



NC DEPARTMENT OF  
**HEALTH AND  
HUMAN SERVICES**

ROY COOPER • Governor  
MANDY COHEN, MD, MPH • Secretary  
MARK PAYNE • Director, Division of Health Service Regulation

VIA EMAIL ONLY

August 6, 2021

Terri Baker  
terri.baker@jeacorp.com

**Exempt from Review – Acquisition of Facility**

**Record #:** 3628  
**Date of Request:** August 2, 2021  
**Facility Name:** Charlotte Square  
**Type of Facility:** Adult care home  
**FID #:** 970658  
**Acquisition by:** SH1 Carmel PropCo, LLC  
**Business #:** 3420  
**County:** Mecklenburg

Dear Ms. Baker:

The Healthcare Planning and Certificate of Need Section, Division of Health Service Regulation (Agency) determined that the project described above is exempt from certificate of need (CON) review in accordance with G.S. 131E-184(a)(8). Therefore, the above referenced business may proceed to acquire the health service facility identified above without first obtaining a CON. The Agency's determination is limited to the question of whether the above referenced business would have to obtain a CON if the current owners of the health service facility do in fact sell it to the business listed above. Note that pursuant to G.S. 131E-181(b): "*A recipient of a certificate of need, or any person who may subsequently acquire, in any manner whatsoever permitted by law, the service for which that certificate of need was issued, is required to materially comply with the representations made in its application for that certificate of need.*"

If the business listed above does acquire the facility, you should contact the Agency's Adult Care Home Licensure Section to obtain instructions for changing ownership of the existing facility.

It should be noted that this Agency's position is based solely on the facts represented by you and that any change in facts as represented would require further consideration by this Agency and a separate determination regarding whether a certificate of need would be required. If you have any questions concerning this matter, please feel free to contact this office.

Sincerely,

Julie M. Faenza  
Project Analyst

Micheala Mitchell  
Chief, Certificate of Need

cc: Adult Care Licensure Section, DHSR  
**NC DEPARTMENT OF HEALTH AND HUMAN SERVICES • DIVISION OF HEALTH SERVICE REGULATION**

**HEALTHCARE PLANNING AND CERTIFICATE OF NEED SECTION**

LOCATION: 809 Ruggles Drive, Edgerton Building, Raleigh, NC 27603  
MAILING ADDRESS: 809 Ruggles Drive, 2704 Mail Service Center, Raleigh, NC 27699-2704  
<https://info.ncdhhs.gov/dhsr/> • TEL: 919-855-3873



July 28, 2021  
NC Division of Health Service Regulation  
Certificate of Need Section  
2704 Mail Service Center  
Raleigh, NC 27699-2704

RE: Change of Ownership – Charlotte Square – License # HAL-06-087

To Whom It May Concern:

Please accept this as notification that SH1 Carmel PropCo, LLC (the “Proposed Purchaser”) has agreed to purchase the real and personal property comprising of the Facility, Charlotte Square. Concurrently with its purchase of the Facility, the Proposed Purchaser intends to lease the Facility to SH1 Carmel OpCo, LLC (the “Proposed Licensee”), changing the licensee from CSL LeaseCo, Inc. to SH1 Carmel OpCo, LLC. The anticipated closing date is September 1, 2021.

At the time of transition, JEA Senior Living, a Washington state-based operator of senior living communities, will begin managing the community.

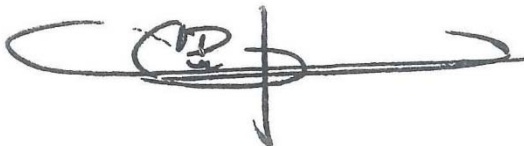
We understand that we need to obtain a letter of exemption from review from the Certificate of Need prior to the obligation to purchase the building. Can you please provide the letter of exemption to:

SH1 Carmel Opco, LLC  
5101 NE 82<sup>nd</sup> Avenue, Ste. 200  
Vancouver, WA 98662

We would appreciate receiving an email copy of this letter to speed the process of the change of ownership along so we can have our license approved on or before September 1, 2021.

You can email the letter to Terri Baker, Licensing Coordinator, at [terri.baker@jeacorp.com](mailto:terri.baker@jeacorp.com). Also, if you have any questions regarding this change of ownership, please feel free to contact Terri Baker at 503-998-5810.

Sincerely,



Christopher Belford  
Chief Executive Officer  
JEA Senior Living

**From:** [Mitchell, Micheala L](#)  
**To:** [Waller, Martha K](#)  
**Subject:** FW: [External] Charlotte Square - Change of Ownership - Need letter of exemption from review from the CON  
**Date:** Monday, August 2, 2021 3:21:26 PM  
**Attachments:** [Letter to CON Section - request for letter of exemption 7.28.21.pdf](#)

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Hi Martha,

Do I forward these requests to you? If I don't let me know where they go. I think I received another one for material compliance today or Friday (can't remember).

Thanks,

Micheala

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**From:** Terri Baker <terri.baker@jeacorp.com>  
**Sent:** Monday, August 2, 2021 3:16 PM  
**To:** Mitchell, Micheala L <Micheala.Mitchell@dhhs.nc.gov>  
**Subject:** [External] Charlotte Square - Change of Ownership - Need letter of exemption from review from the CON

**CAUTION:** External email. Do not click links or open attachments unless you verify. Send all suspicious email as an attachment to [Report Spam](#).

Good Afternoon,

We are in the processing of purchasing Charlotte Square, effective 9/1/21. It is our understanding that we need to obtain a letter of exemption from review from the Certificate of Need.

Attached please find our official request to obtain this letter of exemption.

Thank you and please do not hesitate to contact me if you have any questions.

**Terri Baker**  
**Finance and Licensing Coordinator**  
[terri.baker@jeacorp.com](mailto:terri.baker@jeacorp.com)



**JEA Senior Living**  
5101 NE 82nd Avenue  
Suite 200  
Vancouver, WA 98662  
360-984-2615 Direct  
503-998-5810 Cell  
360-254-9442 Phone  
360-254-1770 Fax  
[www.jeaseniorliving.com](http://www.jeaseniorliving.com)

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