



January 2025

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

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

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VISIBILITY JANUARY 2025

WHITESTONE COMMUNITY VISIBILITY – LEADERSHIP

DATE(S):	MEETING(S)/EVENT(S)
Weekly:	<i>Women's Coffee – Fellowship Hall 9am-10:30am, Wednesdays</i>
Weekly:	<i>Men's Coffee – Fellowship Hall 9am-10:30am, Fridays</i>
Weekly:	<i>Wine Down – Fellowship Hall 3:30pm-5pm, Fridays</i>
Monthly:	<i>Masonic Luncheon [1st Tuesday] Main Dining Room</i>
Monthly:	<i>Resident Council Meeting [Last Thursday] Fellowship Hall</i>
Monthly:	<i>New Resident Orientation & Lunch [3rd Wednesday]</i>
January 22nd	<i>New Resident Orientation</i>
January 23rd	<i>Resident Council Meeting</i>

WHITESTONE FRATERNAL VISIBILITY - LEADERSHIP

DATE(S):	MEETING(S)/EVENT(S)
Monthly:	<i>Masonic Luncheon [1st Tuesday] Main Dining Room</i>
Monthly:	<i>MESH Chapter #379 Meeting [1st Saturday] Fellowship Hall</i>
Monthly:	<i>MESH Lodge #771 Meeting [2nd Saturday] Fellowship Hall</i>
January 7th	<i>Masonic Luncheon</i>
January 21st	<i>NCMF Board Meeting</i>

WHITESTONE RESIDENTS: COMMITTEES, SERVICES & SUPPORT

DATE(S):	MEETING(S)/EVENT(S)
Weekly:	<i>Women's Coffee - Fellowship Hall 9am-10:30am, Wednesdays</i>
Weekly:	<i>Men's Coffee - Fellowship Hall 9am-10:30am, Fridays</i>
Weekly:	<i>Caregiver Support Group - Woodbury Game Room 1p-2p, Thursdays</i>
Weekly:	<i>Worship Service – Streamed on Channel 1390 & Chapel 10am-11am, Sundays</i>
Monthly:	<i>WhiteStone Resident Committee: Marketing [1st Wednesday]</i>
Monthly:	<i>WhiteStone Resident Committee: Spiritual [1st Wednesday]</i>
Monthly:	<i>WhiteStone Resident Committee: Activities [2nd Thursday]</i>
Monthly:	<i>WhiteStone Resident Committee: Food & Beverage [2nd Thursday]</i>
Monthly:	<i>WhiteStone Resident Committee: Buildings & Grounds [2nd Monday]</i>
Monthly:	<i>WhiteStone Resident Committee: Campus Care Alliance [3rd Tuesday]</i>

DATE(S):	MEETING(S)/EVENT(S)
Monthly:	<i>WhiteStone Resident Committee: Auxiliary [3rd Wednesday]</i>
Monthly:	<i>WhiteStone Employee Gratitude Initiative Committee</i>
Monthly:	<i>Resident Council Meeting [Last Thursday] Fellowship Hall</i>
As Needed:	<i>WhiteStone COVID Task Force</i>
January 7th	<i>Masonic Luncheon</i>
January 20th	<i>Level of Care Transition Presentation</i>
January 22nd	<i>New Resident Orientation</i>
January 30th	<i>Marketing Event Lunch</i>

WHITESTONE BOARD OF DIRECTORS: COMMITTEES, SERVICES & SUPPORT

DATE(S):	MEETING(S)/EVENT(S)

LIFECARE SERVICES [LCS]: SERVICES & SUPPORT

DATE(S):	MEETING(S)/EVENT(S)
January 24th	<i>LCS/WS BluePrint – Road to 95 follow up call [Zoom]</i>

WHITESTONE EXPANSION: PROJECT(S) & REPORTING

DATE(S):	MEETING(S)/EVENT(S)

WHITESTONE TECHNOLOGY INFRASTRUCTURE: PROJECT(S) & REPORTING

DATE(S):	MEETING(S)/EVENT(S)

WHITESTONE NEW RESIDENT: PROSPECTING EVENT(S):

DATE(S):	MEETING(S)/EVENT(S)
Monthly:	<i>New Resident Orientation & Lunch [3rd Wednesday]</i>
January 30th	<i>Marketing Event Lunch</i>

WHITESTONE EMPLOYEE: RECOGNITION, RECRUITMENT, & RETAINMENT:

