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## In economic slump, seniors paying more for retirement community services

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Settled into a retirement community in North Dallas, Marian Yordy can't hide from an unsettling economy.

It's the little things that hurt, from having to pay as much as \$50 for a ride to and from the beauty shop to being charged a quarter for a carton of milk that used to be free.

The small economic changes at her independent-living apartment complex – the Treemont Retirement Community – could be a sign of trouble in the larger retirement world: What you get could be less than you expected.

"We've had anecdotal reports that this is happening around the country, and if it's true, it represents a troubling trend," said Rafael Ayuso, a spokesman for AARP Texas.

"Housing is the single largest expense for older Americans, who already are stressed out about the state of the economy."

If seniors are living independently in a retirement community, as opposed to being in an assisted-living facility or a nursing home, they have virtually nowhere to take their complaints.

Yordy, 81, said she started noticing a hit on her pocketbook in recent weeks. Hoping to halt the trend, she complained to management, started a petition drive among the residents and, eventually, alerted a number of government agencies.

"They couldn't help me," said Yordy, who moved into the community in September 2007.

### Transportation concerns

Treemont's managers insist no operational changes have been made in recent months at the Harvest Hill Road retirement community. They did say, however, that one of the home's two vans is being sold to cut expenses, which resulted in a stricter transportation schedule for the residents. Most are in their 80s and no longer drive.

Rides to doctors' appointments, grocery stores and church services are free as long as they follow the prearranged schedule. Anyone needing to go elsewhere, such as the beauty shop or post office, must pay \$15 to \$50 per round trip.

"I'm trying to operate efficiently," Doris Lea, the home's former acting director, said last week. Lea is also a regional vice president of operations for Horizon Bay Senior Communities, which manages more than 75 retirement complexes around the country.

"We always do our best to minimize any impact on our residents," she said. "We've been here a long time, and we have a very good reputation."

Nonetheless, the recent departure of several popular Treemont staff members – including the home's director and activities director – has been upsetting to some residents, Lea said. They were not laid off. More than 200 seniors live at Treemont, which was built in the mid-1970s as Dallas' first luxury retirement community. After 35 years, the three-story complex still has a well-maintained appearance with large common areas for dining and social activities.

### Unhappy over changes

It is difficult to gauge the level of discontent among the residents, although a dozen people indicated to Yordy that they were unhappy with some of the recent changes, she said.

Several residents said they were afraid to challenge management and risk being evicted from a place that they otherwise enjoy living and that is more affordable than other retirement communities.

"I believe Treemont management needs some help – or interference," one resident wrote in a note to Yordy. "But I believe this will not bring good results!"

Ramon Arguelles, 81, was willing to join Yordy in her public protest, speaking to a reporter and posing for a photograph with his fellow resident in front of the building.

It reminded him of the times he would take his complaints to the DISD board of trustees when he was a Spanish teacher in Oak Cliff.

"I had to give up my car, so they give you only 20 minutes to buy groceries when you take the van," said Arguelles, a Treemont resident for more than a year.

The complex, like other independent-living facilities for seniors, has no government oversight. So whatever their age, seniors living in these communities must fight their own battles.

"Independent-living facilities are not licensed," said Suzanna Swanson, director of the long-term care ombudsman program at The Senior Source. The program visits and investigates complaints at assisted-living facilities and nursing homes in Dallas County.

"Occasionally, our agency does get calls and complaints about independent-living facilities," she said. "But we don't have jurisdiction."

And there is little recourse when the changes do not violate a lease agreement, said Yasmin Thomas, project director for the Texas Tenants Union, which helps renters understand their housing rights. "If management is within its legal rights to do this, the changes should have been phased in," she advised. "I can relate to it with my own parents because people are stunned that they can't expect what they had been getting."

Yordy conceded that she could move out, but she professed to love her fellow residents and, especially,

her small, one-bedroom apartment, for which one of her daughters is paying almost \$1,200 a month.

Even those residents who pay more to get additional services consider Treemont a bargain. Everyone gets three meals a day and the promise of an active social life.

"They promised me yoga and real exercise classes," said Yordy, who tries to stay active.

Until further notice, she and the other residents are attending an exercise class led by the home's van driver.

Lea said she asked the driver to take over several classes a week because she didn't want to cancel them.

"Sometimes, the smallest change can feel dramatic," Lea said.

What's for dinner?

Residents also complained about apparent cost cutting in the home's menus, including the loss of favorites such as crab cakes and chicken-fried steak.

Lea said the menu was streamlined on a five-week cycle that features "always available" items such as chicken, fish and hamburger.

Most upsetting was the disappearance three weeks ago of Treemont's "Mystery Ride." On Saturdays, a group of 20 or so residents used to head out for an unknown destination with the van driver providing a history lesson en route.

"I've learned so much about Texas on that ride," said Dorris Repass, 89, who grew up in West Texas and enjoyed visiting Denton, McKinney and Tyler.

Lea promised to restore those rides as soon as an activities director is hired.

But she disputed the residents' claim that Treemont had begun charging unfair transportation fees for rides in the van. However, when pressed, she said she was not certain that previous administrators had ever charged transportation fees, although the practice was allowed under lease agreements signed by every resident.

"We're trying to administer the contract the way we said we'd do it," she said. "I cannot take 200 people to their beauty shop every day."