones	Faith Smith
Nyra Brannan	Paula and John Kelton	Marjorie Stedman
Carol Brookman	Olivia Kim	Elaine Steele
Camy and Cleveland Brown	Ruth Kimzey	Marjorie and Lawrence Stell
Mary Lore and Harry Brown	Elizabeth Kingman	Hazel and Jim Sullivan
Frances Cannon	Polly and Malcolm Lester	Phyllis Tavel
Jan and Myron Chartier	Polly and Eugene Lombardi	Billie Thomason
Cy Cooke	Carter and John Lyles	Sarah Tietze
Marion and Boyd Creath	Ann and Sam Maloney	Cary Johnston and Ed
Fran Crotty	Louise and Bill Martin	Townsend
Marion and Dale Cutler	Ingrid and Charles Massey	Gloria and Marshall Tucker
Elizabeth Davidson	Wilma McCall	Barbara Tweedle
May Davidson	Jean Mobley	Ben Vernon
Marion Dobbin	Esther Muhlinghaus	Catherine and Hallam Walker
Giddy Dyer	Betty and Eddie Muller	Elizabeth and Donald
Helen Dyer	Kitty Nowell	Whitener
Jane and Rusty Goode	Dolly and DeForest Peterson	Emmett Williams
Lura and Robert Gordon	Kathy L. Pilkington	William Wubben



Expansion of Residences at The Pines at Davidson

*In 1988 The Pines opened with 183 independent living units and 60 Health Center beds.
Twenty years later it had 225 independent living units and 81 Health Center beds.
The following timeline shows the changes in unit numbers over the years:*

1988 OPENING: A total of 183 independent living units, including 171 apartments and 12 cottages, plus 60 Health Center beds.

1989: Added 14 cottages, for a total of 26.

1992–1998: Reduced apartments by 11, to 160, by combining smaller units to create larger units.

1993: Added 10 cottages, for a total of 36.

1995: Guest room opened, reducing apartments by one, to 159.

1996: Added 7 Health Center beds, for a total of 67.

1997–1998: Added 8 cottages, bringing total to 44.

1999: Split one larger and previously combined independent living unit back into two units.

2000–2002: Reduced independent living units by 3, to 157, by combining smaller units to create larger units.

2008: The Villas at Laurel Ridge are completed, adding 24 independent living units. With the 157 apartments and 44 cottages, The Pines has 225 independent living units.

2008: The Schramm Health Center added 14 beds for a total of 81, 30 in assisted living and 51 in the Hidell Nursing Unit. All are now private rooms.



Selected Articles from The Pinepost

In 1989, shortly after The Pines opened, Betty Cumming, one of the people instrumental in founding The Pines, recounted how it came to be. Here are highlights from her account, first published in The Pinepost, the Residents' Association newsletter.

THE PINES—HOW DID IT ALL BEGIN?

The Pines began, I believe, in the fact that Davidson has always been a close-knit community of neighbors, conscious of each others' needs, and expecting to deal with them ourselves rather than to seek extraneous aid. . . . Somewhere out of discussions (among local service organizations), about fifteen years ago, rose the persistent question, "Could we possible have a pleasant life-care community for old people right here in Davidson?" Who asked it first will never be known.

I can, however, identify a few of the members who formed the first little group which dared to decide to start doing something about this seemingly impossible dream. There was "Pete" Barnes and her good husband, there were Bob and Pat Sailstad; there were the Cummings, stubbornly clinging to the hope of solving the impossibility of moving Bill away from his precious map collection, now willed to the Davidson College Library. We circulated a little questionnaire in the town.

(Former Davidson College) President Sam Spencer moved us in the first direction by suggesting that we go to Black Mountain to visit Highland Farms, run by Chester Prentice. We climbed the mountain in deep snow. Mr. Prentice galvanized us by saying that he would like to advise us in forming a branch of Highland Farms at Davidson. This was a for-profit community based on many small investments. We went a long way with Mr. Prentice: meeting in Charlotte and Davidson, and

growing a mailing list which reached 300 names. Then came the first awful setback, the rise of interest rates in the mid-'70s, which made it impossible to borrow money for construction. What seemed doom was really blessing, however, for when our little group crawled into action again, we headed toward the non-profit, church-related community which we now have.

