

AS OF: 9/30/23

Unit #	Type	Resident Name	Resid.	Occup.	2nd Person	Avail.	Sold/Reserved	Total Units	Move in Date
<b>BENNETTE</b>									
140	Apt - Kitchenette	Out of Inventory	0	0	0	0	0	0	
142	Apt - Kitchenette	Teague, JoAnn	1	1	0	0	0	1	
144	Apt - Kitchenette		0	0	0	1	0	1	
145	Apt - Kitchen	Almy, Aurora	1	1	0	0	0	1	
146	Studio		0	0	0	1	0	1	
148	Studio	Out of Inventory - Exp. Closed	0	0	0	0	0	0	
149	Apt - Kitchenette	Ridings, Judy	1	1	0	0	0	1	
241	Apt - Kitchenette	Larry Shephard	1	1	0	0	0	1	
244	Apt Plus - Kitchen	Oettel, Joe & Pauline	2	1	1	0	0	1	
245	Apt - Kitchenette	White, Stephen	1	1	0	0	0	1	6/1/2023
248	Apt Plus - Kitchen	Hall, Ray	1	1	0	0	0	1	
249	Apt - Kitchenette	Kelly, Dwight	1	1	0	0	0	1	
251	Studio	Out of Inventory	0	0	0	0	0	0	
252	Studio	Out of Inventory	0	0	0	0	0	0	
253	Apt - Kitchenette	Jones, Jill	1	1	0	0	0	1	
341	Apt - Kitchenette	Smith, Mary	1	1	0	0	0	1	
342	Apt - Kitchenette	Corbett, Ellen	1	1	0	0	0	1	7/1/2023
343	Apt - Kitchenette		0	0	0	1	0	1	
344	Studio	RESERVED	0	0	0	0	0	0	
345	Apt - Kitchenette	Aquino, Annie	1	1	0	0	0	1	
346	Apt - Kitchenette	Smith, Adelaide	1	1	0	0	0	1	
348	Studio	Out of Inventory	0	0	0	0	0	0	
349	Apt - Kitchenette	Midkiff, Peggy	1	1	0	0	0	1	
350	Apt - Kitchenette	Memory, Billie	1	1	0	0	0	1	
<b>BENNETTE</b>			<b>16</b>	<b>15</b>	<b>1</b>	<b>3</b>	<b>0</b>	<b>18</b>	

<b>LATHAM</b>									
261	Apt - Kitchen	Hicks, Bruce	1	1	0	0	0	1	9/7/2023
262	Studio	Smith, Helen	1	1	0	0	0	1	
263	Studio Deluxe	Out of Inventory	0	0	0	0	0	0	
264	Studio Deluxe	Pait, Hazel	1	1	0	0	0	1	
265	Apt - Kitchenette	Out of Inventory	0	0	0	0	0	0	
266	Apt - Kitchenette	Nesbit, Jean	1	1	0	0	0	1	
267	Studio	Out of Inventory	0	0	0	0	0	0	
268	Apt	Out of Inventory	0	0	0	0	0	0	
269	Studio	Out of Inventory	0	0	0	0	0	0	
270	Apt	Out of Inventory	0	0	0	0	0	0	
271	Studio Plus	Out of Inventory	0	0	0	0	0	0	
272	Apt	Out of Inventory	0	0	0	0	0	0	



417	Caswell	Pearce, Alice	1	1	0	0	0	1	1									
418	Alamance	Wilkerson, Fred	1	1	0	0	0	1	1									
419	Alamance	Alaifs, Arline	1	1	0	0	0	1	1									
420	Caswell	Hester, Sarah	1	1	0	0	0	1	1									
421	Alamance	NeSmith, Billie	0	0	0	0	0	1	1									
422	Forsyth	Boyette, Virginia	1	1	0	0	0	1	1									
511	Davidson	Berthold, Shirley	1	1	0	0	0	1	1									
512	Guilford	Gardner, Wilma	1	1	0	0	0	1	1									
513	Randolph	Hamrick, James and Gladys	2	1	1	0	0	1	1									
514	Caswell	Wilson, Ann	1	1	0	0	0	1	1									
515	Forsyth	King, Dorsey & Mary Ann	2	1	1	0	0	1	1									
516	Caswell	Acker, Kenneth	1	1	1	0	0	1	1					6/1/2023				
517	Alamance	Archer, Susan	1	1	0	0	0	1	1									
518 ADA	Alamance	Peoples, Eima	1	1	0	0	0	1	1									
519	Caswell	Donnell, Connie	1	1	0	0	0	1	1					7/24/2023				
520 ADA	Alamance	Ross, Virginia	1	1	0	0	0	1	1									
521	Forsyth		0	0	0	0	1	1	1									
<b>INDEPENDENT LIVING South Wing</b>													<b>48</b>	<b>36</b>	<b>11</b>	<b>7</b>	<b>3</b>	<b>46</b>

