

## June 2024 M.E.S.H. Monthly Report: Board of Directors

White Stone 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 JUNE 2024**

#### WHITESTONE COMMUNITY VISIBILITY – LEADERSHIP:

| DATE(S):              | MEETING(S)/EVENT(S)   |
|-----------------------|---|
| Weekly:               | Women's Coffee – Fellowship Hall 9am-10:30am, Wednesdays    |
| Weekly:               | Men's Coffee – Fellowship Hall 9am-10:30am, Fridays         |
| Weekly:               | Wine Down – Fellowship Hall 3:30pm-5pm, Fridays             |
| Monthly:              | Masonic Luncheon [1 <sup>st</sup> Tuesday] Main Dining Room |
| Monthly               | Resident Council Meeting [Last Thursday] Fellowship Hall    |
| June 4 <sup>th</sup>  | Masonic Luncheon  |
| June 19 <sup>th</sup> | New Resident Orientation and Lunch                          |
| June 20 <sup>th</sup> | New Hire & General Orientation                              |
| June 27 <sup>th</sup> | Resident Council Meeting                                    |
| June 28 <sup>th</sup> | Welcome Reception (HR - Meghane Langlois & Leigh Love)      |

#### WHITESTONE FRATERNAL VISIBILTY

| DATE(S):             | MEETING(S)/EVENT(S)   |
|----------------------|---|
| Monthly:             | Masonic Luncheon [1 <sup>st</sup> Tuesday] Main Dining Room         |
| Monthly:             | MESH Chapter #379 Meeting [1 <sup>st</sup> Tuesday] Fellowship Hall |
| Monthly:             | MESH Lodge #771 Meeting [2 <sup>nd</sup> Saturday] Fellowship Hall  |
| June 4 <sup>th</sup> | Masonic Luncheon  |

#### WHITESTONE RESIDENTS: COMMITTEES, SERVICES & SUPPORT

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

Weekly:Women's Coffee - Fellowship Hall 9am-10:30am, WednesdaysWeekly:Men's Coffee - Fellowship Hall 9am-10:30am, FridaysWeekly:Caregiver Support Group - Woodbury Game Room 1p-2p, ThursdaysWeekly:Worship Service – Streamed on Channel 1390 & Chapel 10am-11am, SundaysMonthly:WhiteStone Resident Committee: Marketing [1<sup>st</sup> Wednesday]

| DATE(S):   | MEETING(S)/EVENT(S)   |
|------------|---|
| Monthly:   | WhiteStone Resident Committee: Spiritual [1 <sup>st</sup> Wednesday]          |
| Monthly:   | WhiteStone Resident Committee: Activities [2 <sup>nd</sup> Thursday]          |
| Monthly:   | WhiteStone Resident Committee: Food & Beverage [2 <sup>nd</sup> Thursday]     |
| Monthly:   | WhiteStone Resident Committee: Buildings & Grounds [2 <sup>nd</sup> Monday]   |
| Monthly:   | WhiteStone Resident Committee: Campus Care Alliance [3 <sup>rd</sup> Tuesday] |
| Monthly:   | WhiteStone Resident Committee: Auxiliary [3 <sup>rd</sup> Wednesday]          |
| Monthly:   | Resident Council Meeting [Last Thursday] Fellowship Hall                      |
| As Needed: | WhiteStone COVID Task Force   |

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

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

#### LIFECARE SERVICES [LCS]: SERVICES & SUPPORT

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

June 18<sup>th</sup> – 19<sup>th</sup> Rosanne Lamb – LCS RHRD Site Visit

June 25<sup>th</sup> to 27<sup>th</sup> Site Visit by Theresa Lehman, Food and Beverage Specialist

**June 28<sup>th</sup>** *LCS* & *WhiteStone Blueprint/Road to 95 Follow up call* 

#### 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:** New Resident Orientation & Lunch [3<sup>rd</sup> Wednesday]

