



JULY 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 JULY 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>
July 11th	<i>All Staff Happy Hour</i>
July 14th	<i>1st District Produce Donation</i>
July 22nd & 23rd	<i>All Staff Training: Person Centered Care by Sharon Maguire, SVP at LCS</i>
July 25th	<i>Leadership Serve at Wine Down</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>

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>

DATE(S):	MEETING(S)/EVENT(S)
Monthly:	<i>WhiteStone Resident Committee: Campus Care Alliance [3rd Tuesday]</i>
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>
Monthly:	<i>WhiteStone Retreat: A Caregiver Respite Program [3rd Tuesday]</i>
As Needed:	<i>WhiteStone COVID Task Force</i>
July 9th	<i>York Rite Bodies Annual Ice Cream Social</i>
July 21st	<i>Plastics/Film Recycling Presentation by Cathy Ingram</i>
July 31st	<i>Vial Information Day at WS for IL Residents by H&W Depart.</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 22nd & 23rd	<i>All Staff Training: Person Centered Care by Sharon Maguire, SVP at LCS</i>
July 24th	<i>Marie Dunn Site Visit</i>

WHITESTONE EXPANSION: PROJECT(S) & REPORTING

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

WHITESTONE TECHNOLOGY INFRASTRUCTURE: PROJECT(S) & REPORTING

DATE(S):	MEETING(S)/EVENT(S)
July 16th – 25th	<i>IL Dining Room Duct Repair</i>

WHITESTONE NEW RESIDENT: PROSPECTING EVENT(S):

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

WHITESTONE EMPLOYEE: RECOGNITION, RECRUITMENT, & RETAINMENT:

DATE(S):	MEETING(S)/EVENT(S)
Bi-Weekly	<i>New Hire and General Orientation</i>
July 2nd	<i>Remembering Randy Gant</i>
July 11th	<i>All Staff Happy Hour</i>
July 22nd & 23rd	<i>All Staff Training: Person Centered Care by Sharon Maguire, SVP at LCS</i>
July 28th	<i>Italian Ice Cart hosted by Always Best Care</i>
July 29th	<i>Ice Cream Truck hosted by Authora Care, Triad Cremation, Health Team Advantage</i>

WHITESTONE EMPLOYEE: JULY ANNIVERSARIES

EMPLOYEE NAME:	YEARS OF SERVICE:	DEPARTMENT:	SERVICE DATE:
<i>Latisha Davis</i>	<i>2 yrs</i>	<i>Nursing</i>	<i>7/6</i>
<i>Karla Stapleton</i>	<i>4 yrs</i>	<i>Health & Wellness</i>	<i>7/8</i>
<i>Austin Russell</i>	<i>6 yrs</i>	<i>Assisted Living</i>	<i>7/9</i>
<i>Jessica Jean Pierre Rejouis</i>	<i>1 y</i>	<i>Nursing</i>	<i>7/11</i>
<i>Delali Som-Pimpong</i>	<i>1 yr</i>	<i>Food & Beverage</i>	<i>7/11</i>
<i>Mandy Cottrell</i>	<i>18 yrs</i>	<i>CLS</i>	<i>7/18</i>
<i>A'Niyia Dancy</i>	<i>1 yr</i>	<i>Food & Beverage</i>	<i>7/18</i>
<i>Patricia Willoughby</i>	<i>1 yr</i>	<i>Nursing</i>	<i>7/18</i>
<i>Shanon Losardo</i>	<i>1 yr</i>	<i>Nursing</i>	<i>7/48</i>
<i>Mandy Duncan</i>	<i>3 yrs</i>	<i>EVS</i>	<i>7/21</i>
<i>Allison LeTourneau</i>	<i>5 yrs</i>	<i>CLS</i>	<i>7/23</i>
<i>Brenda Anderson</i>	<i>2 yrs</i>	<i>Nursing</i>	<i>7/27</i>
<i>Geraldine Hargrove</i>	<i>1 yr</i>	<i>EVS</i>	<i>7/29</i>
<i>Veronica Ingram</i>	<i>1 yr</i>	<i>Food & Beverage</i>	<i>7/31</i>
<i>Annette Longhi</i>	<i>1 yr</i>	<i>Nursing</i>	<i>7/31</i>

KEY PERFORMANCE INDICATORS – JULY 2025

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

YTD NOI	Actual of 4,510,586 on budget of 476,959, a positive variance of 4,033,626.
YTD IL Closings	Budget of 14 with actual closings of 20.
Memory Care MTD Occupancy	Averaged 9.81 on budget of 8.5.
IL MTD Occupancy	Averaged 204.52 for the month on a budget of 197
YTD REVPOR	REVPOR budget of 6,430 with actual 6,485 a +.9% variance.
YTD EXPPOR	EXPPOR budget of 6,715 with actual 6,303 a +6.1% variance.

