

## Bob and Beth Carlson Interview, May 2017

J: June

B: Bob

C: Beth

J: Hello.

B: Hello.

C: Hello.

J: Hi, is this Bob and Beth?

C: Yes.

J: Hi, this is June Hussey in Tucson. Thanks for calling in. I appreciate your time.

B: You're welcome.

J: Ok, well, first of all I just have to tell you we have something in common. My maiden name is Carlson.

C: Oh, imagine.

J: In fact, my middle name is Elizabeth.

C: My first name, yes.

J: Yeah, so I feel like maybe we're long-lost relatives or something.

B: Could be.

J: But anyway to begin with I just wanted to go over why we do these interviews and what we are looking to gain from them. And then I'll let you do most of the talking. But we do a lot of these interviews with residents like yourselves of not only The Fountains at Millbrook but other communities across the country that Watermark manages. And the reason we do them is to get to know them, get to know something about you, your life and what brought you to the decision to move to a retirement community in general. And then more specifically why you chose The Fountains. So the reason we do that is because we like to share your story with folks out there who may not have ever set foot on a retirement community campus and don't really know that option exists or maybe they just forgot to plan about their future and need to do so. So we think that by sharing our residents' stories it helps people that are just in the beginning of that process to kind of learn a little bit about how to go about it. So that's the why. And I have to let you know also that we are recording this conversation just so you are aware of that. And the reason we're recording it is so that we can get an accurate transcript. We want to make sure we get all of your sentiments and quotes exactly right. But if you should happen to divulge something that is too personal to share and you think of it after the fact, please just say so during the conversation. Say, "Oh, please don't publish this part." And then we will strike it from the transcript, ok?

B: Ok.

J: Alright, so that's all the rules. What I'm going to do at this point is invite you to share a little bit about yourselves. You can take turns or you can go back and forth, whatever makes more sense to you. And just give us an idea of who you are, where you were born, where you grew up, where you've lived most of your life, the kinds of interests you have, maybe something about your family, whatever you want to share, it's all fair game and that will just give us the foundation to build the rest of the interview on. And you can take as long as you like and share as much as you like. So just go ahead and get started either one of you, when you want.

C: Ok, Bob will start.

B: I was born in Brooklyn in 1928. This is really moving closer to home. Our last residence was in Silver Spring, Maryland. I'm an Episcopal clergyman. And doing that I've done a variety of things. I've taught at theological seminary, I've worked on the bishop's staff and I've been a parish clergyman. And it's been a very interesting life. I've really worked with a number of older people in the course of my years and I realize some of the problems and opportunities of being older. And fortunately we're both in pretty

good health so we were thinking of a place that would be good for us now but might be good also if either one of us became somewhat disabled and needed some assisted care. So we were looking for a place where that was available and where that might be a possibility.

J: Very good, what about you Elizabeth?

C: I was born in Ohio and we moved to New York when I was 13 years old. We have three children, three boys. I was a social worker. My career was social work, which I loved. I worked mostly as a clinician, as a therapist and a general social worker. I'm a person who likes to be involved in a lot of things. I don't like to be isolated. I liked the idea of coming to a community. One of the main things I like is the fact that I can do all kinds of activities without having to get into the car and go. I mean we have yoga here. We have exercise classes every day. Of course I don't go every day but you can go to as many or as few as you like. We play bridge, we sing in a group, we attend concerts, we go on field trips to restaurants and things. That's what I like to do because I don't want to vegetate. So I saw this as, I like being in community. I've worked in community all my life, you know, being a clergy wife and being a social worker. And so I thought that being in a community like this would be a good thing to do. And of course one of the motivations was we realized that we weren't going to be able to drive very much longer. And without being able to drive in the places that we've lived, you are absolutely, you cannot go anywhere. And here they go on trips, they take care of taking us to the doctor's, to the store and as I say, with all the activities here, I don't miss the driving very much, maybe a little bit. That was one of my big motivations was knowing that I couldn't drive anymore.

J: And tell me where were you living just before you moved to The Fountains?