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

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

Bi-Weekly New Hire and General Orientation

June 7<sup>th</sup> National Donut Day

June 17<sup>th</sup> – 21<sup>st</sup> CNA Week

June 19<sup>th</sup> Juneteenth

**June 28<sup>th</sup>** Welcome Reception (HR - Meghane Langlois & Leigh Love)

#### WHITESTONE EMPLOYEE: MAY ANNIVERSARIES

| SERVICE DATE: | EMPLOYEE NAME:          | DEPARTMENT             | YEARS OF SERVICE: |
|---------------|-------------------------|------------------------|-------------------|
| 6/4           | Tony Freeman            | Security               | 10 yrs            |
| 6/8           | Crystal Condy           | Nursing                | 1 yr              |
| 6/8           | Cynthia Covington       | Environmental Services | 1 yr              |
| 6/9           | Geoyia Ragsdale-Polk    | Food & Beverage        | 2 yrs             |
| 6/9           | Naisha Graham           | Food & Beverage        | 2 yrs             |
| 6/9           | Vanessa Ramirez-Alvarez | Food & Beverage        | 2 yrs             |
| 6/9           | Vendetta Rivers         | Nursing                | 2 yrs             |
| 6/12          | Geraldine Hargrove      | Environmental Servies  | 1 yr              |
| 6/12          | Jasmine Galbreath       | Nursing                | 6 yrs             |
| 6/15          | Alnisa Greens           | Nursing                | 1 yr              |
| 6/15          | Delvon Allen            | Food & Beverage        | 1 yr              |
| 6/15          | Denver Whatley          | Food & Beverage        | 4 yrs             |
| 6/22          | Abiezer Rivas           | Plant Operations       | 1 yr              |
| 6/22          | Erica Estrada           | Nursing                | 1 yr              |
| 6/22          | Floricel Wistehuff      | Nursing                | 1 yr              |
| 6/23          | Travis Craver           | Security               | 2 yrs             |
| 6/24          | Shaqan White            | Food & Beverage        | 11 yrs            |
| 6/26          | Tracy Armwood           | Human Resources        | 27 yrs            |
| 6/28          | Quintura Wilhite        | Health & Wellness      | 8 yrs             |



## **KEY PERFORMANCE INDICATORS – JUNE 2024**

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

| YTD NOI          | Actual of 167,435 on budget of (649,308), a positive variance of 816,743. |
|------------------|---|
| YTD IL Closings  | Budget of 18 with actual closings of 42.                                  |
| YTD Net Sales IL | Budget of 12 with actual net sales at 36.                                 |
| IL MTD Occupancy | Average occupancy of 193 on budget of 173.                                |
| YTD REVPOR       | REVPOR budget of 5,723 with actual 6,221 an 8.7%                          |
|                  | variance.   |

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

| YTD EXPPOR | EXPPOR YTD budget at 6,669 with actual 6,875, a |
|------------|---|
|            | (3.1%) variance.                                |

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

| Memory Care MTD Occupancy | Averaged 5.33 on budget of 9.50                   |
|---------------------------|---|
| AL MTD Occupancy          | Averaged 12.57 occupied for the month on a budget |
|                           | of 22.  |
| HC MTD Occupancy          | Average occupancy for the month of 75.14 with     |
|                           | budget of 80.29                                   |
| Days in AR                | 23% of total AR 90 days outstanding or \$387,966. |
|                           | Benchmark is 15% negative variance of 173,268     |

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

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



## 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               | Interim 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

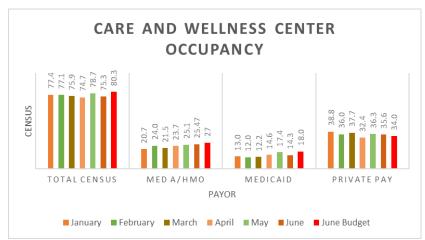
#### June 2024 Overview:

Our team had the chance to celebrate our C.N.A.s during the month of June. We're thankful each day for the care that they provide for our Residents, Families, and to each other. Look at some of the photos our team captured during our week of celebration!

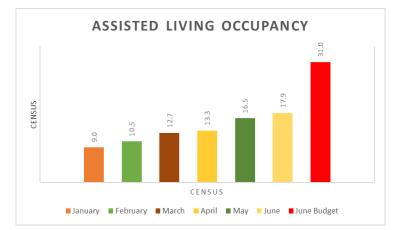


#### **Census Updates:**

The Care and Wellness Center census remains strong. While we saw a slight downturn in total census, we continue to grow and maintain a strong skilled census (Medicare and Managed Care). Our team continues to identify areas of opportunity to grow our clinical services to allow us to serve a greater population, along with expanding our referral sources. We look forward to continuing this through the second half of the year.



Assisted Living occupancy continues to grow month over month, and with the leadership of the team there, we're really beginning to pick up steam. Our Assisted Living Manager, Ray Robinson, has been pivotal in outreach, connecting, and marketing our services to our Residents, Families, and Staff. We look forward to this level of care coming fully on line as the year progresses.



#### **Clinical Updates:**

Our Clinical Team has been working diligently on education over the past month, including education to our WhiteStone Community. Our Director of Clinical Services, Crystal Condy, has been working hand in hand with our Staff Development Coordinator, Kishera Reid, onboarding, developing, and furthering the clinical experience of our WhiteStone Staff. In addition, the Clinical Team has been educating other members of our Staff such as Food and Beverage and even our Campus Care Alliance Committee on first aid and CPR. Our Clinical Team plans to continue to expand our training to other Departments and Residents as our year continues.