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

YTD Net Sales IL	Budget of 21 with actual net sales at 20.
AL MTD Occupancy	Averaged 21.16 occupied for the month on a budget of 21.5.
HC MTD Occupancy	Average occupancy for the month of 77.07 with budget of 77.5

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

Days in AR	Days in AR average of 16.5 versus target of 18. 46% of total AR 90 days outstanding versus benchmark of 15%.
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COVID-19 TASKFORCE & UPDATE(S) – JULY 2025

For the month of July we had 3 residents and 2 staff test positive for COVID-19 cases in the Care and Wellness Center. Necessary precautions were put into place and services were modified to those residents and staff.

WHITESTONE LEADERSHIP TEAM: DIRECTORS REPORT

DIRECTOR NAME	DEPARTMENT
Mr. Mark Lewis, LNHA	Executive Director
Mr. Josh Hillegass, LNHA	Health Services Administrator
Mrs. Ginger Cottrell	Assisted Living Manager
Mrs. Tracy Armwood, SPHR	Director, Human Resources
Mrs. Debi Bryant	Director, Sales & Marketing
Mr. Joel King	Director, Plant Operations
Mr. Leonard Miller	Director, Environmental Services
Mrs. Jenna Grant	Director, Fraternal Friendship Program
Ms. Nikki Stafford	Director, Finance
Mrs. Betsey Johnson	Director, Culinary Services
Mrs. Gina Prevost, LRT/CTRS	Director, Community Life Services
Mrs. Misty McAden	Director, Spiritual Services & Chaplain
Ms. Archana Patel	Executive Assistant
Mrs. Rachel Seibert	Director, Clinical Services

HEALTH CENTER REPORT

July 2025 Overview

Our Team in the Health Center has grown significantly over the past month to include a few key roles that will majorly impact our Residents, Families, and Team Members. Our Team would like to introduce you to the following new Team Members (From left to right):

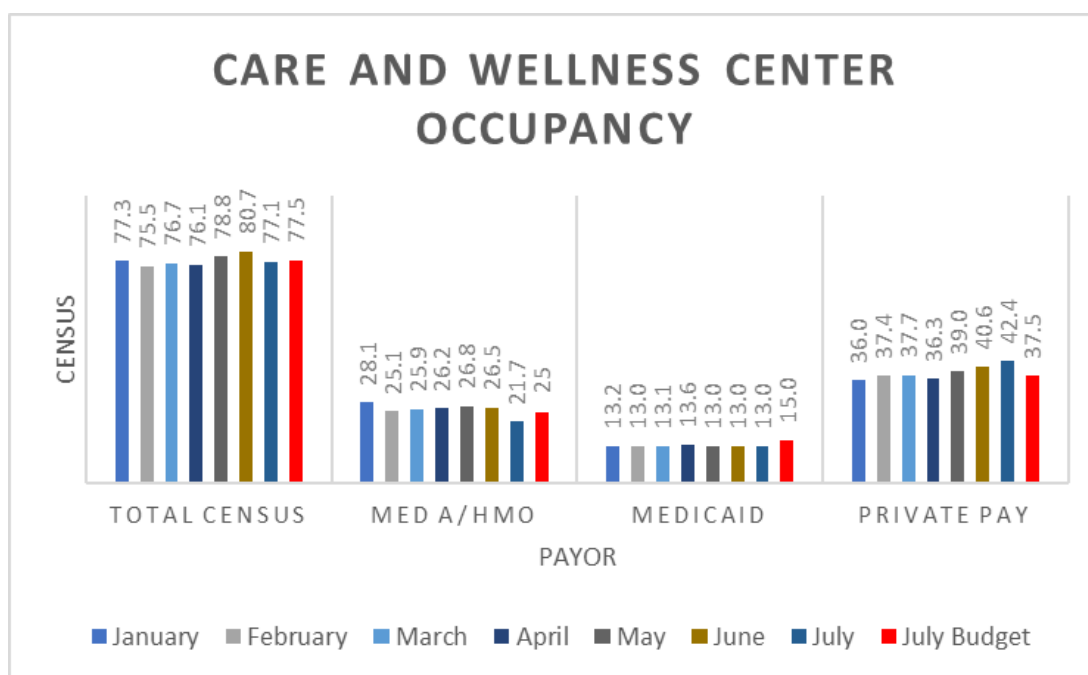
- Rachel Seibert, Director of Nursing
- Amanda Montgomery, Assistant Director of Nursing
- Ginger Cottrell, Assisted Living Manager