Nevertheless, it was a much-sobered few whom Reverend Charles Raynal found grimly meeting when he came to minister to the Davidson (College Presbyterian) Church. He was fresh from the South Carolina Presbyterian Community at Summerville, where his father was chaplain, and convinced that such places were a proper mission of the church. Our group widened. Another godsend was the return to Davidson of Giddy Erwin Dyer, boundless in energy, who got the director of all the South Carolina homes to talk to us. At the end, he said, "You're going to succeed, you know." "How do you know?" we gasped. "Because of the people I see in this room," he replied.

I have not space to record how our group developed into a competent volunteer board of directors. . . . Nor can I tell how we decided that we could be only loosely related to the North Carolina Synod's Presbyterian Homes. Our momentum was up, and they were moving too slowly for us.

Let me close by telling with great pride in what way we are truly church-related. Came the time when we simply had to have some money to get started. . . . Charles Raynal preached a wonderful sermon on the privilege of assisting at the birth of a great Christian Institution; and the congregation of the Davidson College Presbyterian Church numbering about 550 people, in one month, with no assurance of our success, gave \$800,000 to set The Pines on its way! And so it all began.

In 1996 the late Duncan MacBryde, an early Pines resident, wrote about aging in The Pinepost, the Residents' Association newsletter. Excerpts of his essay follow.

THE GREAT ADVENTURE

What some people resignedly refer to as “getting old” is (at least in my view at 85) one of life’s greatest adventures.

The question is, what is our attitude about this business of aging? Too often aging is thought of as a whole bundle of problems; that aging means loneliness and sickness. I was never lonelier or sicker than at the age of five, when I nearly died of scarlet fever. But my age had nothing to do with it. Aging and indisposition are not the same!

My wife and I, living in this closely-knit retirement community, have often been struck by the thousand-and-one ways in which loving and caring mark our days. Think of the long list we could compile of what the poet calls “the little, nameless, unremembered acts of kindness and love.” There is the little note tucked in a neighbor’s door, the whispered hello to the friend in Health Care, the bag of fruit hung on an apartment doorknob—the list is endless. Life is fragile, our bodies cannot last forever, but love is eternal!



A P P E N D I X 5

N.C. Court of Appeals Decision, *Davidson Retirement
Community, Inc. v. Betsy Y. Justus, Secretary, State
of North Carolina Department of Revenue*

NO. COA94-763
NORTH CAROLINA COURT OF APPEALS
Filed: 1 August 1995

Mecklenburg County No. 90-CVS-11666
DAVIDSON RETIREMENT COMMUNITY, INC., *Plaintiff*,
v.
BETSY Y. JUSTUS, Secretary,
State of North Carolina Department of Revenue, *Defendant*.

Mecklenburg County No. 90-CVS-17819
SOUTHMINSTER, INC., *Plaintiff*,
v.
BETSY Y. JUSTUS, Secretary,
State of North Carolina Department of Revenue, *Defendant*.

Appeal by plaintiffs and defendant from judgment entered 29 March 1994 by Judge Shirley L. Fulton in Mecklenburg County Superior Court. Heard in the Court of Appeals 4 April 1995.

*Robinson, Bradshaw & Hinson, P.A., by Russell M. Robinson, II,
Louis A. Bledsoe, III, and J. Stephen Dockery, III, for plaintiffs.*

*Attorney General Michael F. Easley, by Senior Deputy Attorney General
Reginald L. Watkins and Special Deputy Attorney General George W. Boylan,
for defendant.*

MARTIN, John C., Judge.

Plaintiffs are religiously affiliated, non-profit corporations operating continuing care facilities for the elderly. Plaintiffs commenced these actions to obtain refunds, pursuant to the provisions of G.S. § 105-164.14(b), of sales and use taxes paid by them. Defendant denied plaintiffs' entitlement to the exemption on the grounds plaintiffs are not charitable or religious institutions within the meaning of the statute. The cases were consolidated and heard by the trial court in a bench trial.

