



# April 2024

## M.E.S.H. Monthly Report: Board of Directors

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*WhiteStone*  
A MASONIC & EASTERN STAR  
COMMUNITY  EST. 1912

Founded on fellowship. Inspired by you.

WhiteStone A Masonic & Eastern Star Community | 700 S. Holden Road | Greensboro, NC 27407

# TABLE OF CONTENTS

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- VISIBILITY ..... 2
  - WhiteStone Community Visibility - Leadership*
  - WhiteStone Fraternal Visibility - Leadership*
  - WhiteStone Resident: Committees, Services, & Support*
  - WhiteStone Board of Directors: Committees, Services, & Support*
  - Life Care Services [LCS]: Services & Support*
  - WhiteStone Expansion: Project(s) & Reporting (Frank L. Blum)*
  - WhiteStone Technology Infrastructure: Project(s) & Reporting*
  - WhiteStone New Resident: Prospecting Events*
  - WhiteStone Employee: Service Anniversaries*
  - WhiteStone Employee: New Hires & Promotions*
  - WhiteStone Employee: Recognition, Recruitment, & Retainment*
  
- DASHBOARD KPI’S ..... 5
  - Summary*
  
- COVID-19 TASKFORCE & UPDATE(S) ..... 6
  - Overview*
  
- DIRECTOR’S REPORTS..... 6
  - Health Center Administration ..... 7*
  - Assisted Living & Memory Care..... 8*
  - Human Resources ..... 9*
  - Marketing ..... 12*
  - Plant Operations & Environmental Services ..... 13*
  - Fraternal Friendship..... 14*
  - Finance ..... 15*
  - Food & Beverage ..... 15*
  - Community Life Services ..... 16*
  - Chaplain & Spiritual Services ..... 17*



## VISIBILITY APRIL 2024

### WHITESTONE COMMUNITY VISIBILITY – LEADERSHIP:

DATE(S):	MEETING(S)/EVENT(S)
<b>Weekly:</b>	<i>Women’s Coffee – Fellowship Hall 9am-10:30am, Wednesdays</i>
<b>Weekly:</b>	<i>Men’s Coffee – Fellowship Hall 9am-10:30am, Fridays</i>
<b>Weekly:</b>	<i>Wine Down – Fellowship Hall 3:30pm-5pm, Fridays</i>
<b>Monthly:</b>	<i>Masonic Luncheon – 1<sup>st</sup> Tuesday of every month</i>
<b>April 4<sup>th</sup></b>	<i>Spring On Site Job Fair</i>
<b>April 10<sup>th</sup></b>	<i>Food &amp; Beverage Appreciation Luncheon</i>
<b>April 10<sup>th</sup></b>	<i>Resident Council Leadership Annual Meeting</i>
<b>April 11<sup>th</sup></b>	<i>Food Show By Performance Food Service (product sampling)</i>
<b>April 18<sup>th</sup></b>	<i>Resident Panel – Marketing Event</i>
<b>April 24<sup>th</sup></b>	<i>Volunteer Appreciation Reception</i>

### WHITESTONE FRATERNAL VISIBILITY

DATE(S):	MEETING(S)/EVENT(S)
<b>Monthly:</b>	<i>Masonic Luncheon at WhiteStone [1<sup>st</sup> Tuesday] Main Dining Room</i>
<b>Monthly:</b>	<i>MESH Chapter #379 Meeting [1<sup>st</sup> Tuesday] Fellowship Hall</i>
<b>Monthly:</b>	<i>MESH Lodge #771 Meeting [2<sup>nd</sup> Saturday] Fellowship Hall</i>
<b>April 12<sup>th</sup></b>	<i>OES Foundation Board Meeting</i>

### WHITESTONE RESIDENTS: COMMITTEES, SERVICES & SUPPORT

DATE(S):	MEETING(S)/EVENT(S)
<b>Weekly:</b>	<i>Women’s Coffee - Fellowship Hall 9am-10:30am, Wednesdays</i>
<b>Weekly:</b>	<i>Men’s Coffee - Fellowship Hall 9am-10:30am, Fridays</i>
<b>Weekly:</b>	<i>Caregiver Support Group - Woodbury Game Room 1p-2p, Thursdays</i>
<b>Weekly:</b>	<i>Worship Service – Streamed on Channel 1390 &amp; Chapel 10am-11am, Sundays</i>
<b>Monthly:</b>	<i>WhiteStone Resident Committee: Marketing [1<sup>st</sup> Wednesday]</i>