DATE(S):	MEETING(S)/EVENT(S)
Bi-Weekly	<i>New Hire and General Orientation</i>

DATE(S):	MEETING(S)/EVENT(S)
January 17th	<i>Popcorn Bar</i>
January 20th – 24th	<i>Activities Professionals Week</i>

WHITESTONE EMPLOYEE: JANUARY ANNIVERSARIES

EMPLOYEE NAME:	YEARS OF SERVICE:	DEPARTMENT:	SERVICE DATE:
<i>Joel King</i>	<i>1 yr</i>	<i>Maintenance</i>	<i>1/4</i>
<i>Lashena Brooks</i>	<i>3 yrs</i>	<i>Nursing</i>	<i>1/6</i>
<i>Uriah Farrar</i>	<i>3 yrs</i>	<i>Nursing</i>	<i>1/6</i>
<i>Cynthia Carrison</i>	<i>1 yr</i>	<i>EVS</i>	<i>1/18</i>
<i>Otoniel Santiago Moreno</i>	<i>1 yr</i>	<i>Maintenance</i>	<i>1/18</i>
<i>Cecilla Wilson</i>	<i>1 yr</i>	<i>Nursing</i>	<i>1/18</i>
<i>Sherella Edwards</i>	<i>2 yrs</i>	<i>Nursing</i>	<i>1/19</i>
<i>Ashley Thorpe</i>	<i>15 yrs</i>	<i>EVS</i>	<i>1/25</i>
<i>Mary McMillan</i>	<i>16 yrs</i>	<i>Business</i>	<i>1/28</i>
<i>Walter Edmond</i>	<i>14 yrs</i>	<i>EVS</i>	<i>1/31</i>

KEY PERFORMANCE INDICATORS – JANUARY 2025

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

YTD NOI	Actual of 293,529 on budget of (95,144), a positive variance of 388,673.
YTD IL Closings	Budget of 2 with actual closings of 2.
YTD Net Sales IL	Budget of 2 with actual net sales at 1.
IL MTD Occupancy	Average occupancy of 199.55 on budget of 196.
Memory Care MTD Occupancy	Averaged 9.32 on budget of 7.5.
HC MTD Occupancy	Average occupancy for the month of 77.26 with budget of 77.5
AL MTD Occupancy	Averaged 21.23 occupied for the month on a budget of 17.5.
YTD EXPPOR	EXPPOR YTD budget at 6,992 with actual 6,277, a +10.23% variance.
YTD REVPOR	REVPOR budget of 6,673 with actual 7,232 a +8.37% variance.

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

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

Days in AR	Days in AR average of 20.6 versus target of 18. 43% of total AR 90 days outstanding versus benchmark of 15%.
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COVID-19 TASKFORCE & UPDATE(S) – JANUARY 2024

For the month of January, we experienced a decline in the number of positive cases of COVID-19. There were only 5 positive cases reported in Independent Living. The necessary precautions to safeguard others and slow the virus from spreading within our community were put into place, per CDC guidelines. Visitation to the Care Center was limited and mandatory mask precautions were initiated. Isolation precautions and modified services were put in place for Independent Living residents. We will continue to monitor and track positive cases on campus.

WHITESTONE LEADERSHIP TEAM: DIRECTORS REPORT

DIRECTOR NAME	DEPARTMENT
Mr. Mark Lewis, LNHA	Executive Director
Mr. Josh Hillegass, LNHA	Health Services Administrator
Mrs. Rachel Atencio	Assisted Living Manager
Mrs. Tracy Armwood, SPHR	Director, Human Resources
Ms. Debi Bryant	Director, Sales & Marketing
Mr. Joel King	Director, Plant Operations
Mr. Robert Reese Sr.	Director, Environmental Services
Mrs. Jenna Grant	Director, Fraternal Friendship Program
Ms. Nikki Stafford	Director, Finance
Mr. Jonathan Szarke	Director, Food & Beverage
Mrs. Gina Prevost, LRT/CTRS	Director, Community Life Services
Mrs. Misty McAden	Director, Spiritual Services & Chaplain
Ms. Archana Patel	Executive Assistant
Ms. Crystal Condry	Director, Clinical Services