The evidence at trial, most of which was stipulated by the parties, tended to show the following: Plaintiff Davidson Retirement Community, Inc., ("The Pines"), was incorporated in 1983 for the purpose of funding and operating a nonprofit home providing health care and assistance in living to the elderly and infirm. The Pines was founded by and is affiliated with the Davidson College Presbyterian Church in Davidson. Plaintiff Southminster, Inc., ("Southminster"), was organized as a nonprofit corporation in 1984 for the express purpose of providing "a residential environment in which older people may live as independently and as actively as their faculties and strength permit, secure in the knowledge that support is available when and as it may be needed." Southminster was created by the joint effort of Myers Park Baptist Church and Christ Episcopal Church in Charlotte, and Southminster has maintained its affiliation with these churches to the present.

The Internal Revenue Service ("IRS") and the North Carolina Department of Revenue have determined that both plaintiffs are nonprofit, charitable organizations exempt from federal and state corporate income taxes and state franchise taxes. Plaintiffs are also both exempt from local property taxes as qualifying homes for the aged. G.S. § 105-164.14(b) provides that sales and use taxes must be refunded to "churches, orphanages and other charitable or religious institutions and organizations not operated for profit. . . ." In 1984, the Sales and Use Tax Division of the North Carolina Department of Revenue changed its interpretation of "charitable institutions" under G.S. § 105-164.14 (b) to exclude institutions similar to plaintiffs from exemption. The change in policy came as a result of two decisions of this Court upholding determinations by the Property Tax Commission that non-profit homes for the elderly operated similarly to plaintiffs' did not qualify for the charitable purpose exemption from *ad valorem* taxes. See *In re Appeal of Barham*, 70 N.C. App. 236, 319 S.E.2d 657, *disc. review denied*, 312 N.C. 622, 323 S.E.2d 921 (1984); *In re Chapel Hill Residential Retirement Center*, 60 N.C. App. 294, 299 S.E.2d 782, *disc. review denied*, 308 N.C. 386, 302 S.E.2d 249 (1983). The Pines was denied

refunds for its sales and use taxes beginning in 1985, while Southminster was denied refunds beginning in 1987.

Both plaintiffs' facilities consist of independent living units, common living units, and health care centers. The Pines opened in 1988, and currently maintains 204 independent and common units with 60 beds in its health care facility. Southminster opened in 1987, and has 196 independent and common living units with 80 beds maintained in its health care center. Plaintiffs received their initial funding for construction from charitable donations and public revenue bonds issued by the North Carolina Medical Care Commission, and plaintiffs continue to receive charitable donations.

Plaintiffs also charge entrance fees and monthly service fees to their residents, with the amount of the fees determined by a resident's choice of living accommodations. The entrance fees at The Pines range from \$35,800 for a small efficiency apartment to \$115,500 for a large cottage, while the monthly service fees for such accommodations range from \$976 to \$1,524. This monthly fee is increased by approximately fifty percent if two individuals occupy a unit. Southminster has entrance fees ranging from \$30,900 to \$162,500 for accommodations similar to those at The Pines, with monthly service fees from \$1,000 to \$1,350 plus an additional \$715 for an additional occupant. These fees collected by The Pines and Southminster cover, respectively, ninety-six percent and eighty-six percent of plaintiffs' operating expenses.

The average annual income of the residents who had reserved accommodations at The Pines as of 29 August 1988 was \$43,000 while their average net worth was approximately \$444,000. As of 13 November 1985, over eighty-eight percent of residents reserving a living unit at Southminster reported net worths over \$200,000, while sixty-three percent had net worths over \$350,000. Over fifty percent of those reserving accommodations at Southminster reported annual incomes over \$40,000. Plaintiffs' residents who do not have high net worths and/or annual incomes are generally able to meet the entrance fee and monthly service fees by selling their homes upon entering The Pines or Southminster.