DATE(S):	MEETING(S)/EVENT(S)
<b>Monthly:</b>	<i>WhiteStone Resident Committee: Spiritual [1<sup>st</sup> Wednesday]</i>
<b>Monthly:</b>	<i>WhiteStone Resident Committee: Activities [2<sup>nd</sup> Thursday]</i>
<b>Monthly:</b>	<i>WhiteStone Resident Committee: Food &amp; Beverage [2<sup>nd</sup> Thursday]</i>
<b>Monthly:</b>	<i>WhiteStone Resident Committee: Buildings &amp; Grounds [2<sup>nd</sup> Monday]</i>
<b>Monthly:</b>	<i>WhiteStone Resident Committee: Campus Care Alliance [3<sup>rd</sup> Tuesday]</i>
<b>Monthly:</b>	<i>WhiteStone Resident Committee: Auxiliary [3<sup>rd</sup> Wednesday]</i>
<b>Monthly:</b>	<i>Resident Council Meeting [3<sup>rd</sup> Thursday] Fellowship Hall</i>
<b>As Needed:</b>	<i>WhiteStone COVID Task Force</i>
<b>April 1<sup>st</sup></b>	<i>First Monday's Lecture Series – IL Resident Joel Dobson</i>
<b>April 10<sup>th</sup></b>	<i>Resident Council Leadership Annual Meeting</i>
<b>April 10<sup>th</sup></b>	<i>Food &amp; Beverage Appreciation Luncheon</i>
<b>April 11<sup>th</sup></b>	<i>Food Show by Performance Food Service [product sampling]</i>
<b>April 18<sup>th</sup></b>	<i>Resident Panel – Marketing Event</i>
<b>April 18<sup>th</sup></b>	<i>Steen Family Produce [On Site Farmer's Market]</i>
<b>April 23<sup>rd</sup></b>	<i>Ted Fritz – Triad Honor Flight [Send Off Celebration]</i>
<b>April 24<sup>th</sup></b>	<i>Ted Fritz – Triad Honor Flight [Welcome Home Celebration]</i>

### WHITESTONE BOARD OF DIRECTORS: COMMITTEES, SERVICES & SUPPORT

DATE(S):	MEETING(S)/EVENT(S)
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### LIFECARE SERVICES [LCS]: SERVICES & SUPPORT

DATE(S):	MEETING(S)/EVENT(S)
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<b>April 25<sup>th</sup></b>	<i>Jacob Elliott Site Visit</i>
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<b>April 26<sup>th</sup></b>	<i>LCS/WhiteStone - Road to 95 Blueprint [follow up Zoom call #2]</i>
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### WHITESTONE EXPANSION: PROJECT(S) & REPORTING

DATE(S):	MEETING(S)/EVENT(S)
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### WHITESTONE TECHNOLOGY INFRASTRUCTURE: PROJECT(S) & REPORTING

DATE(S):	MEETING(S)/EVENT(S)
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**WHITESTONE NEW RESIDENT: PROSPECTING EVENT(S):**

DATE(S):	MEETING(S)/EVENT(S)
Monthly:	<i>New Resident Orientation &amp; Lunch [3<sup>rd</sup> Wednesday]</i>
April 18 <sup>th</sup>	<i>Resident Panel – Marketing Event</i>

**WHITESTONE EMPLOYEE: RECOGNITION, RECRUITMENT, & RETAINMENT:**

DATE(S):	MEETING(S)/EVENT(S)
Bi-Weekly	<i>New Hire and General Orientation</i>
April 4 <sup>th</sup>	<i>Spring On Site Job Fair</i>
April 10 <sup>th</sup>	<i>Food &amp; Beverage Appreciation Luncheon</i>
April 23 <sup>rd</sup>	<i>Picnic on the Lawn</i>
April 26 <sup>th</sup>	<i>National Pretzel Day</i>

**WHITESTONE EMPLOYEE: APRIL ANNIVERSARIES**

SERVICE DATE:	EMPLOYEE NAME:	DEPARTMENT	YEARS OF SERVICE:
4/4	<i>Peggie Williams</i>	<i>Nursing</i>	<i>7 yrs</i>
4/6	<i>Craig Glosson</i>	<i>Food &amp; Beverage</i>	<i>1 yr</i>
4/13	<i>Tracy Neal</i>	<i>Nursing</i>	<i>1 yr</i>
4/16	<i>Archana Patel</i>	<i>Executive Assistant</i>	<i>10 yrs</i>
4/19	<i>Ellie Kaviani</i>	<i>Nursing</i>	<i>8 yrs</i>
4/29	<i>Nikki Stafford</i>	<i>Business Services</i>	<i>5 yrs</i>
4/30	<i>Erica Timmons</i>	<i>Food &amp; Beverage</i>	<i>4 yrs</i>



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## KEY PERFORMANCE INDICATORS – APRIL 2024

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### **GREEN** *Light Key Performance Indicators [KPI's]: Summary of Findings –*

YTD NOI	Actual of 36,123 on budget of (511,773), a positive variance of 547,897.
YTD REVPOR	REVPOR budget of 5,665 with actual 6,266.
YTD IL Closings	Budget of 12 with actual closings of 25.
YTD Net Sales IL	Budget of 4 with actual net sales at 18.
IL MTD Occupancy	Average occupancy of 185.97 on budget of 174.50.