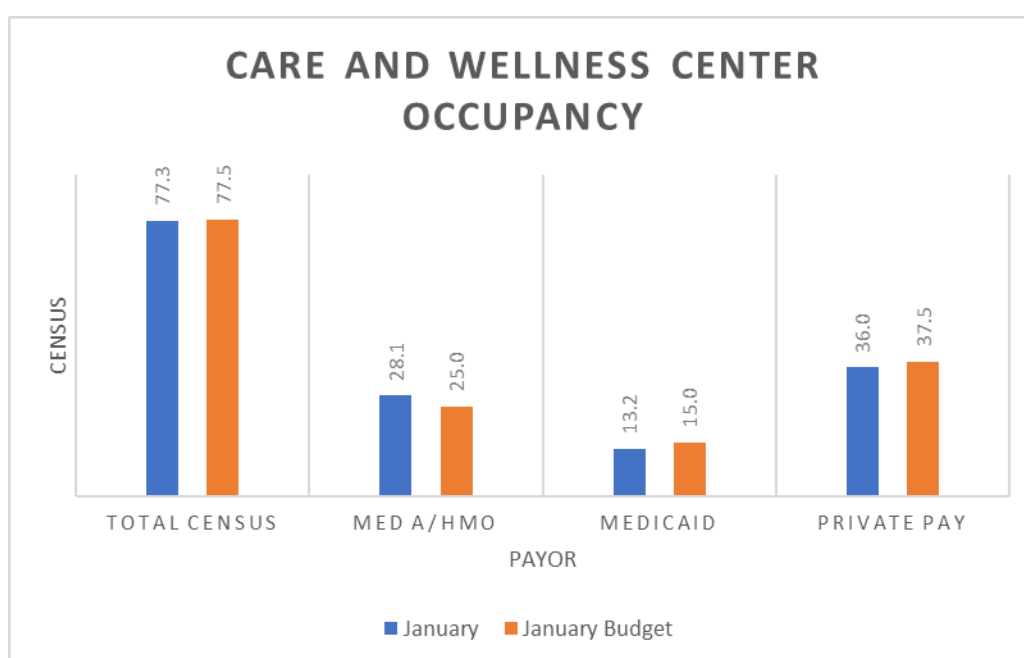
HEALTH CENTER REPORT

January 2025 Overview

I'm happy to announce that we've hired an Assisted Living Manager for our Community! Rachel Atencio will be joining our Community in this role on February 13th. Rachel previously had worked with WhiteStone as a Nurse in our Care and Wellness Center, but she rejoins our team with a greater background in leadership of Assisted Living and Memory Care. We look forward to the experience that she'll bring to our thriving Assisted Living and Memory Care, and we look forward to the next levels that she'll bring us to.

Census Updates

The Care and Wellness Center maintains a strong census and continues to meet budget as we begin the 2025 year. We'll continue to maintain a strong focus on both our Medicare A and HMO payors as we move throughout this year.