#### **II. ASSISTED LIVING & MEMORY CARE REPORT**

#### Last months overview

June was filled with many new opportunities for Assisted Living and Memory Care/ We were able to move in seven new neighbors to our community. Seven have already moved in and the eighth will move in in July. This is a new record high!!! Thanks to the partnership between marketing, CWC, health navigation and AL we are making immense movement toward our goals. This is the second month that we hit the 90% goal required by the Department of Insurance (DOI). In addition to our admission goals, we work to promote a culture of family and togetherness among our residents and their loved ones.

The second floor is now open and has nearly 50% capacity, which is an amazing victory. The group has identified many potential residents who are appropriate for the services provided in the Rice Retreat. We are currently above 50% in MC as we have booked the seventh apartment to be filled in July. Activities and dietary staff are working to provide resident center care in their respective areas. To 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, staff. We broke our own record for signing and closing rates with 8 residents signed in the month of June and 7 move ins.

We have been able to help in celebrating our staff members including the donation of a 50' television that was raffled off during National CAN Week. As we grow, we want to make more investments in the lives of our staff members. Creating lasting change for the AL and MC community at WhiteStone.

#### 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 four admissions in July. 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**

There are four 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 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**

#### **MAY 2024 OVERVIEW**

#### Turnover

18.56% turnover YTD 2024. Compared to 14.8% through June 2023.

#### Overtime

1253.11 hrs of OT for June 2024. Compared to 1503.37 hrs for June 2023. An decrease of -250.26 hrs on the month and total YTD increase in overtime from last year by 1556.61 hrs.

#### **Workers Compensation**

The F&B work comp claims as been closed due to the claim being denied and no response from attorney over the past few months.

We do have a new injury, 7/8/24 that has resulted in a potential hip fracture. LPN tripped over a power cord causing her to fall on her left hip. A CT Scan is being scheduled to confirm positive fracture. If fracture, so far recommendation is PT.

#### **EEOC & Legal Updates**

We are still waiting on a response related to the former charge.

On May 17th, we received notice of another EEOC Charge filed by an environmental services employee. They were released from employment after attempting to be placed on administrative leave from aggressive behavior towards two other employees when she would not cooperate and walked out. The position has been submitted to the EEOC. We will be waiting on their response.

| 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              |        | 4.35%  |  |  |
| Aug              |        | 5.77%  |  |  |
| Sep              |        | 2.94%  |  |  |
| Oct              |        | 3.62%  |  |  |
| Nov              |        | 1.05%  |  |  |
| Dec              |        | 2.11%  |  |  |
| TOTAL            | 18.56% | 34.64% |  |  |

#### **Budgeted FTEs**

Total June FTEs: 214.83 Total Budgeted FTEs: 228.85 Variance: -14.05 [FTEs **UNDER** budget]

#### **Over Budget FTEs for June**

Servers – 1.76 Housekeepers: 01.49 Cooks – 3.53 CNAs (CWC) – 6.19 but AL/MC is under by -5.80. (hrs are supposed to be reallocated to accurate recording of hrs in correct department. Not sure this is happening.)

#### Recruiting

June 2024

- 492 New Candidates
- 54 Scheduled interviews
- 31 offers with 25 hires.

#### YTD

- processed 2,963 candidates
- 393 scheduled interviews
- 163 offers with 130 hires

#### Retention

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

- July 11<sup>th</sup> PNC Financial Class
- July 23<sup>rd</sup> Swop Shop
- July 26<sup>th</sup> Employee Appreciation Ice Cream Bar

#### **Recommendations and/or Other Information**

We have new recruiter, Meghane Langlois. She has been in her new role for two weeks and is doing a fabulous job. We are excited to welcome her to the team. We also have another new addition, Leigh Love, HR Generalist. Leigh comes with 17 years of HR experience and has been in a previous director role. With PR being in the HR department as well as growing demands on the department the additional support is needed. This will also allow us to segregate duties more evenly and provide more timely response to staff needs.

