



July 2024

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 JULY 2024

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> |
| July 8th | <i>Town Hall w/ Mark Lewis</i> |
| July 11th, 18th, & 31st | <i>New Hire & General Orientation</i> |
| July 19th | <i>Produce Delivery from Masonic 1st District</i> |
| July 22nd | <i>Opening Ceremonies of the Summer Olympics at WhiteStone</i> |
| July 23rd | <i>Chair Volleyball – Resident vs Staff.</i> |
| July 23rd | <i>Swop Shop</i> |
| July 24th | <i>York Rite Bodies Ice Cream Social for WhiteStone Residents</i> |
| July 25th | <i>Resident Council Meeting</i> |
| July 26th | <i>Ice Cream Social for Staff – sponsored by Residents</i> |
| July 26th | <i>Wine Down & Closing Ceremonies of the Summer Olympics – Marketing/CLS</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 Tuesday] Fellowship Hall</i> |
| Monthly: | <i>MESH Lodge #771 Meeting [2nd Saturday] Fellowship Hall</i> |
| July 12th | <i>OES Foundation Board Meeting</i> |
| July 16th | <i>NCMF Board Meeting</i> |
| July 19th | <i>Produce Delivery from Masonic 1st District</i> |
| July 24th | <i>York Rite Bodies Ice Cream Social for WhiteStone Residents</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> |
| Monthly: | <i>WhiteStone Resident Committee: Auxiliary [3rd Wednesday]</i> |
| Monthly: | <i>Resident Council Meeting [Last Thursday] Fellowship Hall</i> |
| As Needed: | <i>WhiteStone COVID Task Force</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) |
|--|--|
| July 9th – 11th | <i>Jon Back – LCS Clinical Specialist – Site Visit</i> |
| July 25th | <i>WhiteStone/LCS – Blueprint/Road to 95 Follow Up</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> |
| July 22 nd | <i>Opening Ceremonies for the Summer Olympics</i> |

WHITESTONE EMPLOYEE: RECOGNITION, RECRUITMENT, & RETAINMENT:

| DATE(S): | MEETING(S)/EVENT(S) |
|-----------------------|--|
| Bi-Weekly | <i>New Hire and General Orientation</i> |
| July 23 rd | <i>Chair Volleyball – Residents vs. Staff</i> |
| July 26 th | <i>Ice Cream Social for Staff – sponsored by Residents</i> |

WHITESTONE EMPLOYEE: JULY ANNIVERSARIES

| SERVICE DATE: | EMPLOYEE NAME: | DEPARTMENT | YEARS OF SERVICE: |
|---------------|---------------------------|------------------------------|-------------------|
| 7/6 | <i>Latisha Davis</i> | <i>Nursing</i> | <i>1 yr</i> |
| 7/6 | <i>McKayla Perry</i> | <i>Nursing</i> | <i>1 yr</i> |
| 7/8 | <i>Karla Stapleton</i> | <i>Health & Wellness</i> | <i>3 yrs</i> |
| 7/9 | <i>Austin Russell</i> | <i>Assisted Living</i> | <i>5 yrs</i> |
| 7/13 | <i>Princess Nyennetue</i> | <i>Nursing</i> | <i>1 yr</i> |
| 7/13 | <i>Robert Reese Sr.</i> | <i>EVS</i> | <i>1 yr</i> |
| 7/18 | <i>Amanda Cottrell</i> | <i>CLS</i> | <i>17 yrs</i> |
| 7/20 | <i>Catrina Cardwell</i> | <i>Nursing</i> | <i>1 yr</i> |
| 7/21 | <i>Timothy Bellamy</i> | <i>Security</i> | <i>2 yrs</i> |
| 7/21 | <i>Mandy Duncan</i> | <i>EVS</i> | <i>2 yrs</i> |
| 7/23 | <i>Allison LeTourneau</i> | <i>CLS</i> | <i>4 yrs</i> |
| 7/27 | <i>Brenda Anderson</i> | <i>Nursing</i> | <i>1 yr</i> |