Additional information and biographies about each of these Team Members can be found in the Clinical Update of this report.

Census Updates

The Care and Wellness Center maintained at/near budget for this month in both total census and skilled census. Due to a few Resident transitions, we did see a lower overall census that we've seen in previous months, but our team is working to backfill those beds to improve our census in the coming months.



Clinical Updates

We've welcomed several new members to our Leadership Team in the Health Center, and I wanted to take a moment to introduce each of them. Rachel, Amanda, and Ginger all come to our community with a wealth of experience, and we look forward to them getting to know our Residents, Families, and Team Members. Please find brief biographies for all of them below:

Rachel Seibert, Director of Nursing

We are pleased to welcome Rachel Seibert to Whitestone as our new Director of Nursing. Originally from Iowa, Rachel brings nearly three decades of nursing experience and a deep commitment to compassionate, person-centered care.

Rachel began her nursing career as a Licensed Practical Nurse and, while raising a family, pursued further education to earn her Registered Nurse license and later her Bachelor of Science in Nursing. Her dedication to lifelong learning and professional growth reflects her passion for both nursing and education.

Over the course of her career, Rachel has served in a variety of healthcare settings. She spent 17 years in a hospital system in Iowa before transitioning into hospice care. Most recently, she held leadership roles in assisted living and long-term care, where she discovered her true calling. Rachel is deeply committed to supporting residents and their families, and she considers it a privilege to serve in this capacity.

Rachel and her husband, Al, recently relocated to North Carolina, where Al will be serving as Assistant Coach and General Manager for the Men's Basketball team at Elon University. Rachel is excited to begin this new chapter and is grateful to have found a community as welcoming and mission-driven as Whitestone.

Outside of her professional life, Rachel is a proud mother to three adult children—Noah, Mike, and Katie—and enjoys a close relationship with her younger sister, Liz, and her five-year-old niece, Lila.

Rachel looks forward to building meaningful relationships with residents, families, and team members, and is honored to be part of the Whitestone family.

Amanda Montgomery, Assistant Director of Nursing

Hello everyone. I would like to take a moment and introduce myself. I'm Amanda Montgomery, BSN, RN the new Assistant Director of Nursing here at Whitestone. My background includes 10+ years of Long-Term Care experience in Nursing Leadership with roles such as Nurse Supervisor, RN Manager, Infection Preventionist, Staff Development Coordinator and Assistant Director of Nursing. With an extensive background in creating high performing teams by way of empowerment through education, attention to detail, rapport building skills, coupled with my resourceful problem-solving abilities it is my goal to provide exceptional care to all residents within the Whitestone Community.

On a personal note, I am a mom to four amazing kids. My oldest son is 20 years old and works full time in the Automotive Industry, boy/girl twins who are 18 and just graduated from High School both of which will attend college this Fall and my youngest son, is 9 years old, and keeps me busy playing Football, Basketball and Travel Baseball. What most may not know about me is I am a HUGE football fan. Some may count down the days until it is officially fall for cooler weather, but I count down the days until it's Sunday Night Football.

I am beyond excited to be joining such a great team here at Whitestone and look forward to meeting everyone!