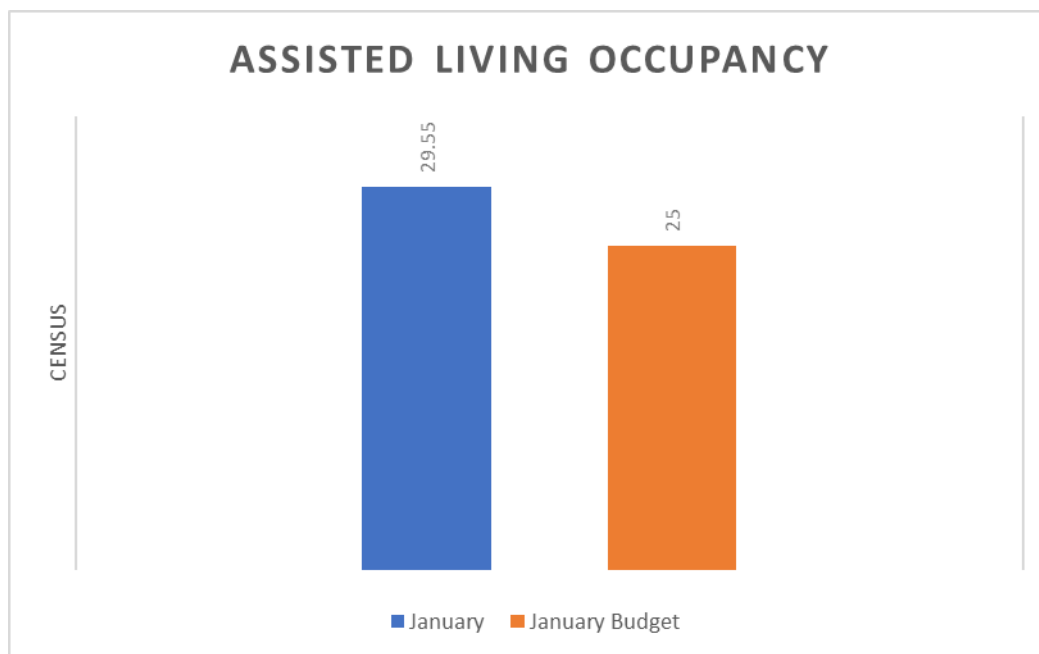


Clinical Updates

Life Care Services announced a change in structure for their Clinical Specialist Roles. WhiteStone was impacted by this change and Jon Back, Clinical Specialist, will no longer be supporting our Community in this capacity. We're thankful that through this realignment, we have been assigned Cindy Bennett, Senior Clinical Specialist, who has worked with our Community on several occasions while she has performed our Mock Surveys. We look forward to continuing to work with Cindy, and we look forward to the expertise that we can gain from her involvement in our Community.

ASSISTED LIVING & MEMORY CARE REPORT

Assisted Living and Memory Care started the year by maintaining an average census above our budgeted census for the first time since we opened in November of 2023!



HUMAN RESOURCES REPORT

December 2024 Overview

Turnover

1.98% turnover YTD 2025. Compared to 2.23% through January 2024.

Overtime:

2,244.15 hrs of OT for January 2025. Compared to 1,043.85 hrs for January 2024. An increase of 1,200.3 hrs on the month and total YTD increase in overtime from last year by 1,200.3 hrs.

NOTE: OT was increased due to holiday pay for 4 days that fell in the same pay period. These holidays are paid at time and half.

Workers' Compensation

F&B employee – Bump to the head. This is an old claim that has recently resurfaced. Last report was no response from claimant's attorney and case was hopefully closing. We recently switched work comp carriers whom recently reached out for an update. Claimant requested settlement of \$25K. Work comp will negotiate settlement. Employee has not worked in over 2 years with WhiteStone. Will update as new information is available.

Maintenance employee – Knee injury. His attorney did recently request settlement of \$110K, however, the claim is denied. Injury was never reported until almost a

Monthly Turnover		
	2025	2024
Jan	1.98%	2.23%
Feb		3.40%
Mar		3.44%
Apr		3.86%
May		1.86%
Jun		3.61%
Jul		3.82%
Aug		4.30%
Sep		1.99%
Oct		7.09%
Nov		2.38%
Dec		3.07%
TOTAL	1.98%	41.06%

year later. Investigations by work comp has revealed multiple previous claims against the same knee.

EEOC and Legal Updates:

On May 17th, we received notice of another EEOC Charge filed by an environmental services employee, Robin Allen. The position statement has been submitted to the EEOC. We are waiting on their response.

Budgeted FTEs:

Total January FTEs: 225.09

2025 Budgeted FTEs: 232.3.

Variance: -7.21 FTEs (UNDER budget)

Over Budget: None

Recruiting:

January 2025

- 245 New Candidates
- 56 Scheduled interviews
- 25 offers with 23 hires

Year To Date

- 245 candidates processed
- 56 scheduled interviews
- 25 offers with 23 hires

Retention:

WhiteStone will be focusing on three key components in our retention efforts for 2025:

- Successful New Hire Department Onboarding, "It's all about the experience" and training
- Performance Management – Setting and Adhering to Expectations
- Communication – Consistent meaningful staff meetings; timely evaluations; staff check-ins

Job Openings Report

Immediate Openings: 02/05/2025

Job Title	# of Openings	New Candidate Pipeline	Attempting to Contact	Interviews Scheduled	Offers Pending
Med Aid 1st shift PT	1		5		
Nurse 1st shift PT	2	2	1		
CNA 1st shift FT	2	6		3	
CNA 2nd shift FT	3	6		3	
Nurse 2nd shift FT	1	2	1		
CNA 3rd shift FT	3	6		3	
CNA 3rd shift PT	1	6		3	
Nurse 3rd shift PT	2	2	1		
Nurse 3rd shift FT	1	2	1		
Payroll/Benefits coordinator	1		3		
MDS coordinator	1		2	1	