KEY PERFORMANCE INDICATORS – JULY 2024

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

| | |
|------------------|---|
| YTD NOI | Actual of 168,573 on budget of (724,106), a positive variance of 872,599. |
| YTD IL Closings | Budget of 21 with actual closings of 46. |
| YTD Net Sales IL | Budget of 14 with actual net sales at 38. |
| IL MTD Occupancy | Average occupancy of 192.9 on budget of 173. |
| YTD REVPOR | REVPOR budget of 5,748 with actual 6,206 an 8.0% variance. |

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

| | |
|------------|--|
| YTD EXPPOR | EXPPOR YTD budget at 6,673 with actual 6,804, a (2.0%) variance. |
|------------|--|

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

| | |
|---------------------------|---|
| Memory Care MTD Occupancy | Averaged 6.39 on budget of 10. |
| AL MTD Occupancy | Averaged 14.77 occupied for the month on a budget of 22. |
| HC MTD Occupancy | Average occupancy for the month of 80.10 with budget of 82.29 |
| Days in AR | 30% of total AR 90 days outstanding or \$483,088. Benchmark is 15% negative variance of 241,695 |



COVID-19 TASKFORCE & UPDATE(S) – JULY 2024

We are once again seeing the rise of COVID-19 across the state of North Carolina. Our community experienced an uptick in COVID-19 infections. This included residents and staff in both the Care and Wellness Center and Independent Living. Per regulation, visitation to the CWC continued as usual, with that added safety precautions protocols of wearing a mask, social distancing, and hand sanitizing. We continued to test our staff and residents, according to CDC and CMS guidelines, throughout the month.

We are working with Neil Medical to schedule a vaccine clinic for our community. However, the new COVID-19 booster vaccine is not due to release until September. In the meantime, we will continue to monitor the impact of the virus on our campus and will update safety measures accordingly.



WHITESTONE LEADERSHIP TEAM: DIRECTORS REPORT

| DIRECTOR NAME | DEPARTMENT |
|-----------------------------|---|
| Mr. Mark Lewis, LNHA | Executive Director |
| Mr. Josh Hillegass, LNHA | Health Services Administrator |
| Dr. Ray Robinson | Assisted Living Manager |
| Mrs. Tracy Armwood, SPHR | Director, Human Resources |
| Ms. Marie Dunn | 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 Condy | Director, Clinical Services |