Ginger Cottrell, Assisted Living Manager

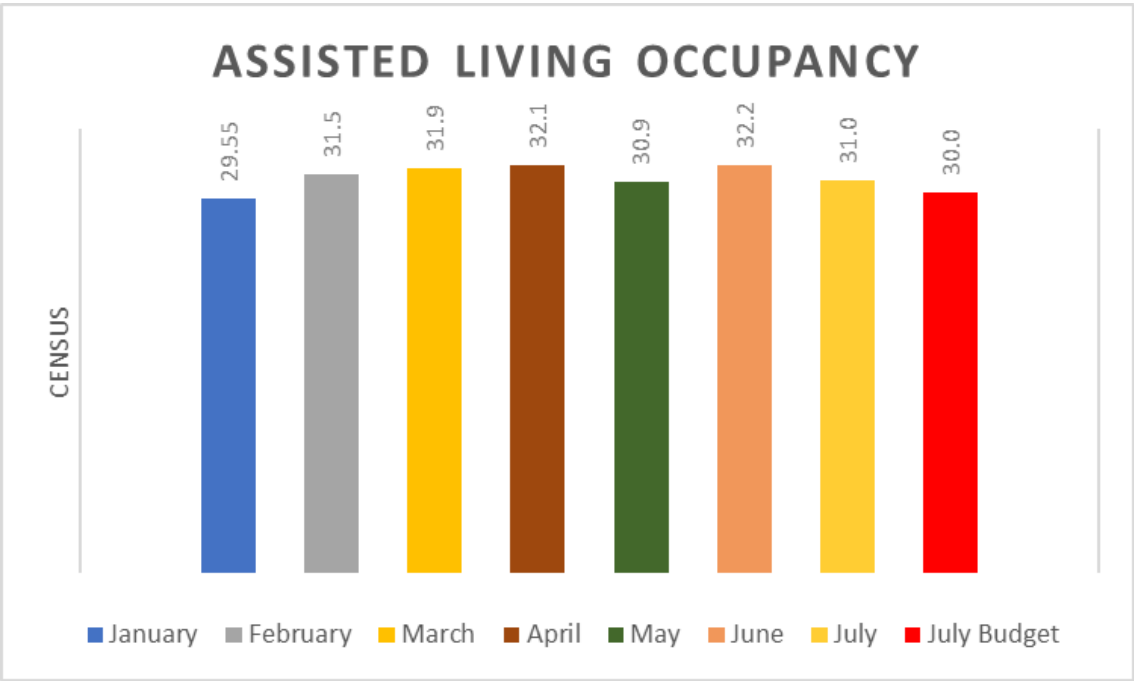
Ginger Cottrell serves as the Assisted Living Manager, bringing a compassionate spirit and strong leadership to our community. With a deep commitment to resident care and well-being, Ginger ensures that daily operations run smoothly and that residents receive the highest quality of support. Her educational journey includes a Practical Nursing Diploma from Forsyth Technical Community College, a Bachelor of Science in Business Administration from the University of North Carolina at Greensboro, and a Master of Business Administration (MBA) from Western Governors University. This unique combination of clinical and business training allows Ginger to lead with both empathy and efficiency.

With years of experience in senior living and healthcare, Ginger has built a reputation for fostering a warm, respectful environment where both residents and team members thrive. Her hands-on approach, clear communication, and dedication to excellence have made her a valuable addition to our leadership team.

Outside of work, Ginger enjoys spending time with her dog, mentoring student athletes at Ragsdale High School, and visiting the lake.

ASSISTED LIVING & MEMORY CARE REPORT

Assisted Living and Memory Care maintained strong census continuing through July. Our Team continues to garner interest from Residents who are looking to move into Assisted Living or Memory Care, and we continue to have a strong census.



HUMAN RESOURCES REPORT

July 2025 Overview

Turnover: 22.31% turnover YTD 2025. Compared to 22.21% through July 2024.

Increase of .10%

Overtime: 1695.68 hrs of OT for July 2025. Compared to 1046.82 hrs for July 2024. An increase of 648.86 hrs on the month and total YTD increase in overtime from last year by 5,113.24 hrs of OT.

Workers' Compensation: *Maintenance Tech. – UPDATE: A hearing with the NC Industrial Commission was held August 8th. There was still no resolution. Our counsel is awaiting more medical documentation from 2019. I feel we were in a pretty good position during the hearing. As a reminder this was a Knee injury. The claim is still denied. Injury was never reported until almost a year later. Investigations by work comp has revealed multiple previous claims against the same knee.*

EEOC and Legal Updates: *None*

Budgeted FTEs:

Total July FTEs – 225.23

2025 Budgeted FTEs – 232.3.

Variance: -7.07 FTEs UNDER budget.

Over Budget:

AL CNAs – 3.87

CWC CNAs – 3.43

Housekeepers – 2.79

Recruiting:

- **July 2025**
 - 710 New Candidates
 - 62 Scheduled interviews
 - 19 offers with 14 hires.
- **YTD HR has processed**
 - 2,741 candidates
 - 311 interviews scheduled interviews
 - 152 offers with 132 hires.