C: We were living in Silver Spring, Maryland. We were living there for 20 years because we've lived in a lot of different places. I realized I've lived in six states. But we went back to Maryland because one of my sons was living there and we had a lot of friends there from when Bob had a parish there. We were there for about 20 years, 23 years actually, in retirement. We had a lot of friends in the D.C. area. But our son who was living in that area was getting ready to move to Florida. We had picked out a place near there where we were going because I had already decided that this is what we were to do. But then our daughter-in-law who lives up here, our oldest son lives up here, said, "Well, no, you've got to be near family. You've got to be near at least one of your kids." So this place worked out because it's halfway between our oldest and our youngest sons so we actually have their support and help. And it's nice to be close to both of them.

J: So how did you discover The Fountains at Millbrook?

C: Well my daughter-in-law, as soon as she realized that we were getting serious about this, because we had been talking about it for a couple years before we were ready to do it, and as soon as she heard we were serious, she started looking around. And she discovered three different places around here. And we went to all three of them and we liked this one the best by far. We had also looked at a lot of them in Maryland. We were serious about wanting to come to this kind of a community so she found it for us and she took us around to all of them. As I say, this was just the best choice for us. For one thing, I wanted to be in a cottage rather than in the apartment building because I like to garden and I can still plant around the cottage and things. And I like walking. It just appealed to me more than living in an apartment building. So that was a big consideration for me because not all of the places like this have cottages. Some of them just have the apartment building and that idea didn't appeal to me too much.

J: And so before you decided to move to New York, you were sold on the idea of a retirement community and you had actually picked one out in Maryland?

C: Yes because there was one there that was founded by the Episcopal Church and a lot of our retired clergy friends were there and so I went there one time for some other reason and I looked at it and I thought, "Oh man, this is what I want." I also love the idea that I don't have to cook at dinner time.

J: A lot of people tell me that. Compared to the one that you had picked out in Maryland, how is The Fountains at Millbrook different or the same?

C: Well, I think it's pretty much the same from what I can see. I think it's pretty much the same. And also I like a beautiful campus because I'm very into trees and plants and things. I was a little disappointed that there was no lake here but other than that it compared very favorably to the other places that we had seen.

J: And you've been there since last August? So almost coming up on a year this summer.

C: Yeah, we've been here eight months.

J: And so tell me about the move from your home. How did that go?

C: That was one of the biggest traumas of my life, selling the house.

J: A lot of people dread that part so talk about that and what made it easier, just tell us about it.

C: Well, it's very difficult because we had only lived there 23 years but we had downsized once but during this 23 years we seem to have accumulated a lot more. I think we had 1000 books and managed to get rid of several hundred of them but still have a lot. It was a difficult experience. Giving up the car was the hardest thing for my husband and then getting settled in a situation. The downsizing was horrible and I think everybody finds that to be the truth.

J: Did you have help or were you trying to do it yourselves?

C: No, we did it all by ourselves. I know that there was help available but the thing is, it's the decisions that had to be made about what to go and what to keep, well, nobody else can make those decisions for you. We did it all ourselves except of course for the actual move. It was hard and then getting everything settled in the cottage. And of course I suppose this happens to everybody but we found that we brought some things we shouldn't have and left some things that we should have brought. I suppose everybody goes through that. And it just took me a long time to get everything settled and categorized and unpacked. It was a difficult experience, it really was.

J: What about as far as the timing of your move, do you feel like you did it at the right time? Or do you wish you had done it sooner?

C: No, I think we did it at the right time. I think the deciding factor there was giving up the car.

J: Was there a particular reason you gave up the car? I mean a lot of people drive that shouldn't be driving, why did you decide to give up the car?

C: Well, I gave up driving three or four years ago but my husband didn't. But my children were saying that he had to stop driving. I mean, he wouldn't listen to me.

B: I always listen to you.

C: They thought that he needed to give up driving. I mean, you know, it's kind of hard to tell but I knew I couldn't drive anymore. When I'd drive on the road especially in the new place like this, when I'd go out on the road I would just, the traffic, the traffic had just doubled from when we first moved to Silver Spring. You could get into DC in a half hour now it was taking an hour. And I just got so I couldn't tolerate the traffic anymore. And the idea of being in that traffic, I just couldn't do it.