<b>INDEPENDENT LIVING West</b>														
101 CL	Yadkin	Hale, Robert & Penny	2	1	1	0	0	1	1					8/16/2023
103 CL	Yadkin	Wanless, Ron & Penny	2	1	1	0	0	1	1					6/7/2023
105	Iredell	Merryman, Gene & Martha	2	1	1	0	0	1	1					6/14/2023
107	Wilkes	Kirkman, Susan	0	0	0	0	0	1	1					
109	Wilkes	Ulrich, Helen	1	1	0	0	0	1	1					8/15/2023
110 ADA	Chatham		0	0	0	0	1	1	1					
112	Chatham	Simpson, Bob	1	1	0	0	0	1	1					8/1/2023
113 CL	Iredell	Jeffries, Marti	1	1	0	0	0	1	1					8/23/2023
114	Davie	Anderson, Jane	0	0	0	0	0	1	1					
115	Davie	Wyrick, Linda	1	1	0	0	0	1	1					9/6/2023
223	Yadkin	Hibshman, Richard & Joyce	2	1	1	0	0	1	1					7/6/2023
224	Wilkes	Delaune, Francis & JoAnn	2	1	1	0	0	1	1					8/16/2023
225	Yadkin	Johnson, Bob & Laurelee	2	1	1	0	0	1	1					6/15/2023
226 ADA	Unit G - deluxe 1 br	Cox, Lib	1	1	0	0	0	1	1					9/20/2023
227 CL	Iredell	Levin, Bob & Ellen	2	1	1	0	0	1	1					6/8/2023
228	Wilkes		0	0	0	0	1	1	1					
229	Wilkes	Heller, Linda	1	1	0	0	0	1	1					6/20/2023
230	Iredell	Walter, Edwin / Stanley, Robin	0	0	0	0	0	1	1					
231	Wilkes	Young, Judy	1	1	0	0	0	1	1					5/31/2023
232 CL	Unit H - Davie	Rafanovic, Frances	0	0	0	0	0	1	1					10/4/2023
233	Iredell		0	0	0	0	1	1	1					
234	Davie		0	0	0	0	1	1	1					
235	Davie	Foster, Nancy	1	1	0	0	0	1	1					8/18/2023
323	Yadkin	Dille, Thomas & Paula	2	1	1	0	0	1	1					7/27/2023
324 ADA	Wilkes	Ayres, Bruce & Livingston, Patsy	2	1	1	0	0	1	1					6/5/2023