We are gearing up for the fall job fair season. We are already signed up HPU, WSSU, NC A&T, GTCC and we have our next onsite job fair scheduled for September 4th!

Also, currently we have some very enthusiastic GTCC and ECPI Clinical students who have already shown interest in joining our team!!

Monthly Turnover		
	2025	2024
Jan	1.98%	2.23%
Feb	3.28%	3.40%
Mar	1.69%	3.44%
Apr	3.77%	3.86%
May	3.77%	1.86%
Jun	3.91%	3.61%
Jul	3.92%	3.82%
Aug		4.30%
Sep		1.99%
Oct		7.09%
Nov		2.38%
Dec		3.07%
TOTAL	22.31%	41.06%

Retention:

The HR department continues to engage with new hires within the first week of employment to gauge their experience and any potential concerns we may need to address. Keeping these on ongoing touch points for the first 6 months of employment we hope will reduce turnover, therefore retaining staff.

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*
 - *Update: A member of the department will personally call each new team member to make introductions PRIOR to orientation. They will also be creating a flyer or communication in advance of orientation that will be posted to welcome new hires to their department but also to inform current staff they are coming. Each department will create a department welcome gift and packet specifically from the department. A mandatory one week check will be required for all new hires by a member of management that will be a questionnaire to be filled out, signed and turned into HR.*
- *Performance Management – Setting and Adhering to Expectations*
 - *Update: We are currently discussing performance expectation as a leadership team to develop updated tools, train and develop a plan to adequately manage performance.*
- *Communication – Consistent meaningful staff meetings; timely evaluations; staff check-in*
 - *Update: All departments are to at a minimum hold monthly staff meetings, create avenues for continued communication to their teams, and schedule ongoing new hire check ins.*

Job Openings Report

Immediate Openings: 8/5/25

Job Title	# of Openings	New Candidate Pipeline	Attempting to Contact	Interviews Scheduled	Offers Pending
PT/FT MDS Coordinator	1				
RN Weekend Supervisor 7a-7p	1				
CWC NURSE 1st shift - PT	2		6	1	
CWC NURSE 2nd shift - FT	2		6	1	
CWC NURSE 3rd shift - FT & PT	2		6		
CWC CNA 1st shift - FT	1		9	1	
CWC CNA 2nd shift - FT	7		9	1	
CWC CNA 3rd shift -FT & PT	2		9	1	
Custodian FT 2nd shift	1		6		
Maintenance Technician	1		2	2	
PT Server	2		4	1	
Transportation Driver	1		2		
People and Brand Strategist HR	1	15			

Total openings: 24 Total Offers: 00 Opening after offers: 24 Interviews Scheduled: 8

Ready for Orientation: 14 new hires ready for orientation on 8/14/25

MARKETING & SALES REPORT

Monthly Marketing Report

July- 2025

Current Occupancy: (210)	204	97%			
Sold Occupancy:	209	100%			
Available Units:	<u>Villa</u>	<u>Cottage</u>	<u>IL Apts</u>	<u>Res Apts</u>	
	0	0	0	1	
Explanation:	<u>Villa</u>	<u>Cottage</u>	<u>IL Apts</u>	<u>Res Apts</u>	
				<i>Interim staff</i>	
Sales (July)	3		Cancel:	0	
Move-In: (July)	6		Upcoming MI:	1005 FMD	ILS 414
				ILW 424	ILW 434
				1 FD	
Transfers:	0				
MO (July):	3				
	ILW 434	HLOC			
	ILW 430	HLOC			
	Benn 144	HLOC			
Upcoming MO:	<u>Unit</u>	<u>reason</u>	<u>Est MO</u>		
	Benn 146	HLOC	8/15/2025		
	ILW 327	HLOC	8/18/2025		
Dept Highlights:		Debi & Monica attended Triad Retirement Living Assoc. meeting			
		Sales & Marketing Team hit a milestone - Only one unit left!			
		Bennette Building getting a light refresh			
Upcoming Events:	8/20/2025	New Resident Orientation			
	8/21/2025	Marketing Event - Resident Panel			

PLANT OPERATIONS REPORT

Last Month's Activities

- *Continue to work with Brightview on existing work orders and problem areas*
- *Dining Room Moisture issue*
- *Continue to monitor work order numbers for the community*