Plaintiffs' contracts with their residents authorize the removal of residents who are unable to meet their financial obligations to plaintiffs; however, it is not the policy of either plaintiff to terminate any resident's occupancy based on an inability to pay. To that end, Southminster created a nonprofit corporation, Southminster Endowment, Inc., and The Pines created a separate deposit account, the Resident Support Fund. These funds receive charitable donations and are plaintiffs' top fundraising priorities. If circumstances require special consideration of a prospective or current resident's ability to pay the entrance

or monthly fees, these funds may be used to subsidize part or all of the fees in question. To date, Southminster Endowment, Inc., has financially assisted three residents in meeting the costs of the entrance fee, and nine residents in making their monthly service payments. There has yet to be any assistance provided to a prospective or current resident from The Pines' Resident Support Fund.

There was also evidence that since 1984, defendant had denied refunds for sales and use taxes to six similar institutions, while at the same time granting refunds to five similar institutions. Defendant's enforcement policy is to thoroughly examine refund requests from new institutions, including an examination of fee schedules. However, existing institutions previously exempted from sales and use taxes were not asked for similar information and continued to receive refunds. The evidence indicated defendant lacked the resources necessary to continuously monitor the eligibility of organizations receiving refunds without some indication of an irregularity. Other evidence indicated defendant's refund policy was not being enforced uniformly.

The trial court made extensive findings of fact and concluded, citing *In re Chapel Hill Residential Retirement Center, supra*, that plaintiffs were not charitable organizations exempt from sales and use taxes under G.S. § 105-164.14(b) and, in addition, were not exempt as religious organizations. The trial court concluded, however, that defendant's "arbitrary, inconsistent and inequitable application of the 'charitable and religious' test to allow exemptions for some but not all institutions of like kind" was discriminatory and unconstitutionally vague, thus violating plaintiffs' equal protection and due process rights. The trial court entered judgment in favor of plaintiffs, ordering defendant to refund each plaintiff all sales and use taxes paid for the claimed periods. Plaintiffs appeal from that portion of the judgment holding they are neither charitable nor religious organizations exempt from sales and use taxes; defendant appeals from that portion of the judgment holding that defendant had violated plaintiffs' constitutional rights and awarding them refunds.

Plaintiffs assert that the trial court erred by concluding that they are neither charitable organizations nor religious organizations within the meaning of G.S. § 105-164.14(b) so as to qualify for refunds of sales and use taxes. G.S. § 105-164.14(b) provides, in pertinent part:

The Secretary of Revenue shall make refunds semiannually to . . . churches, orphanages and other charitable or religious institutions and

organizations not operated for profit of sales and use taxes paid under this Article, . . . , by such institutions and organizations on direct purchases of tangible personal property for use in carrying on the work of such institutions and organizations.

We first consider plaintiffs' assertion that they are charitable organizations within the meaning of the statute. The terms "charitable institution" and "charitable organization" are not defined in the North Carolina Sales and Use Tax Act, G.S. § 105-164.1 *et seq.*; indeed, no definition for the terms is contained in the entire Revenue Act, G.S. § 105-1 *et seq.*

It is a basic rule of statutory construction that where a statute contains no definition of words used therein, the words of the statute are to be given their natural and ordinary meaning. *In re Clayton-Marcus Co.*, 286 N.C. 215, 210 S.E.2d 199 (1974). With respect to taxation statutes, provisions for exemptions are strictly construed and ambiguities are resolved in favor of taxation. *Id.* A taxpayer who seeks the benefit of an exemption has the burden of showing that he comes within the exclusion upon which he relies. *Chemical Corp. v. Johnson, Comr. of Revenue*, 257 N.C. 666, 127 S.E.2d 262 (1962). The rule of strict construction does not, however, require that the statute be "stintingly or even narrowly construed" or that relevant language in the statute be given other than its plain and obvious meaning. *Wake County v. Ingle*, 273 N.C. 343, 347, 160 S.E.2d 62, 65 (1968).

Citing the entrance fees and monthly service fees charged by plaintiffs, as well as the financial resources of the residents, defendant argues that plaintiffs "cater only to the affluent and provide no benefits to legitimate objects of charity." The trial court agreed, concluding the "financial and health limitations required for admission prevent plaintiffs from benefitting a significant segment of humanity and an indefinite class of persons who are legitimate subjects of charity."