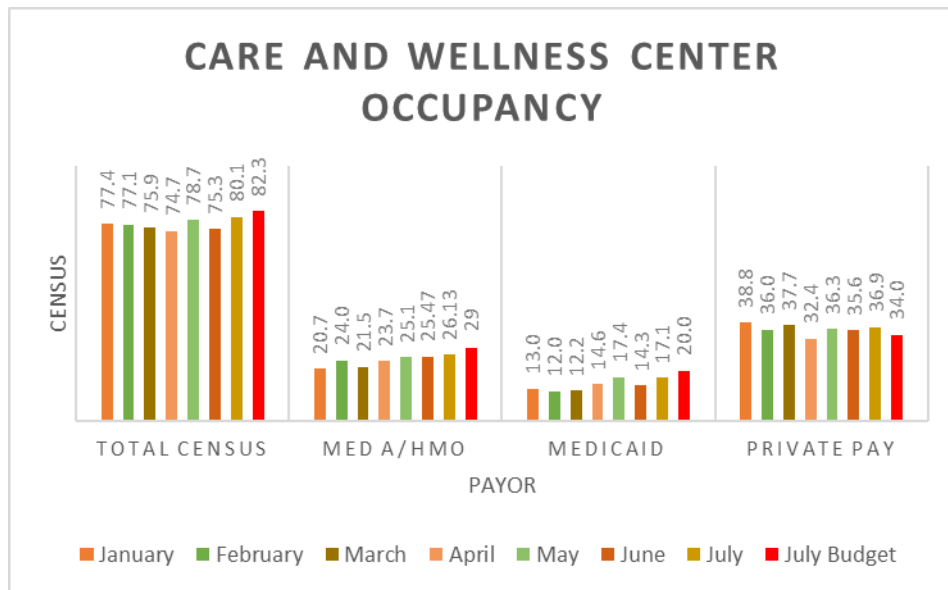
I. HEALTH CENTER ADMINISTRATION REPORT

July 2024 Overview

On July 25th, the Care and Wellness Center underwent an audit by Myers and Stauffer. This audit, which is conducted on behalf of North Carolina Medicaid, Division of Health Benefits, focuses on a Minimum Data Set (MDS) Validation Review. Our MDS is composed of all aspects of a Residents care during their time at the Care and Wellness Center to include their activities of daily living, nursing services provided, and several other factors. Ultimately, based upon our documentation in the MDS, we can set our reimbursement rate for that Resident to make the applicable rate for their needs. During the audit, the auditors are focused on validating the supporting documentation that we have within our Electronic Medical Record (EMR) to support the rates that we are assigning during the completion of our MDS. Our two items that were unsupported during their review related to the date of completion of two assessments that were completed by a prior Team Member. As of today, we have corrected these issues, and I do not foresee any further issues related to the timeliness of completion. I'm pleased to report that our audit went successfully with us falling below the threshold for unsupported documentation with those two items in consideration.

Census Updates

The Care and Wellness Center retains a strong census moving through the 2nd Quarter of the 2024 year. As you can see below, our census in July fell just shy of our budget of 82, but we maintained an overall occupancy rate of 93% for the Month. In addition to the strong occupancy rate, our Skilled Census (Medicare and Managed Care Products) continues to grow month-over-month, and I expect this trend to continue throughout the remainder of the year.



Clinical Updates

During the week of July 8th, we had our Clinical Specialist Review. Our Clinical Specialist, Jon Back, arrived at our community to provide his review as well as to provide education to our Clinical Leadership Team. As a result of Jon's visit, our team has implemented an ongoing plan of correction to address any identified areas of

opportunity. In addition to these plans of correction, our Nursing Leadership Team has taken on the task of revamping our Daily Clinical Meeting to be more comprehensive and inclusive of all needed agenda items to ensure follow through, accountability, and sound Resident care. Please find below the results of his visit.

| COMMUNITY | | Overall Score | | CLINICAL SPECIALIST | |
|--|--------------------------|----------------------|--------------------------|--|---------------|
| Whitestone | | 82% | | Jon Back, RN | |
| REVIEW COMPLETION DATE | | | | <input checked="" type="checkbox"/> Onsite Visit <input type="checkbox"/> Virtual Visit | |
| 07.11.24 | | | | Heartfelt Connection Certification <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO | |
| REVIEW COMPONENTS | IF 100% | Individual Component | No Revi | Budgeted Cer | Actual Census |
| | | | | 82 | 80 |
| Comments | | | | | |
| Resident Rights | <input type="checkbox"/> | 91% | <input type="checkbox"/> | | |
| Free from Abuse, Neglect and Exploitation | <input type="checkbox"/> | 100% | <input type="checkbox"/> | | |
| Quality of Life/Activities of Daily Living | <input type="checkbox"/> | 73% | <input type="checkbox"/> | | |
| Assessment & Comprehensive Care Plans | <input type="checkbox"/> | 82% | <input type="checkbox"/> | | |
| Life Enrichment and Heartfelt Connections | <input type="checkbox"/> | 100% | <input type="checkbox"/> | | |
| Social Services/Behavior Management | <input type="checkbox"/> | 55% | <input type="checkbox"/> | | |
| Bowel and Bladder Management | <input type="checkbox"/> | 73% | <input type="checkbox"/> | | |
| Event Management | <input type="checkbox"/> | 36% | <input type="checkbox"/> | | |
| Nutrition/Hydration Management & Dialysis | <input type="checkbox"/> | 91% | <input type="checkbox"/> | | |
| Pain Management | <input type="checkbox"/> | 91% | <input type="checkbox"/> | | |
| Skin and Wound Management | <input type="checkbox"/> | 91% | <input type="checkbox"/> | | |
| Discharge Planning | <input type="checkbox"/> | 91% | <input type="checkbox"/> | | |
| Daily Clinical Meeting | <input type="checkbox"/> | 82% | <input type="checkbox"/> | | |
| Weekly Risk Meeting | <input type="checkbox"/> | 91% | <input type="checkbox"/> | | |
| Physician and Nursing Services | <input type="checkbox"/> | 82% | <input type="checkbox"/> | | |
| Medication/Order Management | <input type="checkbox"/> | 91% | <input type="checkbox"/> | | |
| Food/Beverage and Dining Services | <input type="checkbox"/> | 82% | <input type="checkbox"/> | | |
| Infection Prevention and Control | <input type="checkbox"/> | 82% | <input type="checkbox"/> | | |
| Physical Environment | <input type="checkbox"/> | 82% | <input type="checkbox"/> | | |