Accomplishments for the Month

- *Continue to pressure wash curbs and walkways*
- *Completed Duct Insulation Project for Main Dining room*

Plans for the Next Month

- *Continue Pressure washing curbs and courtyard*
- *Completing Walk in cooler and freezer project*

Issues and Concerns

- *Continue to address work orders asap.*
- *1 full-time position vacancy for Security*
- *1 full-time position vacancy for Maintenance*

ENVIRONMENTAL SERVICES REPORT

Last Month's Activities:

- *Completed Duty sheet/workflow for CWC and Assisted Living*
- *Fixed floor scrubbing machine and placed in service for CWC floors*
- *Identified new chemical vendor and set date for installation*
- *Received quote to completely repair all flooring equipment/ordered parts.*

Accomplishments for the Month are as follows:

- *Installed new housekeeping/laundry Chemical*
- *Conducted Training for the new Chemical and explained how they work and where to use each Chemical*
- *Fully Extracted entire dining room after duct work project*
- *Trained Custodians on carpet cleaning methods*
- *Placed the Karcher Armada extractor into service*
- *Placed IMop into service*

Plans for the next month

- *Review and update job descriptions for the lead housekeeper*
- *Create a project list to get floor care on a routine*
- *Strip and wax back CWC hallway*
- *Hold Customer Service training with staff*

Issues and concerns

- *Correcting hard surfaces from chemical buildup*

OUTREACH FOUNDATION: FRATERNAL FRIENDSHIP PROGRAM

July 2025 Overview Assistance:

- *Outreach total of \$8,507.32*
 - *6 long-term members*
 - *0 short term member (Emergency)*
- *17 WhiteStone residents received assistance*
 - *13 in Independent Living*
 - *3 in Assisted Living*
 - *1 in Memory Care*

Potential Referrals:

- *(3) are for scholarships (Move-In Assistance or Current Resident)*
- *(0) are for Long Term Assistance*
- *(0) for Short-Term / Emergency Assistance*

Activity this month:

- *Scheduled upcoming FFP presentations at multiple lodges*
- *Completed 1 Annual Review*
- *Ordered groceries for members*
- *Took members to doctor appointments*
- *Updated Actuarial Table*
- *Paid bills for outreach members*
- *Attended Masonic Luncheon*
- *Met with potential applicant, her mother lived here at Whitestone for many years*
- *MCSA Outreach call*
- *Met OES Foundation Board members and shared FFP Brochures with them*
- *Gave birthday, anniversary, and sympathy cards to members*
- *Connected WhiteStone prospect with Ohio Masonic Outreach Services*

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

Financials are continuing to hold strong, and the community is outperforming budget as it relates to NOI. We are under budget as it relates to net entrance fees.

The community is forecasted to be compliant with debt covenants at 12/31/2025 based on forecasting for the remainder of the year. Moving into 2026 it will be crucial to perform well financially and ensure that unit closings are maximizing units with favorable entrance fees.

There are currently 0 Medicaid Pending Applications and 2 Pending Unmet Medical Agreements. As previously discussed and reported at board meetings the bulk of our over 90 AR is related to Private Pay balance in the HC due to Medicaid Pending applications and the length of time to get them approved. When you remove this factor our AR aging is rather strong and we are collecting payment timely for the most part. This situation with the Medicaid and Private Pay residents will be on the books for some time as we chip away each month at the delinquent balances.

We are using a collections company however we are not impressed by the work they have done. A review of this arrangement throughout the remainder of the year will be done to see if there are better options. While a legal firm has been used in the past unfortunately finding a local firm to engage for this purpose has posed challenges in the past hence how the community landed with the company they are using but the option of a law firm will still be evaluated.

In July post the finance committee meeting the following items were approved:

- *Move forward with Gay Terrace project – the budget was 185k but the actual cost will be closer to 367k*
- *Approval to engage with Network Unlimited out of Winston Salem to install fiber optic in the “Village” part of the community where the villa homes and cottages are located*
- *Transfer 1.5M to the Unrestricted Investment account with the NCMF*

The ERC filing from January 2024 has been received in full at approximately 2.8M in addition to interest of 400k. The 1.5M transfer referenced above is related to the ERC funds received.