#### Job Openings Report:

| Reported on: 6/5/24                |                |                         |                       |                       |                |
|------------------------------------|----------------|-------------------------|-----------------------|-----------------------|----------------|
| IMMEDIATE OPENINGS                 |                |                         |                       |                       |                |
| Job Title                          | # of Openings  | New Candidate Pipeline  | Attempting to Contact | Interviews Scheduled  | Offers Pending |
| Charge Nurse - 1st shift Full time | 3              | 2                       | 20                    | 9                     |                |
| Charge Nurse - 1st shift Part time | 2              | 2                       | 20                    | 9                     |                |
| Charge Nurse - 2nd shift Fulltime  | 0              | 2                       | 20                    | 9                     | 1              |
| Charge Nurse - 2nd shift Part time | 3              | 2                       | 20                    | 9                     |                |
| Charge Nurse - 3rd shift Fulltime  | 3              | 2                       | 20                    | 9                     |                |
| Charge Nurse - 3rd shift Part time | 1              | 2                       | 20                    | 9                     |                |
| CNA - 1st shift Fulltime           | 1              | 60                      | 25                    | 8                     |                |
| CNA - 1st shift Part time          | 2              | 60                      | 25                    | 8                     |                |
| CNA - 2nd shift Fulltime           | 2              | 60                      | 25                    | 8                     |                |
| CNA - 2nd shift Part time          | 1              | 60                      | 25                    | 8                     |                |
| CNA - 3rd shift Part Time          | 0              | 60                      | 25                    | 8                     |                |
| MDS - PT                           | 1              | 1                       | 1                     |                       |                |
| RN Every W/E Supervisor 7p-7a FT   | 1              | 1                       | 1                     |                       |                |
| Fitness/CLS Coordinator            | 1              |                         |                       |                       |                |
| Maintenance                        | 1              |                         |                       |                       |                |
| Utility - Fulltime                 | 1              | 27                      | 8                     | 2                     |                |
| Lead Server - Fulltime             | 1              | 0                       |                       |                       |                |
| Dietary Aide                       | 1              | 2                       | 10                    |                       |                |
| Bistro Cook                        | 1              | 0                       |                       |                       |                |
|                                    |                |                         |                       |                       |                |
| total openings:                    | 26             |                         |                       | Total Offers:         | 1              |
|                                    |                |                         |                       | Interviews Scheduled: | 19             |
|                                    | Openings after | Offers:                 | 25                    |                       |                |
| Ready for Orientation:             | Already 17 new | s hires for the 6/20/24 |                       |                       |                |

## **IV. MARKETING & SALES REPORT**

|                          | IVI         | onthly Marketi       | ng keport             |                 |         |
|--------------------------|-------------|----------------------|-----------------------|-----------------|---------|
|                          |             | June 202             | 24                    |                 |         |
| Current Occupancy: (211) | 193         | 91%                  |                       |                 |         |
| Sold Occupancy:          | 205         | 97%                  |                       |                 |         |
| Avalable Units:          | Villa       | <u>Cottage</u>       | IL Apts               | Res Apts        |         |
|                          | 0           | 0                    | 2                     | 4               |         |
| Explaination:            | Villa       | <u>Cottage</u>       | IL Apts               | Res Apts        |         |
|                          | <u>vina</u> | conage               | 232                   | <u>146</u>      |         |
|                          |             |                      | 334                   | 241 Benn        |         |
|                          |             |                      |                       | 244 Benn        |         |
|                          |             |                      |                       | 341             |         |
| Sales:                   | 7           | 311, 534, 309, 705   | Cancel:               | 1               | 534     |
|                          |             | 144, 343, 110        |                       | -               |         |
| Move-In: (June)          | 5           | Been 346, 6-D 144    | Upcoming MI:          | 3 SRC           | 419     |
|                          |             | 343, 534             |                       | 411             | 907 FMD |
|                          |             |                      |                       | 315             | 311     |
| Transfers:               |             |                      |                       | Benn 145        | Lin 309 |
|                          |             |                      |                       | 415             | 705 FMD |
|                          |             |                      |                       | Cott 2-A        |         |
| MO (June):               | 8           | 144, 309, 705 FMD, 3 | 311, 146, 343, 232, 3 | 334             |         |
| Upcoming MO:             | Unit        | reason               | Est MO                |                 |         |
|                          | Benn 144    | HLOC                 | 7/20/2024             |                 |         |
|                          | Benn 343    | HLOC                 | 7/27/2024             |                 |         |
|                          | Benn 349    | HLOC                 | JULY                  |                 |         |
| Upcoming Events:         | Campus -    | Olympics! The mkt to | eam will be hosting   | the closing cer | remony  |
|                          |             | wine down + awards   |                       |                 |         |
| Department Highlights:   | Roadmap to  |                      |                       |                 |         |
|                          | Campus Wie  | de Road to 95%       |                       |                 |         |

## V. PLANT OPERATIONS / ENVIRONMENTAL SERVICES REPORT

#### **PLANT OPERATIONS**

Activities for the month: Mr. Joel King has stepped into the Interim Director of Plant Operations with the departure of Rick Berkimer.