We do not believe the General Assembly intended, when it enacted G.S. § 105-164.14(b), that such a narrow construction be accorded the word "charitable", nor do we agree that the residents served by plaintiffs are not "legitimate subjects of charity." "Generally defined, a charitable institution is an organization or other entity engaged in the relief or aid to a certain class of persons, a corporate body established for public use, or a private institution created and maintained for the purpose of dispensing some public good or benevolence to those who require it." *Darsie v. Duke University*, 48 N.C. App. 20, 24, 268 S.E.2d 554, 556, *disc. review denied*, 301 N.C. 400, 273 S.E.2d 445 (1980).

The natural and ordinary meaning of “charitable” is sufficiently broad to include aid and assistance provided for the elderly or infirm without regard to individual poverty. “The concept of charity is not confined to the relief of the needy and destitute, for ‘aged people require care and attention apart from financial assistance, and the supply of this care and attention is as much a charitable and benevolent purpose as the relief of their financial wants.’” *In re Taxable Status of Property*, 45 N.C. App. 632, 638, 263 S.E.2d 838, 842, *disc. review denied*, 300 N.C. 374, 267 S.E.2d 684 (1980), *quoting Central Board on Care of Jewish Aged, Inc. v. Henson*, 120 Ga. App. 627, 171 S.E.2d 747 (1969). We note also that the IRS has recognized that “charitable” in its generally accepted legal sense includes “[p]roviding for the special needs of the aged . . . where the requisite elements of relief of distress and community benefit have been found to be present.” Rev. Rul. 72-124, 1972-1 C.B. 145.

Revenue Ruling [72-124] makes clear that a home for the aged will be deemed “charitable” if it meets the special needs of the elderly such as the need for health care, financial security, and residential facilities designed to meet specific physical, social, and recreational requirements of the elderly. Such a home need not provide direct financial assistance to the elderly in order to be “charitable,” since poverty is only one form of distress to which the elderly as a class are particularly susceptible.

Rev. Rul. 79-18, 1979-1 C.B. 194. *See also* Rev. Rul. 75-198, 1975-1 C.B. 157. Indeed, the North Carolina Department of Revenue has itself recognized plaintiffs as “bona fide nonprofit, charitable organizations” for the purposes of exemption from State corporate income and franchise taxes under other applicable sections of the Revenue Act.

Our decisions in *In re Chapel Hill Residential Retirement Center*, *supra*, and *In re Appeal of Barham*, *supra*, do not control the resolution of this case. In those cases, the issue was whether the property owned by the two non-profit corporations and used as residential care facilities for the elderly, under arrangements similar to those operated by the present plaintiffs, qualified for the *ad valorem* tax exemption provided by G.S. §§ 105-278.6 and 105-278.7 of the Machinery Act, G.S. 105-271 *et seq.* and Article V, § 2(3) of the North Carolina Constitution. We determined that the property did not qualify for the exemption because it was not being held for charitable purposes. The General Assembly responded to our decisions by enacting G.S. § 105-275(32) which specifically excludes from *ad valorem* taxation property owned by “a home for the aged, sick, or infirm . . .

and used in the operation of that home.” In any event, our Supreme Court has recognized that the rules for determining whether property is exempt from *ad valorem* taxes are distinct from those determining whether a corporation is exempt from the taxes imposed by the Revenue Act. *In re Vanderbilt University*, 252 N.C. 743, 114 S.E.2d 655 (1960).

We hold that even construed strictly, the term “charitable organization” easily accommodates the nature of plaintiff corporations. Plaintiffs are clearly engaged in an humane and philanthropic endeavor to aid and assist the rapidly growing class of elderly citizens of this State, and their activities certainly benefit the larger community which only recently has come to realize the problems associated with an aging population. Therefore, the trial court erred in concluding that plaintiffs are not charitable organizations.

Because we have determined that plaintiffs are charitable organizations, they are entitled, pursuant to the provisions of G.S. § 105-164.14(b), to refunds of the sales and use taxes paid by them. We need not determine whether they are also religious organizations, nor is it necessary that we determine whether defendant’s enforcement of the statute violated plaintiffs’ constitutional rights. The judgment ordering defendant to pay such refunds is affirmed, although for reasons different from those stated by the trial court.