Budget season is well underway. The goal is to present to Jacob Elliott with LCS early September. A couple of key items that are a large focal point with the 2026 budget:

- *Control Capex to a manageable level that fits with cash flows*
- *Entrance fees and and increase*
- *Budgeting and maintaining a sustainable monthly service fee increase for residents – 2025 had a 5% increase the goal for 2026 is to be at 4.50%. While getting back to a 3% increase is very unlikely a 4% increase each year may be possible. The SPF is still a topic of discussion, however given the situation it presented for 2025 it's being evaluated a couple of ways to get the community to where the fee needs to be over the course of a few years*
- *Expense control for non-wage items – with 2025 being 100% open across the community this area should not fluctuate much for 2026. Areas that we may see increase is utilities, food costs and building and grounds maint and repair but any increase should be manageable*
- *Investing in staff through wage rates and employee benefits to be competitive and create an environment that meets the needs of staff.*

CULINARY SERVICES REPORT

July 2025 Food & Beverage Management Report

- Eric Baker to Executive Chef – Eric remains committed to enhancing the dining experience at WhiteStone. He and his team continue working diligently to stabilize and elevate culinary operations. As part of this effort, Chef Eric is revising the main dining a 'la carte menu to reflect seasonal flavors, with a fresh focus on fall inspired dishes.

Culinary Engagement Initiatives

- WhiteStone's first-ever Chef's Table event will take place on 8/22/25 @ 5:00. Within 48 hours of sending out email announcements and printed memos, the event reached full capacity.

COMMUNITY LIFE SERVICES REPORT

Independent Living Programming:

- *Total Number of Activities: 77*
- *Total Number of Sessions: 206*
- *Total Number of Cancellations: 4*
- *Total Participation: 2793*
- *Average Participation: 13.6 (~14 per activity)*
- *Participation Percentage: 88.3% (68/77 Activities had Participants)*
- *Total Number of Check-Ins: 247*

Changes since June 2025:

- *Total Number of Activities decreased by 12 (increased by 13.5%)*
- *Total Number of Sessions increased by 4 (increased by 2.0%)*
- *Total Participation increased by 632 (increased by 29.2%)*
- *Average Participation increased by 3.2 (27.1% increase)*
- *(Note: Average = Total Participation/Total Number of Sessions)*
- *Participation Percentage decreased by 1.8%*
- *Total Number of Check-Ins increased by 32 (14.9% increase)*

Staffing Updates:

Stable. Sarah Ramirez started with us on May 12th and has fit right in and is doing awesome!

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)*
- *Focus on “state of the art” type activities for IL – something that makes us stand out from other communities.*

- 2 things of note:
 - Cardio Drumming (Drums Alive) Started in April on the IL Calendar-has proven to be an exciting new offering on our fitness calendar. It has grown from twice a month now to every Tuesday!
 - Started WhiteStone Retreat, A Caregiver Respite Program for IL Residents caregivers who are spouses and to begin getting them used to assisted living staff. This started on April 22nd in the Group Fitness Room from 1pm-3pm. This program will hopefully continue to grow with resident word of mouth over the next few months.
- Increasing visibility with each level of care as much as I can
- Re-engage the fraternities and fraternal children's home.
- Collins Healthcare Courses to maintain my Licensure and Certification – CEUs.
- Upped our number of speakers on different topics here every month.

CHAPLAIN & SPIRITUAL SERVICES REPORT

Worship Services – 4 services

Funerals

- 1 Reflection/Grief support meeting for staff and residents after employee death
- attended 1 viewing (Ernestine Beal)
- spoke with 3 residents/families pre-planning final arrangements

Pastoral Encounters

- CWC -40+ (some with family present, lunch walk throughs occasionally)
- AL-7+(as well as walk throughs occasionally to greet residents)
- IL-25+ (as well as walk throughs at meals occasionally to greet residents)
- Employee – 3 (grief support)

Weekly Bible studies/worship

- CWC – 5
- AL – 5
- IL – 3

Support Groups:

- RISE – 1x
- HOPEFUL – 1x

Meetings: CWC daily report, Collaborative Care Team meeting, Spiritual Support Committee, Auxiliary Committee, Resident Council, Employee required training

Miscellaneous: New Resident orientation, attended IL coffees and other activities as able, continued card ministry, prepared articles for newsletters, prepared for mission trip to Honduras

Working on the following for August: Presentation after mission trip, support group planning, Bible Studies planning, host women's coffee

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