J: How about you, Bob, was that a hard decision for you to acquiesce to?

B: Yes it was, I guess giving up the car was hard because I had been driving since I was 17 and had a car I guess since I was 18. So it's a sense of losing mobility, which is not easy. You have to be able to grieve about some of the things you lose. But also rejoice in the things you are discovering (inaudible) here. I think the community certainly is one of the things that we both like and we like the activities. We like the arts, we like drama, we like music. And there are opportunities to participate in these things. Being near New York it still possible to go to New York City for things. And The Fountains has lots of activities that we enjoy. And one of the first things we did was take a cruise with a couple of other people from here and enjoyed their company. It had very good company. We've enjoyed the people here.

J: Where did you go on your cruise?

B: I'm sorry?

J: Where did you go on the cruise?

B: The Caribbean.

J: Oh, nice.

C: They go out of New York so it, it was easy to do.

J: Wow, let's see, now your kids obviously, how far away do they live from you? You said you are right in between a couple of your kids, where are they?

C: Our oldest son is in Tivoli which is about 45 minutes from here and our youngest one is in Brooklyn which is more like two hours but still closer than we were in Silver Spring.

B: And our two youngest grandchildren love it up here, playing in grandma and grandpa's cottage and going sleigh riding on the hill. We really enjoy their enjoyment of this place.

J: That's nice, so do you get to see them much?

C: Yes, yes, of course they live in an apartment house in the city so it's a treat for the kids to come up here and see all the horses and the countryside and to be able to play on the campus here because there's a lot of room here and a lot of places to walk and things like that.

J: That's nice. So even though giving up the car seemed like a horrible thing that you had to grieve for, how would you describe your life now as far as mobility goes, do you feel like you're stuck?

B: I don't think so. I think we appreciate the fact that there's transportation to so many things here. It's readily available.

C: We have to go on their schedule. That's a little difficult. It takes a while to get used to that. But once you get used to it, you just fall into the patterns and it's ok.

B: We just have to schedule ahead a little more carefully.

C: Yeah, for shopping trips and of course they take us to church on Sunday which is really nice.

B: We found a very compatible church.

C: That was lucky.

B: A very fine rector.

J: That's nice. So describe for me a typical day there. You live in a cottage, do you take your meals at the community or do you cook? You said you didn't like to cook so.

C: I used to like to cook but I'm tired of it. No, we eat breakfast and lunch here in the cottage and then we go to the dining hall for our dinner every night.

J: And have you gotten to know many of your neighbors there in Millbrook?

C: Well, at The Fountains here yes. It's away from Millbrook, it's really out in the country. I appreciate the nature part of it. We have, that took a little while because we were so busy at first trying to get the house settled and all the things, getting all those books in shelves. Yeah, but we are now feeling, I feel like there's a lot of people that I'm talking to now and having conversations with.

J: Have you had a chance to take any of the classes through Watermark University?

C: Well, yes, yeah, I guess we do just a little bit of everything. We sing in The Songbirds, the chorus group that's once a week here.

B: We enjoy singing of course.

C: We go to yoga, well, I said that before. We go to yoga every week. I don't know, we do a lot.

B: The films are certainly a good resource. We've enjoyed that.

C: Well and there have been a lot of concerts and things that have been very good. And of course I don't know whether we mentioned we play bridge once a week. I love to play bridge.

J: It sounds like you do a lot of things together as a couple.

C: Yes, mostly we do them together. I go to the book club which he doesn't but most of the things we both do.

J: Well, what advice might you have to share with other couples out there. I know it's fairly common for one person to want to move and another person to not want to move, so were you always in agreement or did you have to do some convincing?

C: No, I think we were always in agreement.

B: I think so, yes.

C: We had both decided maybe as much as 10 years ago that would be our eventual plan.

J: And do you think that is because of your experience in your careers that you knew of people in, maybe situations that weren't as great as what you are experiencing there, that helped you make that decision early on?