### **YELLOW** *Light Key Performance Indicators [KPI's]: Summary of Findings –*

HC MTD Occupancy	Average occupancy for the month at 74.40 with budget at 80.27.
YTD EXPPOR	EXPPOR YTD budget at 6,690 with actual 6,807, a (1,8%) variance.

### **RED** *Light Key Performance Indicators [KPI's]: Summary of Findings –*

Memory Care MTD Occupancy	Averaged 4.00 on budget of 7.5
AL MTD Occupancy	Averaged 10.13 occupied for the month on a budget of 20.50.
Days in AR	23% of total AR 90 days outstanding or \$307,334. Benchmark is 15%.



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## COVID-19 TASKFORCE & UPDATE(S) – APRIL 2024

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*No COVID updates for this month. The Community remains free of COVID-19 cases.*



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## WHITESTONE LEADERSHIP TEAM: DIRECTORS REPORT

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DIRECTOR NAME	DEPARTMENT
<i>Mr. Mark Lewis, LNHA</i>	<i>Executive Director</i>
<i>Mr. Josh Hillegass, LNHA</i>	<i>Health Services Administrator</i>
<i>Mr. Ray Robinson</i>	<i>Assisted Living Manager</i>
<i>Mrs. Tracy Armwood, SPHR</i>	<i>Director, Human Resources</i>
<i>Ms. Marie Dunn</i>	<i>Director, Sales &amp; Marketing</i>
<i>Mr. Rick Berkimer</i>	<i>Director, Plant Operations</i>
<i>Mr. Robert Reese Sr.</i>	<i>Director, Environmental Services</i>
<i>Mrs. Jenna Grant</i>	<i>Director, Fraternal Friendship Program</i>
<i>Ms. Nikki Stafford</i>	<i>Director, Finance</i>
<i>Mr. Jonathan Szarke</i>	<i>Director, Food &amp; Beverage</i>
<i>Mrs. Gina Prevost, LRT/CTRS</i>	<i>Director, Community Life Services</i>
<i>Mrs. Misty McAden</i>	<i>Director, Spiritual Services &amp; Chaplain</i>
<i>Ms. Archana Patel</i>	<i>Executive Assistant</i>

# I. HEALTH CENTER ADMINISTRATION REPORT

## APRIL 2024 Overview:

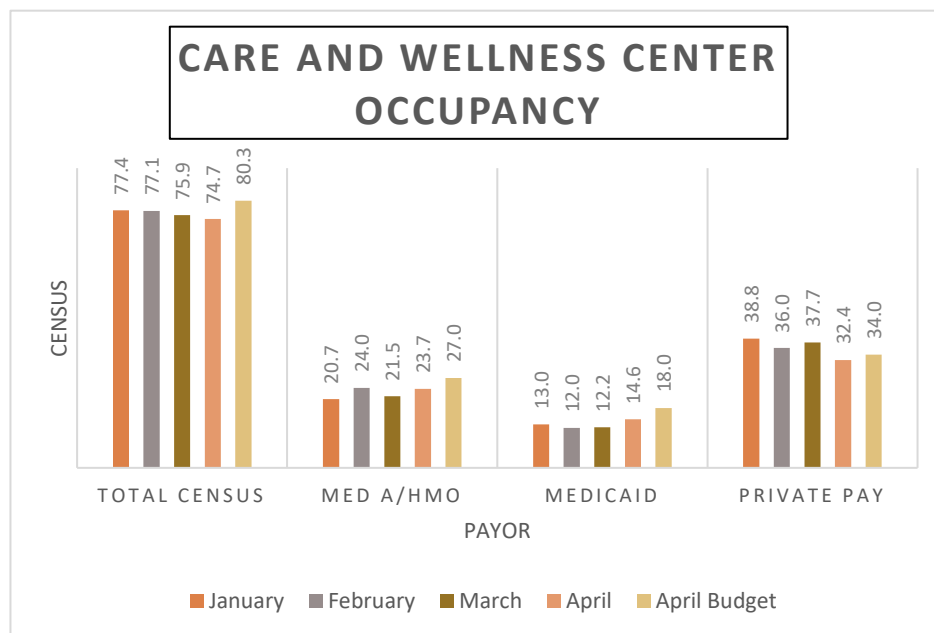
Much of our time in April was spent continuing to develop and grow our Leadership Team in the Care and Wellness Center. With a new Clinical Lead, we've dedicated numerous hours to process development, improvement in efficiencies, and developing an ongoing plan to further our Center. We look forward to continuing this growth as we finalize our teams across the WhiteStone Campus.