Total openings: 18

Total offers: 0

Opening after offers: 18

Interviews scheduled: 13

Ready for orientation: 10 new hires for 02/13/25

MARKETING & SALES REPORT

Monthly Marketing Report

January 2025

Current Occupancy: (211)	202	96%			
Sold Occupancy:	206	98%			
Available Units:	<u>Villa</u>	<u>Cottage</u>	<u>IL Apts</u>	<u>Res Apts</u>	
	0	0	0	5	
Explanation:	<u>Villa</u>	<u>Cottage</u>	<u>IL Apts</u>	<u>Res Apts</u>	
				<i>Benn 144</i>	<i>Benn 342</i>
				<i>Benn 146</i>	<i>Benn 343</i>
				<i>Benn 341</i>	
Sales (Jan)	1	<i>ILW 228</i>	Cancel:	0	
Move-In: (Jan)	2	<i>Benn 244, ILS 415</i>	Upcoming MI:	6J	
				701RL	
				701 FM	
Transfers:	0			ILW 228	
MO (Jan):					
Upcoming MO:	<u>Unit</u>	<u>reason</u>	<u>Est MO</u>		
	Benn 349	HLOC	2/4/2025		
	Lath 261	HLOC	2/17/2025		
	707 FM	HLOC	Feb		
Upcoming Events:	2/20/2025	Marketing Lunch & Learn			
	2/26/2025	Q1 Wait List Lunch			
Department Highlights:	Sales Team to attend LCS Sales Conf Feb 5-7				

PLANT OPERATIONS REPORT

Last Month's Activities

- *Monitor work order system for efficiency and department needs*
- *Thermal scan of campus electrical panels*
- *Still Working with Engineers on IL humidity issue's*
- *Continue to work with Brightview on existing work orders and problem areas*

Accomplishments for the Month

- *Completed scan of campus electrical panels*
- *Completed Pool inspection with health Dept.*

Plans for the Next Month

- *Estimate for additional Golf cart parking for wellness center*
- *Hire one 2nd shift part-time security guards*
- *Complete boiler installation for CWC*

Issues and Concerns

- *Continue to address work orders asap. We have had 1 vacant position come open in security. We are currently looking for 1 more team member.*

ENVIRONMENTAL SERVICES REPORT

Last Month's Activities

Conducted in-services with staff.

- *No fault attendance policy recap!! (Always)*
- *Staying State ready. Inclement Weather Policy.*
- *Wearing Gloves in the Corridors*
- *Safety*
- *Report too all Fire Drills*

Accomplishments for the Month are as follows

- *Hired 3 new staff members*

Plans for the next Month

- *Continuing Hiring PRN staff*
- *Kickoff of Employee Appreciation for Superbowl*
- *Work on completing work orders*
- *Getting ready for the board meeting & For State*

Issues and Concerns

- *Hiring proper staff for our community (Housekeeping & Custodian)*
- *Some staff have attendance issues.*

OUTREACH FOUNDATION: FRATERNAL FRIENDSHIP PROGRAM

January 2025 Overview Assistance:

- Outreach total of \$13,847.27
 - 7 long-term members
 - 1 short term member (Emergency)
- 20 WhiteStone residents received assistance
 - 16 in Independent Living
 - 3 in Assisted Living
 - 1 in Memory Care

New Referrals & Outreach:

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

If you know of a member who needs assistance, please contact:

Jenna Grant

Director of Fraternal Friendship

Email: jgrant@meshhome.org Phone: (336) 601-5593.

FINANCE REPORT

Medicaid – We still have 4 pending applications. We did have 1 write off due to a resident passing away and having to write off the private pay balance due from the application process.

Review of Private Pay AR in the HC over 90 days was done to analyze the amount of that balance as it relates to Medicaid applications. Of the over 90 delinquent AR 47.54% is from internal Medicaid applications (i.e. IL foundation residents that transitioned to the HC). there are 4 residents that make up this balance and 1 has an Unmet Medical already filed and 1 has a zero PML so all income except \$70 a month will be applied to her balance. The other 2 were reapplied again to Medicaid once additional documents were received. There are 3 external residents that make up 6.60% of the over 90 delinquent balance and 1 is still Medicaid Pending. We did have 1 write off due to the resident passing away and there are no assets at all.

Of the over 90 delinquent balance 54.14% is related to Medicaid residents and the timing of when their benefits were approved. We have 1 private pay resident with a balance of 85k that we will be able to collect on but will need to go thru the estate to do so but the assets are there for this resident. We have turned approximately 105k over to collections to work.