2A	1 BR	Lyons, John	1	1	0	0	0	1		
2B	1 BR	Dell Orfano, Robert	1	1	0	0	0	1		
2C	1 BR	Sansbury, Amelia	1	1	0	0	0	1		
2D	1 BR		0	0	0	0	1	1		
2E	1 BR	Troxter, George	1	1	0	0	0	1		
4A	2 BR	Casey, Adele	1	1	0	0	0	1		
4B	2 BR	Haun, Patrick	1	1	0	0	0	1		
6A	1 BR	Kirkman, Susan	1	1	0	0	0	1		
6B	1 BR	Yarbrough, Tommy & Peggy	2	1	1	0	0	1		
6C	1 BR	Russell, Dot	1	1	0	0	0	1		
6D	2 BR	Miller, Mary Ella	1	1	0	0	0	1		
6E	2 BR	Wilmoth, Maria	1	1	0	0	0	1		
6F	2 BR	Davis, Mary	1	1	0	0	0	1		
6G	2 BR	Roberts, Susan	0	0	0	0	0	1		
6H	2 BR	Sharp, Alicia	1	1	0	0	0	1		
6J	2 BR	Holt, Becky	1	1	0	0	0	1		
<b>COTTAGES</b>			<b>15</b>	<b>14</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>16</b>		
<b>HOUSES</b>										
1ESC	House	Rathbone, Robert & Patricia	2	1	1	0	0	1		
2ESC	House	Wilkerson, Thomas and Lynn	2	1	1	0	0	1		
3ESC	House	Dietz, Jane	1	1	0	0	0	1		
1FRAT	Duplex	Wells, Ellen	1	1	0	0	0	1		
3FRAT	Duplex	Richman, Rich & Margaret	2	1	1	0	0	1		1/26/2023
701FREE	House	Wilson, Ruth	1	1	0	0	0	1		
702FREE	House	Griffin, Peggy	1	1	0	0	0	1		
703FREE	House	Payne, Ella	1	1	0	0	0	1		
704FREE	House	John & Marilyn Lauritzen	2	1	1	0	0	1		
705FREE	House	Phillips, Edgar	1	1	0	0	0	1		
706FREE	House	Walters, Jack & Sue	2	1	1	0	0	1		
707FREE	House	King, James & Joan	2	1	1	0	0	1		
708FREE	House	Vinroot, Robert & Pat	2	1	1	0	0	1		
709FREE	House	Proudfit, John & Donna	2	1	1	0	0	1		
710FREE	House	Wegner, Gary & Sandra	2	1	1	0	0	1		
801FREE	House	Carlson, Chuck and Carol	2	1	1	0	0	1		
803FREE	House	Workman, Annette	1	1	0	0	0	1		
805FREE	House	Bowers, Earl & Cindy	2	1	1	0	0	1		1/16/2023
807FREE	House	Robbins, Alice	1	1	0	0	0	1		
900FREE	House	Newton, Donna & Bob	2	1	1	0	0	1		
901FREE	House	Hogarh, Karen	1	1	0	0	0	1		
902FREE	House	Cole, Herbert & Dixie	2	1	1	0	0	1		
903FREE	House	Tom Parham & Nancy Howard	2	1	1	0	0	1		
905FREE	House	Ostrowski, Elaine	0	0	0	0	0	1		10/4/2023
907FREE	House	Beal, Ernestine	1	1	0	0	0	1		

1001FREE	Duplex	George & Joyce Mantooth	2	1	1	1	0	1	1	1	1	1
1003FREE	Duplex	Carpenter, Carol	1	1	1	0	0	1	1	1	1	1
1005FREE	House	Brady, Jack & Pat	2	1	1	1	0	1	1	1	1	1
1098FREE	House	Etherington, Donald & Lallier, Monique	2	1	1	1	0	1	1	1	1	1
1100 FREE	House	Fritz, Ted	1	1	1	0	0	1	1	1	1	1
700RL	House	Phelps, Ed & Jean	2	1	1	1	0	1	1	1	1	1
701RL	House	Aebersold, Nancy	1	1	1	0	0	1	1	1	1	1
702RL	House	Sigmon, Katy	1	1	1	0	0	1	1	1	1	1
703RL	House	Caison, Amelia & Leslie	2	1	1	1	0	1	1	1	1	1
704RL	House	Finley, Jean Anne	1	1	1	0	0	1	1	1	1	1
705RL	House	Sienkiewicz, Margery	1	1	1	0	0	1	1	1	1	1
706RL	House	Moore, Ron & Brenda	2	1	1	1	0	1	1	1	1	1
707RL	House	Inman, Dennis	1	1	1	0	0	1	1	1	1	1
709RL	House	McCrickard, Donald	1	1	1	0	0	1	1	1	1	1
1SRC	House	Williams, Genevieve	1	1	1	0	0	1	1	1	1	1
3SRC	House	Cates, Peggy	1	1	1	0	0	1	1	1	1	1
4SRC	House	Atwell, Alan and Betty	2	1	1	1	0	1	1	1	1	1
5SRC	House	Russell, Eugene & Evelyn	2	1	1	1	0	1	1	1	1	1
6SRC	House	Butch & Marcia Freed	2	1	1	1	0	1	1	1	1	1
7SRC	House	Henderson, Mary Anne	1	1	1	0	0	1	1	1	1	1
8SRC	House	Nance, Buddy & Miriam	2	1	1	1	0	1	1	1	1	1
9SRC	House	Lewellyn, Gene & Maggie	2	1	1	1	0	1	1	1	1	1
10SRC	House	Windham, Gordon & Jeanette	2	1	1	1	0	1	1	1	1	1
1YRC	House	Davis, Jerry & Sylvia	2	1	1	1	0	1	1	1	1	1
2YRC	House	Stewart, Linda	1	1	1	0	0	1	1	1	1	1
3YRC	House	Doughton, Walter and Barbara	2	1	1	1	0	1	1	1	1	1
4YRC	House	Pell, Gerald & Suzanne	2	1	1	1	0	1	1	1	1	1
5YRC	House	Bhagat, Abe & Zulie - Fri 9/8	0	0	0	0	0	0	0	1	1	1
6YRC	House	Leone, Mike	1	1	1	1	0	1	1	1	1	1
<b>HOUSES</b>			<b>81</b>	<b>52</b>	<b>30</b>	<b>0</b>	<b>0</b>	<b>24</b>	<b>16</b>	<b>2</b>	<b>54</b>	<b>213</b>