In April, the Care and Wellness Center was pleased to capture a handful of new employees that we are excited to bring on board. We have hired Deseree Piece, Social Worker and we have hired Kishera Reid, Staff Development Coordinator. Both individuals will fulfill important roles in our Care Center, and we look forward to the positives they'll bring to our team! Our team would like to thank the Human Resources Team here at WhiteStone who provided numerous interviews which resulted in hires for both our Nurses and C.N.A.s over this past Month. Please expect future communications regarding all the new hires for the Care and Wellness Center.

Our community was thankful to have received a remote visit from Jon Back, Clinical Specialist, with Life Care Services during the 1<sup>st</sup> week of April. Jon's focus on onboarding our new Director of Clinical Services, Crystal Condy, and to provide an evaluation of our community was much appreciated. Please see further information regarding his visit during the Clinical Update of this report.

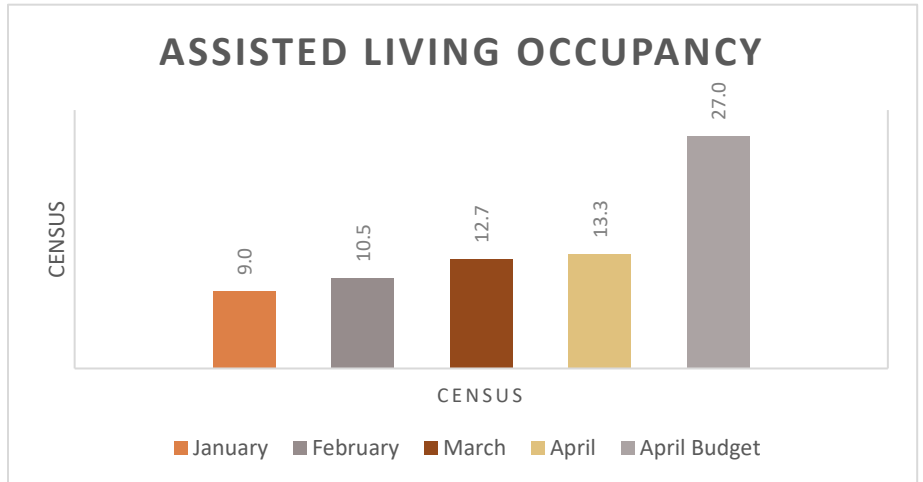
### Census Updates:

The Care and Wellness Center experienced a slight decrease in overall total census level this month, but we were able to maintain a strong Medicare / Managed Care census. We attribute our decrease in census to a handful of expirations of our long-term care Residents during the Month. Our Team is continuing to market and outreach for all of our services, long-term care and rehabilitation as we continue to grow and foster greater census.





Assisted Living Census remained steady throughout the month of April. While we did not see growth in our census numbers, there was attrition out of Assisted Living to other levels of care which we were able to offset with the addition of new Residents. Our team continues to have a heightened focus on improving our outreach and development of strategies to both market and educate on the benefits of Assisted Living.



**Clinical Updates:**

During the week of April 1<sup>st</sup>, our Life Care Services Clinical Consultant, Jon Back completed a remote review of our community. Jon’s primary purpose during this remote review was to dedicate an extended period to onboard and train Crystal Condy, Director of Clinical Services, to her role at WhiteStone. Our community received an overall score of 89% as a result of Jon’s visit with areas of improvement noted to be social services and event management. Please see the scorecard from this visit below:

COMMUNITY		Overall Score		CLINICAL SPECIALIST	
Whitestone		89%		Jon Back	
REVIEW COMPLETION DATE				<input type="checkbox"/> Onsite Visit <input checked="" type="checkbox"/> Virtual Visit	
04.04.24				Heartfelt Connection Certification <input checked="" type="checkbox"/> <input type="checkbox"/> S <input checked="" type="checkbox"/> NO <input type="checkbox"/> <input type="checkbox"/>	
REVIEW COMPONENTS		Individual Component		Budgeted Cen 64    Actual Census 73	
				<input type="checkbox"/> IF 100% <input type="checkbox"/> No Revi <input type="checkbox"/> *	
Resident Rights	100%				
Free from Abuse, Neglect and Exploitation	100%				
Quality of Life/Activities of Daily Living	91%				
Assessment & Comprehensive Care Plans	82%				
Life Enrichment and Heartfelt Connections	100%				
Social Services/Behavior Management	55%				
Bowel and Bladder Management	91%				
Event Management	64%				
Nutrition/Hydration Management & Dialysis	91%				
Pain Management	91%				
Skin and Wound Management	73%				
Discharge Planning	100%				
Daily Clinical Meeting	100%				
Weekly Risk Meeting		*			
Physician and Nursing Services	91%				
Medication/Order Management	100%				
Food/Beverage and Dining Services		*			
Infection Prevention and Control	100%				
Physical Environment		*			