We are once again seeing the rise of COVID-19 across the state of North Carolina. Many are referring to this as the “Summer Spike” which we have come accustomed to over the past years. Unfortunately, our community is dealing with the increase in COVID-19 cases as well. Currently, our Care and Wellness Center has been experiencing cases amongst both Staff and Residents, but I’m thankful to share that we have not seen any significant illness because of these cases. Our team will continue to follow state and local guidance surrounding infection control and prevention, as well as providing our Residents and Staff with opportunities for vaccination as they arise.

II. ASSISTED LIVING & MEMORY CARE REPORT

Last months overview

July was a record-setting month for Assisted Living and Memory Care. We were able to increase our community census to 24. This number is the highest that the community has had since its opening in December 2023. Thanks to the partnership between marketing, CWC, health navigation, and AL, we are

making immense movement toward our goals. This is the third month we hit the 90% goal required by the Department of Insurance (DOI). In addition to our admission goals, we promote a culture of family and togetherness among our residents and their loved ones.

The second floor is now open, and six residents are there. This is 50% of the floor capacity, a fantastic victory. The group has identified many potential residents who are appropriate for the services provided in the Rice Retreat. We currently have seven residents in Memory Care, and we have booked the eighth apartment to be filled in August. This move-in will render MC 2/3 complete. Activities and dietary staff are working to provide resident center care in their respective areas. Include family-style meals in memory care and individualized options for each resident.

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. Supervisor in charge (SIC) training has taken off, and the education has proven to be beneficial to all involved: residents, families, and staff. Our closing rate continues to be over 80% for both internal move-ins and through IL to AL move-ins.

We have been able to help celebrate our residents by hosting birthday parties and planning group outings, such as winery tours and trips to the science museum.

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 August as we aim to improve upon the 90% mark. There are census needs in both AL and MC.

- *Supervisor in Charge (SIC) education and protocol for documentation by auditing our policies.*
- *increasing our opportunities to share the AL/MC journey.*

Issues and Concerns

Four opportunities exist for the assisted living and memory care community. By constantly focusing on the following items, the team will experience success in accomplishing organizational goals. The four 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.*
- *Creating protocols to circumvent the growing pains of developing AL/MC*

III. HUMAN RESOURCES REPORT

July 2024 Overview

Turnover

22.21% turnover YTD 2024. Compared to 19.15% through July 2023.

Overtime:

1046.82 hrs of OT for July 2024. Compared to 870.03 hrs for July 2023. An increase of 176.79 hrs on the month and total YTD increase in overtime from last year by 1733.4 hrs.

Workers Compensation

Nurse injured on 7/8/24 with potential hip fracture has been returned back to work full duty with no lost time. She has a follow up appointment with ortho. So far all is well.

EEOC & Legal Updates

We are still waiting for a response related to the employee LC charge.

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

Budgeted FTEs

Total June FTEs: 217.86

Total Budgeted FTEs: 228.85

Variance: -11.02 [FTEs **UNDER** budget]

Over Budget FTEs for July

Servers – 0.50

Housekeepers: 1.99

Cooks – 1.13

Recruiting

July 2024

- 441 New Candidates
- 51 Scheduled interviews
- 25 offers with 21 hires.

YTD

- processed 3,295 candidates
- 452 scheduled interviews
- 189 offers with 150 hires

| MONTHLY TURNOVER | | |
|-------------------------|---------------|---------------|
| | 2024 | 2023 |
| Jan | 2.23% | 2.89% |
| Feb | 3.40% | 0.41% |
| Mar | 3.44% | 4.68% |
| Apr | 3.86% | 2.16% |
| May | 1.86% | 2.62% |
| Jun | 3.78% | 2.04% |
| Jul | 3.64% | 4.35% |
| Aug | | 5.77% |
| Sep | | 2.94% |
| Oct | | 3.62% |
| Nov | | 1.05% |
| Dec | | 2.11% |
| TOTAL | 22.21% | 34.64% |

Retention

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

- August 19th: National Potato Day – Employee Appreciation Potato Bar

Check the new Meet Our Team video posted on Facebook. We will be doing more in the way of videos for social media as well as Welcome videos from each department head to their new team member a couple of days before orientation.