#### **ENVIROMENTAL SERVICES**

#### Last Month's Activities:

- No fault attendance policy recap!! (Always)
- Checked CWC housekeeping carts for the check off list books and make sure they are using it daily.
- Met with certain staff members to discuss policy, attendance issues and clocking in and out properly.
- Small celebration for Father's Day.

#### 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.

#### Plans for the next Month:

- Continue discussing Attendance issues and staffing.
- Bloodborne pathogens training.
- Continue search for proper uniforms.
- Miss punch policy

#### **Issues and Concerns:**

- Training all staff in safety & reporting injuries.
- Fire Drills what to do!
- Several staff members still have attendance issues.
- *Reduce Turnover of staff, as well as training on customer service.*

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

#### June 2023 OVERVIEW

#### Assistance:

- Outreach total of \$8,666.92
  - 7 long term members
  - 0 short term member (Emergency)
- 14 WhiteStone residents received assistance
  - 11 in Independent Living
  - 2 in Assisted Living
  - o 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: <u>igrant@meshhome.org</u> Phone: (336) 601-5593.

#### **VII. FINANCE REPORT**

**Medicaid** – we have 4 pending's that are being refiled. Really trying to work with everyone to make sure that we are filing correctly. Part of the issue are those residents that have family or community Medicaid and trying to convert those. With Deseree on board now she is stepping in to assist with the application filing and FL2 uploads. We may need to complete Unmet Medical Needs contracts on some of them which we have done before and was the guidance of the elder law group.

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 you after the meeting.

Planning a mid-year financial update with the department leaders.

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.

### **VIII. FOOD & BEVERAGE REPORT**

**Grove Menu Platform** - We are reconnecting with Grove to see if their menu platform could be a good fit for us. This would assist us with standardized recipes and production planning and help to increase our consistency and make our forecasting more accurate.

**IL A La Carte Menu** - Our revised A La Cart Menu has been well received. Residents have appreciated the additional vegetarian and health-conscious selections.

**IL Menu Nutritional Information** - We've included additional nutritional information on our IL daily menu denotating Vegetarian, Heart Healthy, Low Sodium and Gluten Free selections. This is helping our residents to make informed choices.

**F&B Resource Team Member Visit** - We had a two-day visit from Theresa Lehman, who provided input on scheduling, pick-ups/deliveries, dining room occupancy and reservations, buffet menu planning and Bistro operations. She had plenty of ideas and suggestions we are working through to see what we can implement for some positive results.

## IX. COMMUNITY LIFE SERVICES REPORT

#### Independent Living Programming:

- Total Number of Activities: 90
- Total Number of Sessions: 204
- Total Number of Cancellations: 4
- Total Participation: 3134
- Average Participation: 15.4 (~15)
- Participation Percentage: 88.9%
  - 80/90 activities had participants.
- Total number of check-ins: 361

#### Changes since May:

- Total Number of Activities decreased by 2 (2.2% Decrease)
- Total Number of Sessions increased by 7 (3.6% Increase)
- Total Participation decreased by 156 (4.7% Decrease)
- Average Participation decreased by 1.3 (7.8% Decrease)
  - (Note: Average = Total Participation/Total Number of Sessions)
- Participation Percentage decreased by 5.7%
- Total Number of Check-Ins increased by 16 (4.4% Increase)
- 5 Sessions of Intergenerational Activities (Chess with Students, Intergenerational Scrapbooks)
- Total Resident Volunteer Hours: 120.25 = 5 days

#### 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 2nd Floor)

#### **Other Items:**

- Summer Olympics at WhiteStone July 22<sup>nd</sup>-26<sup>th</sup>
- 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)
- 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

- 5 regular Chapel services
- Pens for Father's Day given out in Chapel and Dining room

#### Funerals officiated

• 2 Funeral – Ms. Brundage & Ms. P. Cates (graveside)

#### Pastoral Encounters

- CWC 49+ (some with family present)
- *AL* 17+ (some with family present)
- *IL* 24+ (grief support with family as well)
- Employee 3 (phone calls, etc.)

#### Weekly Bible studies/worship

- *CWC* 4
- *AL* 4
- *IL* 4

#### Support Groups

- RISE x2
- HOPEFUL x1

#### 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
- encouraging volunteer opportunities
- enrichment of spiritual support for all faiths
- planning events with Jewish residents

#### On hold

• planning another panel for "difficult conversations"

\*Upcoming Out of Office: - July 17<sup>th</sup> to July 24<sup>th</sup> (substitute for July 21<sup>st</sup> is Pat Thames)