## II. ASSISTED LIVING & MEMORY CARE REPORT

### Last months overview

*April focused on building a census for Assisted Living and Memory Care. During the month, we yielded three signings for Assisted Living. We were added to the naming of the Auxiliary committee and built a more comprehensive understanding of what assisted Living means at Whitestone. Building a culture for the new assisted living facility is among the chief concerns of the AL operations committee, which meets weekly to cultivate relationships among staff, residents, and families.*

*In addition to establishing a census, Assisted Living and memory care have been able to staff the first floor fully and comprise a plan to fill the second and third floors. We have added respite services in Memory Care and look to expand our efforts. The group has identified many potential residents who are appropriate for the services provided in the Rice Retreat. Activities and dietary staff are working to provide resident center care in their respective areas.*

### Accomplishments for the month

*Assisted Living has been able to in-service staff to improve resident care. The subjects ranged from hospice care to medication administration for Med Aide and LPN staff members. We look to work on dementia training in the coming month to arm our team with the tools necessary to deal with behaviors related to cognitive decline. Census was able to grow with one move-in and three signed contracts.*

*We continue to host a complete list of activities geared toward highlighting the benefits of assisted Living, which is among the team's chief accomplishments. These include programs such as the National Pretzel Day celebration and planning for the Kentucky Derby Party led by volunteers and staff. We are excited to offer even more opportunities to chat about the needs and wants of assisted living and memory care residents.*

### Plans for the next month

*Assisted living and memory care is looking to increase the census while educating staff on the importance of resident-centered care in the following month. Our current laurels include the following:*

*AL/MC is working toward three admissions in May. As we aim to hit the 90% mark, there are census needs in both AL and MC.*

- Increase education and protocol for documentation by auditing current residents and improving the admissions process.*
- Developing our respite program for AL/MC.*

### Issues and Concerns

*There are five opportunities for the assisted living and memory care community. With constant focus on the following items, the team will experience success in accomplishing organizational goals. The five items are listed below.*

- Training staff on the daily requirements of operating a thriving assisted living and memory care community.*
- Staff schedules and changes in schedule due to needs across the community.*
- Staff access to communication and updating of resident conditions.*
- Meetings with ombudsman and county monitor to develop relationships.*
- Creating protocols to circumvent the growing pains of developing AL/MC*

### III. HUMAN RESOURCES REPORT

#### APRIL 2024 OVERVIEW

##### Turnover

12.92% turnover YTD 2024. Compared to 10.14% through April 2023.

##### Overtime

1111.89 hrs of OT for April. Compared to 899.32 hrs for April 2023. An increase of 212.57 hrs on the month and total YTD increase in overtime from last year by 1433.12 hrs.

##### Workers Compensation

We have recently been informed that Kathleen Church whose worker comp claim was denied has retained an attorney. We do have an assigned attorney to work with us on this case. There are no further updates at this time.

##### EEOC & Legal Updates

On May 1, 2024 we received a dismissal and notice for rights from the EEOC related to the charge brought forth by Ki-Esha Turner. They sited no findings and would not be proceeding with further investigation. We are still waiting on a response related to the Loretta Clark charge.

##### Budgeted FTEs

Total April FTEs: 151.27

Total Budgeted FTEs: 180.12

Variance: 28.85 [FTEs **UNDER** budget]

##### Recruiting

Our onsite job fair, Careers and Coffee that was April 4th was a success. We had 29 registered candidates and made 16 offers. The Grinde Café coffee truck was on site with free Joe for the candidates and we partnered the event with staff appreciation for all team members.

As noted in previous reports, we have struggles to obtain and retain RNs and lost several LPNs due to lower pay rates. We continue to depend on agency for nurses. We significantly raised both the RN and LPN wage scale. Taking RN from a minimum of \$35.69 to \$39.00/hr and LPNs from a minimum of \$26.78 to \$30/hr. Since making this market adjustment we have been successful in transitioning offers into hires.

##### Recruiting summary for March 2024

- 533 New Candidates
- 83 Scheduled interviews
- 33 offers with 26 hires.