WhiteStone now has TicTok Account! Our last post of the Employee Appreciation Ice Cream Bar received over 22,000 views and we are gaining followers. All Kudos to Meghane Langlois our new Recruiter

Recommendations and/or Other Information

As we enter budget season, we are conducting wage analysis of all positions to prepare for recommendation for the 2025 budget. We are happy to say our minimum at Whitestone is \$15.08/hr. We must continue to push our minimum to stay competitive in the market. We will need to make wage scale adjustments for the maintenance department for the 2025 budget year and continue to raise the minimum for CNAs to close to \$20/hr. Currently CNA minimum is \$17.14/hr.

Job Openings Report

Immediate Openings: 8/6/24

| Job Title | # of Openings | New Candidate Pipeline | Attempting to Contact | Interviews Scheduled | Offers Pending |
|------------------------------------|---------------|------------------------|-----------------------|----------------------|----------------|
| Charge Nurse - 2nd shift Parttime | 2 | | 7 | 3 | |
| Charge Nurse - 3rd shift Part Time | 1 | | 7 | | |
| CNA - 1st shift Part time | 2 | 4 | 14 | 6 | |
| CNA - 2nd shift Part Time | 1 | 4 | 14 | | |
| Nurse Supervisor 2nd shift | 1 | | | | |
| Nurse Supervisor 3rd shift | 1 | | | | |
| MDS - PT | 1 | | | | |
| Maintenance Tech | 1 | | | 1 | |
| Utility FT | 1 | 1 | 1 | 1 | |
| CLS Coordinator FT | 1 | 10 | 4 | 1 | |
| Senior Billing Specialist | 1 | 5 | 3 | 1 | |
| Transportation Driver | 1 | 5 | 1 | | |

Total openings: 14

Total offers: 0

Opening after offers: 14

Interviews scheduled: 13

Ready for orientation: 16 new hires for 8/15/24

IV. MARKETING & SALES REPORT

| Monthly Marketing Report | | | | | |
|---------------------------------|--|----------------------------------|---------------------|-----------------|---------|
| July 2024 | | | | | |
| Current Occupancy: (211) | 193 | 91% | | | |
| Sold Occupancy: | 203 | 96% | | | |
| Available Units: | <u>Villa</u> | <u>Cottage</u> | <u>IL Apts</u> | <u>Res Apts</u> | |
| | 0 | 1 | 1 | 6 | |
| Explanation: | <u>Villa</u> | <u>Cottage</u> | <u>IL Apts</u> | <u>Res Apts</u> | |
| | | 6-J | 334 | 146 | 341 |
| | | | | 241 Benn | 343 |
| | | | | 244 Benn | 349 |
| Sales: | 2 | 232, 144 | Cancel: | 0 | |
| Move-In: (July) | 4 | 3 SRC, 110, 411 144 | Upcoming MI: | Cott 2-A | 419 |
| | | | | 232 | 907 FMD |
| | | | | 315 | 311 |
| Transfers: | 0 | | | Benn 145 | Lin 309 |
| | | | | 415 | 705 FMD |
| MO (July): | 4 | 349, 144, 6-J, 343 | | | |
| Upcoming MO: | <u>Unit</u> | <u>reason</u> | <u>Est MO</u> | | |
| | IL 103 | MO | 8/16/2024 | | |
| Upcoming Events: | 8/13/2024 | Prospect Event: Around the World | | | |
| | 8/21/2024 | New Resident Orientation | | | |
| | 8/28/2024 | Diamond Dining | | | |
| Department Highlights: | Marie Dunn, Director of Sales and Marketing promoted to Regional position within LCS, last day will be 8/20. | | | | |
| | Debi Bryant will assume the role of Director of Sales and Marketing on August 21st. | | | | |
| | Roadmap to 95% in IL | | | | |
| | Campus Wide Road to 95% Campaign | | | | |

V. PLANT OPERATIONS / ENVIRONMENTAL SERVICES REPORT

PLANT OPERATIONS

Last Month's Activities

- *Worked with Blum on punch list for new IL and AL buildings*
- *Worked with HVAC contractor to address noise issues with IL apartments*
- *Monitor work order system for efficiency and department needs*