As previously reported an RFP was issued for the third-party Advisor over the 401k plan. Early January 2025 the Grand Lodge made a sole decision on behalf of the entire plan as to which Advisor to engage services with from the RFP. At this time, an RFP will need to be conducted for the record keeper (currently Empower). It is unclear if the RFP will be conducted by RPAS who did Advisor RFP or if the new Advisor chosen by the Grand Lodge will conduct the RFP. Being managed by Grand Lodge

WhiteStone has engaged CareFeed an LCS and CPS vendor to assist with billing options for residents to pay their bills online. This is like how a doctor's office or hospital invoice and provide options for online payments. The goal is to roll this out in January or February. Ongoing and is a top priority to kick off 2025 --- this will hit the March invoices when processed as we are awaiting Sage Age to update the website with the Pay Now button.

Year end 2024 filings such as audit, 990, cost report, and compilation for the disclosure statement are kicking off in February.

FOOD & BEVERAGE REPORT

Certified Dietary Manager

We've extended an offer to a candidate for this role in the Care and Wellness Center. She's currently working out a 30-day notice and will start with us sometime in March.

ServSafe

We are scheduling another ServSafe training session and test. We currently have a proctor on staff, and are planning to get all Managers certified, as well as all front-line staff their Food Handlers certification.

Valentine's Day

We are planning a nice Valentine's Day dinner for our Residents, complete with carved Prime Rib and Broiled Salmon.

Cost of Goods

January started the year off strong with food cost and overall labor cost well under budget.

Care and Wellness Audits

We've been busy conducting daily tray and kitchen audits in the CWC kitchen. This is helping us to prepare for our State Survey as well as ensuring quality and accuracy with our daily services.

COMMUNITY LIFE SERVICES REPORT

Independent Living Programming:

- *Total Number of Activities: 80*
- *Total Number of Sessions: 201*
- *Total Number of Cancellations: 1*
- *Total Participation: 3164*
- *Average Participation: 15.7 (~17 per activity)*
- *Participation Percentage: 96.3% (77/80 activities had participants).*
- *Total number of check-ins: 271*

Changes since December 2024:

- *Total Number of Activities decreased by 2 (2.6% increase)*
- *Total Number of Sessions increased by 5 (2.6% increase)*
- *Total Participation increased by 365 (13.0% increase)*
- *Average Participation increased by 1.4 (9.8 increase)*
 - *(Note: Average = Total Participation/Total Number of Sessions)*
- *Participation Percentage decreased by 7.8%*
- *Total Number of Check-Ins increased by 144 (34.7% decrease)*

Staffing Updates:

- *Stable.*

Other Items I have completed, or I am working on:

- *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/uniquet and in to Point Click Care as we get them (this is ongoing)*
- *Working on keeping email list updated for CWC families as well as a separate list for AL families.*
- *Chit Chat and Healthcare Highlights every month*
- *Host List in CWC*
- *Exploring Motivation Alliance Program and what it has to offer our residents. (Same system as we saw at Croasdaile Village when we visited)*
- *Audit of One Call Now Numbers and Emails to make sure they are correct*
- *Department Meetings for the year to be scheduled.*
- *Senior Games Preparation*
- *Focus on Exercise classes – new classes/offerings*
- *Focus on “state of the art” type activities for IL – something that makes us stand out from other communities.*
- *Increasing visibility with each level of care as much as I can*
- *Re-engage the fraternities and fraternal children’s home.*

CHAPLAIN & SPIRITUAL SERVICES REPORT

Worship Services: 4

Funerals: 1 (*assisted with Michael James*)

Pastoral Encounters:

- *CWC - 40+ (some with family present, lunch walk throughs occasionally)*
- *AL- 14+(as well as walk throughs at lunch occasionally to greet residents)*
- *IL- 23+ (as well as walk throughs at meals occasionally to greet residents)*
- *Employee - 2*

Weekly Bible studies/worship:

- *CWC – 4*
- *AL – 4*
- *IL – 2*

Support Groups: None, *both to start back in February.*

Meetings: *CWC daily report, “traffic” meeting, Spiritual Support Committee, Resident Council*

Miscellaneous: *attended IL coffees and other activities as able, removed Christmas décor, continued card ministry, prepared articles for newsletters, New Resident Orientation*

Working on the following for Feb: Butler memorial service planning/prep, planning support groups to start back in Feb, Sermon series planning

Long-term: Chapel improvements (heat, carpet, pew touchup), enrichment of spiritual support for all faiths – planning a small area for a meditation room open to all faiths

PTO: 1/1