##### Retention

We have a full calendar for employee appreciation this year. Below is our schedule for May:

- National Nurse’s Day – May 6th thru May 11<sup>th</sup>
- National Burger Day – All Staff Cookout May 24<sup>th</sup>

<b>MONTHLY TURNOVER</b>		
	<b>2024</b>	<b>2023</b>
<b>Jan</b>	2.23%	2.89%
<b>Feb</b>	3.40%	0.41%
<b>Mar</b>	3.44%	4.68%
<b>Apr</b>	3.86%	2.16%
<b>May</b>		2.62%
<b>Jun</b>		2.04%
<b>Jul</b>		4.35%
<b>Aug</b>		5.77%
<b>Sep</b>		2.94%
<b>Oct</b>		3.62%
<b>Nov</b>		1.05%
<b>Dec</b>		2.11%
<b>TOTAL</b>	<b>12.92%</b>	<b>34.64%</b>

**Recommendations and/or Other Information**

We continue to see wage pressures across the board in most positions. As noted above, we made an adjustment to our wage scale for nurses. We will need to be prepared for CNAs and other roles as we continue to see wages for these roles rise at a more rapid rate.

**Job Openings Report:**

<b>Reported on: 5.5.24</b>					
<b>IMMEDIATE OPENINGS</b>					
<b>Job Title</b>	<b># of Openings</b>	<b>New Candidate Pipeline</b>	<b>Attempting to Contact</b>	<b>Interviews Scheduled</b>	<b>Offers Pending</b>
Charge Nurse - 1st shift Full time	2	2	11		
Charge Nurse - 1st shift Part time	3	2	11		
Charge Nurse - 2nd shift Fulltime	3	1	21	4	1
Charge Nurse - 2nd shift Part time	3	1	21	4	
Charge Nurse - 3rd shift Fulltime	2	0	1	2	1
CNA - 1st shift Part Time	2	25	69	10	1
CNA - 2nd shift Fulltime	4	25	69	10	1
CNA - 2nd shift Part time	4	25	69	10	1
CNA - 3rd shift Part Time	3	0	1	2	1
MDS - PT	1	0	6	2	
Nurse Supervisor - 3rd shift FT	1	1	1	1	
Fitness Coordinator	1				
Recruiter	1	3	11	4	1
Maintenance Tech	1	1	8	3	
Custodian	1	15	17	3	1
Housekeeper	1	41	6	1	
total openings:	33			Total Offers:	8
				Interviews Scheduled:	32
		Openings after Offers:	25		
Ready for Orientation:	15 news hires for 5/9/24				

## IV. MARKETING & SALES REPORT

Monthly Marketing Report					
April 2024					
<b>Current Occupancy:</b>	189/211	90%			
<b>Sold Occupancy:</b>	202	96%			
<b>Available Units:</b>	<u>Villa</u>	<u>Cottage</u>	<u>IL Apts</u>	<u>Res Apts</u>	
	0	1	1	7	
<b>Explanation:</b>	<u>Villa</u>	<u>Cottage</u>	<u>IL Apts</u>	<u>Res Apts</u>	
		2-A	324	144 Ben	343 Ben
				146 Ben	349 Ben
				241 Ben	145 Ben
				244 Ben	
<b>Sales:</b>	4	324, 315, 532, 315	<b>Cancel:</b>	1	315
<b>Move-In: (April)</b>	6	422, 432, 321, 233 433, 322	<b>Upcoming MI:</b>	705 RL	6-D
				346	411
				221	907 FMD
<b>Transfers:</b>				3 SRC	532
				6-H	315
				2-D	534
				324	
<b>MO (April):</b>	4	145, 110, 523, Cott 2-A			
<b>Upcoming MO:</b>	<u>Unit</u>	<u>reason</u>	<u>Est MO</u>		
	419	HLOC	5/6/2024		
	415	HLOC	5/8/2024		
	341	HLOC	5/26/2024		
	3 SRC	HLOC	TBD		
<b>Upcoming Events:</b>	5/9/2024	DD - Wait Listers: Presentation by LivNow			
	5/11/2024	Family Day Festivites!			
	5/14/2024	TRLA (Business Networking)			
	5/21/2024	Discovery Luncheon (prospect)			
	5/29/2024	New Resident Orientation			
<b>Department Highlights:</b>	Roadmap to 95% in IL				
	Campus Wide Road to 95%				

## V. PLANT OPERATIONS / ENVIRONMENTAL SERVICES REPORT

### PLANT OPERATIONS

#### Last Month's Activities

- *Met with Architects from Steele Group (walk-in cooler) and Stimmel (Gay Terrace driveway) to stimulate movement on both projects and gain historical perspective of each.*
- *Progressed on rotunda sound dampening project.*
- *Completed air filter, smoke detector, CO detector, and sara alert preventive maintenance.*

#### Accomplishments for the Month

- *Hired 1 of 2 vacant security positions.*
- *Opened recruiting for 1 maintenance tech.*
- *Obtained updated drawings for drive from main campus to Gay Terrace.*