Accomplishments for the Month

- *Completed annual fire door inspection in CWC*
- *Completed Quarterly sprinkler inspection*
- *Completed assessment and repair for IL and AL*
- *Completed Annual fire extinguisher checks for cottages and villa's*

Plans for the Next Month

- *Complete rotunda project*
- *Finalize replacement generator purchase for CWC*
- *Complete Sand filter service by Ecoland*
- *Get quotes for Golf carts for property and purchase*

Issues and Concerns

- *We are working to hire another maintenance technician but have had little success finding someone which will affect work order numbers.*

ENVIROMENTAL SERVICES

Last Month's Activities

- *No fault attendance policy recap!! (Always)*
- *Posting of schedules*
- *Clocking in and out no more than five minutes before the shift and after the shift.*
- *Breaktimes.*
- *The use of Sani Wipes (Must wear gloves)*
- *Bloodborne Pathogens training.*
- *Employee Incidents reports must be reported immediately.*

Accomplishments for the Month are as follows:

- *Completed several work orders with new carpet machine.*
- *Completed department orientation with new staff members.*
- *Discussed the following policies and procedures: Attendance and clocking in and out procedures along with miss punch policies.*
- *Visited Croasdale Community.*
- *Proper use of staff wearing the proper PPE.*

- *One new custodian being hired, and One custodian transferred to our department.*

Plans for the next Month

- *Continue discussing Attendance issues and staffing.*
- *Bloodborne pathogens training.*
- *Miss punch policy.*
- *Customer service with residents and coworkers.*

Issues and Concerns

- *Training all staff in safety & reporting injuries.*
- *Eight staff members have attendance issues.*
- *Reduce Turnover of staff.*

VI. OUTREACH PROGRAM: THE FOUNDATION

July 2023 Overview

Assistance:

- *Outreach total of \$9,185.54*
 - *7 long term members*
 - *0 short term member (Emergency)*
- *15 WhiteStone residents received assistance*
 - *11 in Independent Living*
 - *3 in Assisted Living*
 - *1 in Memory Care*

New Referrals & Outreach:

- *4 potential referrals are being processed by our Outreach Coordinator*
 - *(3) are for scholarships (Move-In Assistance or Current Resident)*
 - *(0) 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
Phone: (336) 601-5593.

VII. FINANCE REPORT

Medicaid

We have 9 pending total applications. We have reached out to a law office and a company that specializes in filing Medicaid and are hitting roadblocks. We continue to try to resolve this, and I am working with a social worker from Guilford County DSS for some guidance as we go. We will file paper requests for the ones that we are having so many issues within the month of August at her recommendation given the trouble we are having.

Accounts Receivables

- *Over 90 is 29% of total AR*
- *Medicaid is 26% of total AR of which the pending applications are 72% of the total AR for Medicaid*
- *HC Private is 23% of total AR and over that 46% is over 90 days*
- *HC Private as 3 accounts delinquent that are to note – 1 is related to PML that we are working with the family and hope to have resolved within 30 days, 1 is a resident with no family or POA that we are drafting a payment each month and have a plan in place to pay the balance off should he pass, 1 is receiving a 30 day notice of discharge if no payment is collected.*
- *In ALMC a Delinquent Account balance of 31k was collected in July*

Continued

The annual 990 tax return filing should have everything submitted by the end of month. The 401k audit Tracy is trying to wrap this up; there is a reconciliation question that she is hopefully addressing upon returning from vacation. We do have a compliance testing issue with the plan and have met with the group, Barbara Ruby – legal counsel and Empower to discuss corrective action for this failure. The failure is with the Children's Home and LuAnne will work with their board to address the matter and decide on the corrective plan which will need to be done by 10/15.

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. Lance from Empower did respond and I will be following up with him to see if he is open to having a meeting to discuss the letter and his follow-up. I did reach out to Barbara Ruby, and she was not surprised by the response as it is in line with our document and agreement but I'm going to see if Lance is open to working on this if not it will advance to the next stage. Update – I was finally able to get a meeting scheduled with Empower representatives to discuss this matter in July given scheduling conflicts it took some time to find a date and time that worked. I will update after the meeting. UPDATE: the meeting was held and information turned in to Empower as of today there has been no update but I have reached out. During the meeting I was asked to present the lost earnings amounts that were paid as there is potential room for recoupment there. I have communicated with Barbara Ruby regarding this as previously reported above and noting this was a long shot for us to try, we are still working to see if there is anything that can be done.