C: Yeah, definitely, definitely, yes, both of our jobs were community type jobs and I mean I was a therapist and he was a priest so we knew a lot about how people lived and their lives.

B: Adjusted to change in their lives.

C: And how they felt about an awful lot of things. It probably did influence us.

J: What would you say, I mean you are both professional counselors, but what would you say to people out there that are maybe not open to change and feeling stuck in their habits?

C: Bob, did you say at the beginning what you told me before about the support? You expressed that so well about feeling that we were, that is a real big thing, feeling that although we wanted to be in independent which we are in independent living but we also wanted the support that it was there when we needed it.

B: And that's a very reassuring thing.

C: That's really what I tell friends when I'm trying to tell people they should go to this kind of a community. That's one of the things I tell them, that you are totally independent but yet you know that support is there if you need it.

B: A backup.

C: And that feeling, when you're older, I think you really need that when you're older. Well, particularly if you don't have a lot of family close by to help you.

J: What else? Is there anything else that we haven't discussed that I haven't asked that you think is important for people to know that maybe are in the place of their lives where they are starting to think about this?

B: I think it was helpful for us to make a visit here and spend a couple of days. Of course that's not like being here for a long period of time but sampling the life of the community I think is helpful. Perhaps people need to be able to do that for even longer periods, maybe a couple of weeks or months to sense what it feels like to live in a community like this.

J: You came what for just a couple of days and stayed in a guest suite?

C: Just a couple days, yeah.

J: And that helped you make up your mind?

C: Well, no we just did it to make sure that we were not making a mistake, that's the only reason we did it. We were sold on it but we thought well, just to make sure, we better test it out.

J: Right, did you discover anything after you moved in that was a pleasant surprise or that you didn't know you were going like so much?

C: Well, I didn't know that I was going to like living in this little cottage as much as I do. It's just the right size. And we have a patio outside our back door which even in the apartment people have balconies. And so I didn't realize how much I would like it. I kept thinking that it would be too small, too small but it turns out it isn't at all. That was a surprise, yeah.

J: How is the cottage laid out?

C: We have two bedrooms and two baths but we happen to have something which almost nobody else does which is a dining alcove. Most of the places I've seen you have to eat in the living room. And we have our own washer/dryer which is a tremendous thing in our cottage here. I was just totally surprised at how much I love the cottage.

J: And the spring has sprung just about there. Have you started your garden or is it too early?

C: Still too early here. You have to wait until the end of May.

B: But we've been able to sit out on the patio on nice early evenings and have a glass of wine. It's a very pleasant thing to be able to enjoy nature that way, the soft breeze and warm temperatures.

J: Very nice, what's the view like from your patio?

C: We have a wonderful view, we have a prize view. There's a huge lawn going down and then you can see all the woods and the mountains and the mountains in the distance. It's really attractive.

J: Had you ever been to that part of New York before you lived there?

C: Yes, because my son, the oldest one, we sent him up here to go to college and he fell in love with it. The Hudson Valley is just a beautiful beautiful place. He fell in love with it in and never came home.

B: He fell in love with a local girl, too.

C: And got married and stayed here so we visited them quite a bit and I did love this area almost from the first I saw it. It's colder than Maryland so I was a little worried about the winter but I knew that it was a really beautiful place.

J: And you don't have to shovel the snow.

B: Right, wonderful.

J: Very good.

C: They mow the lawn so I can just do the fun things.

J: Right, very good. Well, it sure sounds great. I want to thank you both for your time. I believe I've covered all the questions I had on my list. Is there any else you can think of that you'd like to say?

C: No, I think we covered everything pretty thoroughly.

B: It's been very pleasant talking to you.

J: Well, likewise. I appreciate your time and I hope that you have a lovely rest of the day there in Millbrook. I can picture it, it's a beautiful place.

B: Lovely.

J: I'm glad that you found it and I thank you again for your time.

C: You're welcome.

J: Ok, take care now.

C: You too, ok.

J: Alright, bye-bye.

C: Bye.

B: Bye.