#### Plans for the Next Month (May)

- *Receive drawings from architects for main kitchen cooler project.*
- *Select generator contractor to replace CWC generator.*
- *Order parts for the rotunda sound dampening project. Schedule installation upon receipt.*
- *Schedule annual dryer vent cleaning*
- *Remove all plywood walls inside of Gay Terrace property.*
- *Rotunda project back in progress. Parts will be ordered in May, expect 6-8 weeks for deliver.*

#### Issues and Concerns

- *All projects moving at a slower pace than expected. Focused on road/path to Gey Terrace, Kitchen cooler project, CWC generator replacement project.*

### ENVIROMENTAL SERVICES

#### Last Month's Activities:

- *Conducted in-services with staff.*
  1. *No fault attendance policy recap!! (Always)*
  2. *Department Vision & Goals for 2024 (Always) Staff*
  3. *Continuing Customer Service Care towards our residents & staff*
  4. *Introduction of new door hangers & Q R for online reviews on the back of the door hanger*

#### Accomplishments for the Month are as follows:

- *Introduce Team Cleaning to help reduce cleaning times and help with cleaning other areas of the community.*
- *Established uniform dress code for all staff.*

- *All staff must be in Khaki pants by 05-17-24.*

### **Plans for the next Month**

- *Continue working with staff updating on & off schedules*
- *Attendance issues*
- *Celebrate Mother's Day.*
- *Create Custodian schedules for carpet vacuuming and cleaning.*

### **Issues and Concerns**

- *Hiring proper staff for our community (Housekeeping)*
- *Several staff members still have attendance issues.*
- *Reduce Turnover of staff.*

## **VI. OUTREACH PROGRAM: THE FOUNDATION**

### **April 2023 OVERVIEW**

#### **Assistance:**

- *Outreach Totals of \$8, 663 for a total of (7) members:*
  - *(7) long term members*
  - *(0) short term member (Emergency)*
- *WhiteStone residents receiving assistance (17)*
  - *(13) Independent Living*
  - *(3) assisted Living*
  - *(1) Memory Care*

#### **New Referrals & Outreach:**

- *7 potential referrals are being processed by our Outreach Coordinator*
  - *(4) are for scholarships (Move-In Assistance or Current Resident)*
  - *(2) are for Long Term Assistance*
  - *(1) for Short-Term / Emergency Assistance*

**If you know of a member needing assistance, please contact:**

*Jenna Grant*  
*Director of Fraternal Friendship*  
*Email: [jgrant@meshhome.org](mailto:jgrant@meshhome.org)*  
*Phone: (336) 601-5593.*

## VII. FINANCE REPORT

**Medicaid** – while our Medicaid census has been lower than budget, we do have 8 Medicaid Pending applications. Of those 8, 4 are IL residents that transitioned to the CWC and 4 are skilled admissions that have received NOMNC and financially will need Medicaid unless discharged. I've been working on Private Pay communication with residents and families to collect on outstanding balances. Josh and I are working on discharge planning and hopeful that with a new social worker joining the team we can establish tighter controls over communication and discharge to avoid private billings or Medicaid transitions.

The first quarter for the community finished strong. A strong IL census and move in's exceeding budget have contributed to actuals exceeding budget as well as a strong billing month for March.

**Ongoing** -- Year end audits and filings will be the focus until the May board meeting. As a reminder of the annual reports completed see below:

- Annual Audited Financial Statements – Audit Committee approved that draft of the audit to be presented to the board at the May 11th meeting
- Annual Disclosure Statement Compilation – Information has been sent to CLA – Nikki needs to make a couple of adjustments on the 2024 forecast and send those edits as well
- 990 Tax Return
- Cost Report (Medicare and Medicaid) information will be sent the week of May 13th for this filing
- 401k Audit & 5500 Retirement Tax Return (much appreciation as Tracy does most of this)

**Empower** – the official letter to Empower regarding the 2019, 2020 and 2021 compliance testing around profit sharing contributions has been sent certified mail to Empower's General Counsel. No update regarding the receipt of the letter is available currently. A representative from Empower did contact Tracy. I requested that Tracy have him reach out to me, but I have not heard anything. Nikki did email Empower and is following up regarding the receipt of the letter.

Sharon Koppenhaver works with LCS Reliance and has been working with WhiteStone for the past year on Accounts Receivable and then transitioned into billing for Medicare A and Managed Care claims for the health center. Currently she is out on medical leave as she is expecting her first child. Please keep Sharon in your thoughts and prayers for a healthy delivery and recovery.

## VIII. FOOD & BEVERAGE REPORT

**Health Center Kitchen Manager** - Rick Edwards, CDM has accepted this role, and is scheduled to be in our next orientation class. He has been at his previous property since 2007 and has considerable experience beyond that as well. We are excited that he is joining our team.