Residents have requested an online payment portal for monthly fees/invoices. Working with our bank (PNC) and LCS to find a solution for this request as I feel it will be very beneficial and helpful in collecting payments but also allowing residents more payment options. This is still in the works, and I need to regroup to see which

meets our needs best. I have spoken to another community that uses the LCS recommend vendor to get their opinions on how the transition went and how it is going thus fair.

It is budget season. Forecasting has been completed and there are some items to update and then review department head requests. The biggest expense focus will be on staffing as it relates to FTEs and wages.

VIII. FOOD & BEVERAGE REPORT

Online Ordering

Online ordering for A La Carte items through FullCount is now active and operational. Residents are increasing the number of items ordered online.

IL A La Carte Menu Ticket Times

With the increase in online pre-orders, we've seen reduced ticket times. We continue to promote this to our Residents.

Health-Conscious Menu Items

We've continued to have a positive response to our healthier menu items. This trend is expected to continue and will influence our future menus.

Summer Olympics

We hosted a successful Wine Down with country specific themed food to accompany our Olympic Celebration. Selections included goat cheese tarts, patatas bravas, Maryland crab cakes and raspberry brie.

IX. COMMUNITY LIFE SERVICES REPORT

Independent Living Programming:

- Total Number of Activities: 102
- Total Number of Sessions: 208
- Total Number of Cancellations: 4
- Total Participation: 3145
- Average Participation: 15.1 (~15)
- Participation Percentage: 84.3%
 - 86/102 activities had participants.
- Total number of check-ins: 313

Changes since June:

- Total Number of Activities increased by 12 (13.3% Increase)
- Total Number of Sessions increased by 4 (2.0% Increase)
- Total Participation increased by 11 (0.4% Decrease)
- Average Participation decreased by 0.3 (1.9% Decrease)
 - (Note: Average = Total Participation/Total Number of Sessions)
- Participation Percentage decreased by 4.6%
- Total Number of Check-Ins decreased by 48 (13.3% Decrease)
- Sessions of Intergenerational Activities (chess, karaoke, scrapbooking): 4

Staffing Updates:

Claire Johnson turned in her notice and her last day is August 16th. However, she is coming in to help with a Luau in Assisted Living on August 23rd and she is working her weekend August 24th and 25th. So technically her last day is August 25th. Our former intern Jillian Tolley applied, and I am hoping to interview her soon. The entire team wants her on our team. She is very well liked and was a wonderful intern and we would love to have her.

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 have more admits to 2nd floor)

Other Items:

- *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. Would hate it for there to be an emergency and someone didn't get a one call now.*
- *Working on Uniquet changes that came from my Uniquet meeting with Bob Kelly and Beverly Cato last week.*
- *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/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.*
- *Lifelong Learning Opportunities – exploring this for our Blueprint Meeting-a work in progress and trying to make contacts. Problem I am running in to – a lot of the teachers are on break for the summer. Still working on it though!*
- *Chit Chat and Healthcare Highlights every month*
- *Host List in CWC*

X. CHAPLAIN & SPIRITUAL SERVICES REPORT

Services

- *3 regular Chapel services (Chaplain Pat Thames spoke for the week, when I was on PTO)*

Funerals officiated

- *0 funerals*

Pastoral Encounters

- *CWC – 25+ (some with family present)*
- *AL – 6+ (as well as walk through(s) at lunch to greet residents)*
- *IL – 20+ (grief support with family as well)*
- *Employee – 3 (phone calls, etc.)*

Weekly Bible studies/worship

- *CWC – 2*
- *AL – 3*
- *IL – 1*

Support Groups

- *RISE x2*

Meetings

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

Miscellaneous

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

Working on the following

- *planning a small area for a meditation room open to all faiths*
- *continued support group planning (grief workshop and special speakers)*
- *encouraging volunteer opportunities*
- *enrichment of spiritual support for all faiths*
- *planning events with Jewish residents*
- *planning Health & Wellness Fair*

PTO Taken: *June 17th to 24th*