Modified and affirmed.

Judges EAGLES and WALKER concur.



Tree and Shrub Walking Guide

The Pines at Davidson is a non-profit continuing care retirement community that was founded in 1988 and is located in Davidson, North Carolina. It sits on over 109 acres of beautiful gardens and surrounding woodlands that provide a diverse plant palette consisting of over 200 species. The development of this plant palette as well as their commitment to provide an educational and appealing landscape to the residents and nearby community has warranted The Pines' recognition by the American Public Gardens Association.



DIRECTIONS

The Tree and Shrub Walking Guide has been organized into two walks that can be completed independently from each other or as a combined tour.

Perimeter Walk
0.75 miles

The Perimeter Walk begins at the Community Center Entrance and follows a counter-clockwise route along the Kimbrough Circle walkway.

Interior Walk
0.30 miles

The Interior Walk begins at the entrance to Magnolia Court and directs walkers through the central Campus Green area of The Pines. It connects to the Perimeter Walk near the wooded area between the Health Center and The Villas.



Trees

Bloom Time	Scientific Name / Common Name
PERIMETER WALK	
July - September	<i>Lagerstroemia indica</i> / Crape Myrtle 1
N / A	<i>Pinus taeda</i> / Loblolly Pine 2
April	<i>Cercis canadensis</i> 'Alba' / White Redbud 3
April	<i>Cercis canadensis</i> / Eastern Redbud 4
June - July	<i>Albizia julibrissin</i> / Mimosa 5
March	<i>Cornus mas</i> / Cornelian Cherry Dogwood 6
April	<i>Prunus</i> 'Okame' / 'Okame' Cherry 7
April	<i>Platanus x acerifolia</i> / London Planetree 8
March - April	<i>Prunus x yedoensis</i> / Yoshino Cherry 9
April - May	<i>Paulownia tomentosa</i> / Empress Tree 10
June - July	<i>Koelreuteria paniculata</i> / Golden Raintree 11
May - June	<i>Cladrastis lutea</i> / Yellowwood 12
June	<i>Syringa reticulata</i> / Japanese Tree Lilac 13
April	<i>Acer palmatum</i> var. <i>dissectum</i> 'Seiryu' / 'Seiryu' Japanese Maple 14
May - June	<i>Liriodendron tulipifera</i> / Tulip Poplar 15
April	<i>Quercus phellos</i> / Willow Oak 16
INTERIOR WALK	
April	<i>Acer saccharum</i> / Sugar Maple A
July - September	<i>Ulmus parvifolia</i> / Chinese Elm B
April	<i>Acer palmatum</i> 'Sango-kaku' / 'Sango-kaku' Japanese Maple C
May - June	<i>Gleditsia triacanthos</i> / Honey Locust D
April - May	<i>Betula nigra</i> / River Birch E
March - April	<i>Morus alba</i> / Mulberry F
March - April	<i>Pinus elliotii</i> / Slash Pine G
May	<i>Magnolia</i> / Magnolia H
March - May	<i>Cornus</i> / Dogwood I
N / A	<i>Ilex x 'Nellie R. Stevens'</i> / 'Nellie R. Stevens' Holly J



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Shrubs



Scientific Name / Common Name

Bloom Time

PERIMETER WALK

1	<i>Leucothoe axillaris</i> / Coast Leucothoe	May
2	<i>Osmanthus fragrans</i> / Fragrant Olive	April
3	* <i>Prunus caroliniana</i> / Carolina Cherry Laurel	April
4	<i>Berberis thunbergii</i> / Japanese Barberry	April - May
5	<i>Mahonia repens</i> / Creeping Mahonia	April
6	<i>Loropetalum chinensis</i> / Loropetalum	March - April
7	<i>Sarcococca confusa</i> / Sweetbox	March
8	<i>Gardenia jasminoides</i> / Gardenia	May - June
9	<i>Ilex cornuta</i> / Needlepoint Holly	April
10	<i>Forsythia x intermedia</i> / Forsythia	March - April
11	<i>Euonymus alatus</i> / Burning Bush	May - June
12	<i>Callicarpa dichotoma</i> / Beautyberry	June - August

INTERIOR WALK

A	<i>Rhododendron x 'George Tabor'</i> / 'George Tabor' Azalea	April
B	<i>Buddleja davidii</i> / Butterfly Bush	July - September
C	* <i>Ilex 'Mary Nell'</i> / 'Mary Nell' Holly	April - May
D	<i>Abelia x grandiflora</i> / Glossy Abelia	May - September
E	<i>Rhododendron</i> / Azalea	April

* - Indicates a shrub specimen that can be categorized as either a large shrub or a small tree.