**Staff Appreciation Meal** - Several members of the Food and Beverage Committee contributed to a meal for the staff catered by Bravo Italian restaurant. Committee members also helped serve. Desserts were also prepared by Phyllis Jones. Everything was delicious and very well received.

**IL Kitchen** - We added a new Sous Chef to our team. Damone Cook has been doing a great job and has prepared Chef specials that have been very well received.

**IL Dinner service line** - We continue to work on speeding up our service line during dinner. We've begun posting our daily menu at the host stand, which seems to help.



**Performance Foodservice Food Show** - We had an in-house food show hosted by Performance. They lined up multiple vendors to sample out products to residents. Everyone that attended enjoyed it, and we've solicited feedback to make some new selections of products that were especially good.

## IX. COMMUNITY LIFE SERVICES REPORT

### Staffing Updates:

- Stable with current employees
- Have the following positions open (will hire for these as I get the green light):
  - 1 full time in Assisting Living (holding off on hiring for this until we admit more residents to Assisted Living 2<sup>nd</sup> Floor)

### Independent Living Programming:

- Total Number of Activities: 91
- Total Number of Sessions: 202
- Total Number of Cancellations: 3
- Total Participation: 3121
- Average Participation: 15.5 (~16)
- Participation Percentage: 93.4%
  - 85/91 activities had participants.
- Total number of check-ins: 322

### Changes since February:

- Total Number of Activities increased by 8 (9.6% Increase)
- Total Number of Sessions increased by 22 (12.2% Decreasse)
- Total Participation increased by 716 (29.8% Increase)
- Average Participation increased by 2.2 (16.5% Increase)
  - (Note: Average = Total Participation/Total Number of Sessions)
- Participation Percentage increased by 3%
- Total Number of Check-Ins decreased by 10 (3.2% Increase)
- 6 Sessions of Intergenerational Activities (Chess with Students, intergenerational scrapbook)

### Other Items:

- Family Day Planning for May 11th 2024
- I plan to Audit the One Call Now List against our current resident list in Independent Living to make sure we have all residents in there.
- Veterans Day Planning committee to meet monthly to begin making plans for the Veterans Day program here at WhiteStone.
- Working on an overnight trip in the fall – closer to Christmas – to the Biltmore House in Asheville – residents wish to see the Chihuly Exhibit there and to see Biltmore decorated for Christmas.
- Continuing to focus on new IL residents that are moving in – getting to know them, get them involved, etc.
- Working on uploading resident pictures to touchtown/uniguest and in to Point Click Care as we get them (this is ongoing)

- *Farmer's Market in April and it did not quite work out so we have a new one coming in May every other week – on site at WhiteStone.*
- *Working on keeping email list updated for CWC families as well as a separate list for AL families.*
- *Nurses Week Prep – we are making a board that has all of our Nurse's names on them.*
- *Lifelong Learning Opportunities – exploring this for our Blueprint Meeting*
- *Chit Chat and Care Center Connections every month*
- *Host List in CWCon uploading resident pictures to touchtown and in to Point Click Care as we get them (this is ongoing)*
- *Farmer's Market to start end of March every other week – on site at WhiteStone.*
- *Working on keeping email list updated for CWC families.*
- *Lifelong Learning Opportunities – exploring this for our Blueprint Meeting*
- *Chit Chat and Care Center Connections every month*
- *Host List in CWC*

## **X. CHAPLAIN & SPIRITUAL SERVICES REPORT**

### **Sunday services**

- *4 regular Chapel services*

### **Funerals officiated**

- *1 Funeral – Dewey Kivett at Chapel*

### **Pastoral Encounters**

- *CWC – 44+ (some with family present)*
- *AL – 24+ (some with family present)*
- *IL – 29+ (grief support with family as well)*
- *Employee – 4 (phone calls, etc.)*

### **Weekly Bible studies/worship**

- *CWC – 4*
- *AL – 4*
- *IL – 2*

### **Support Groups**

- *RISE x2*
- *HOPEFUL x1*

### **Meetings**

- *CWC daily report*
- *“traffic” meeting*
- *Spiritual Support Committee*
- *Auxiliary Committee*
- *Resident council*

### **Special Event**

- *Seder meal demonstration*

### **Miscellaneous**

- *attended IL coffees and other activities as able.*
- *continued card ministry*
- *prepared articles for newsletters*
- *provided grief support.*
- *occasional lunch/dinner walk throughs to greet residents.*
- *meals with residents*
- *Resident orientation*

### **Working on the following**

- *Bible Studies for IL*
- *planning a small area for a meditation room open to all faiths*
- *continued support group planning*
- *encouraging volunteer opportunities*
- *planning another visit from Rabbi*
- *planning Temple visit*

### **On hold**

- *planning another panel for “difficult conversations”*