Perimeter Walk Pathway

Interior Walk Pathway

DID YOU KNOW?

✿ Dendochronology is the scientific method of calculating dates by counting the rings in a tree trunk. Wide rings indicate years with a substantial amount of water, while thin rings represent a year with a drought.

✿ The Mulberry Tree on the Pines' campus is estimated to be over 70 years old. Mulberry tree leaves are the main component in the silkworm diet, thus the trees were brought to North Carolina in hopes of forming a silk industry.

✿ There are approximately 100 species of Pine trees worldwide. Approximately 36 of these species are native to the United States.

✿ The tallest Pine tree is the Sugar Pine (*Pinus lambertiana*) reaching heights of up to 200 feet tall. This is just over half as tall as the Coast Redwood (*Sequoia sempervirens*) which earns the distinction of tallest tree in the world.

✿ One of the oldest trees in the world is a Bristlecone Pine (*Pinus longaeva*) cleverly dubbed 'Methuselah.' It is located in California and estimated to be over 4,750 years old. Its exact location is protected by the U.S. Forest Service to save the tree from any vandalism.



✿ North Carolina is comprised of 3 regions: Mountain, Piedmont, and Coastal. Davidson, NC is located in the Piedmont region of North Carolina. The word "Piedmont" means foot of the mountain.

✿ Pine trees (*Pinus*) are classified as a softwood variety. Softwood comprises an estimated 80% of the world's timber production. It is used for a wide range of products that include structural framing, furniture, millwork and the raw material used to make paper products.

✿ Hardiness zones are a way to measure the average annual minimum temperature that a plant can withstand. The USDA Hardiness zone for Davidson is 7, which equates to an average annual minimum temperature of 0°–10° F.

✿ The state tree of North Carolina is Longleaf Pine (*Pinus palustris*). Longleaf Pines used to cover much of the South but were severely reduced in numbers due to 200+ years of logging. The trees were attractive lumber due to their straight, dense, and rot-resistant wood.



BIRDS AT THE PINES



American Goldfinch

Commonly found in open fields, meadows, orchards, and gardens. It can also be found in open deciduous woodlands.



Eastern Bluebird

Commonly found in woodlands, farmlands, orchards, and suburban areas.



American Robin

Commonly found in woodlands, farmlands, and urban areas.



House Finch

Commonly found in city parks, backyards, urban areas, farmlands, and forest edges.



Cardinal

Official state bird of North Carolina. Commonly found in woodlands, gardens, and low vegetation.



House Sparrow

Commonly found in city parks, backyards, countryside, and farmlands.



Carolina Chickadee

Commonly found in woodlands, and low vegetation. They tend to nest in trees that have holes or cavities.



Northern Mockingbird

Commonly found in Maple, Sweetgum, and Sycamore trees. They tend to perch on the topmost tree branches, and streetlights.



Carolina Wren

Commonly found around buildings. They tend to nest under eaves of buildings, or in holes of porches, flowerpots, and barns.



Tufted Titmouse

Commonly found in parks, orchards, and suburban areas. It can also be found in mixed evergreen-deciduous woodlands.

THE RESIDENT SUPPORT FUND AT THE PINES AT DAVIDSON

The Resident Support Fund provides assistance to those residents at The Pines of modest means who unexpectedly find themselves in a financial crisis, often because they have outlived their financial resources. The Fund is a great comfort to these residents, since it helps to assure that The Pines will remain their home. A major charitable initiative at The Pines, The Resident Support Fund has been made possible through contributions from current and future residents, board members, employees, family members and friends.

All proceeds from the sale of this book will be directed to The Resident Support Fund.



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