TOTALS					
# Residents	Occupied	2nd per	Available	Sold/Reserved	Total Units
237	173	61	24	16	213

213	Total Units
173	Occupied
81%	% Occupied
189	Sold/Reserved
89%	% Sold/Reserved

\*8 cottages are 1BR & 8 are 2BR



- Foundation
- Out of Inventory/under Const.
- Resident Expired/30 day Wait
- Sold/Reserved - Paid 10%
- Available
- Transfer

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## Expansion Sales Inventory

Date: 30-Sep-23

<b>EXPANSION SALES INVENTORY</b>			
<b>Unit Breakdown</b>	<b># Units Total</b>	<b># Units Available</b>	<b># Units Sold</b>
Chatham / 850 sf /1BR	10	5	5
Wilkes / 962 sf / 1 BR Den	19	2	17
Iredell / 1155 sf / 2 BR	17	5	12
Yadkin / 1303 sf/ 2BR Sunroom	10	0	10
Davie / 1391 sf/ 2BR Den End Unit	8	1	7
G / 885 sf/ 1 BR Deluxe	1	0	1
H / 1400 sf/ 2BR Den End Unit	1	0	1
Penthouse / 1850 sf/ 2 BR Den 3 balconc	1	0	1
<b>TOTAL</b>	<b>67</b>	<b>13</b>	<b>54</b>
<b>Cumulative 2023 Sales: 28</b>			



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# JULY 2023

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

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*WhiteStone*  
A MASONIC & EASTERN STAR  
COMMUNITY  EST. 1912  
Founded on fellowship. Inspired by you.

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

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# VISIBILITY JULY 2023

## 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 Friday

## WHITESTONE FRATERNAL VISIBILITY

DATE(S):	MEETING(S)/EVENT(S)
Cancelled due to July 4 <sup>th</sup> Holiday	Masonic Luncheon at WhiteStone
July 8 <sup>th</sup>	MESH Lodge #771

## WHITESTONE RESIDENTS: COMMITTEES, SERVICES & SUPPORT

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
As Needed:	WhiteStone COVID Task Force
Monthly:	WhiteStone Resident Committee: Marketing [1 <sup>st</sup> Wednesday]
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: Environmental Services (Building & Grounds) 2 <sup>nd</sup> Monday
Monthly:	WhiteStone Resident Committee: Campus Care Alliance [3 <sup>rd</sup> Tuesday]
Monthly:	WhiteStone CWC QAPI [3 <sup>RD</sup> Thursday] (Construction Townhall with F.L. Blum)
Monthly:	WhiteStone Resident Committee: Auxiliary [3 <sup>rd</sup> Wednesday]

**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 12<sup>th</sup>** *Site Visit with Jacob Elliott, Director of Operations Management*
- July 10<sup>th</sup> – 12<sup>th</sup>** *Site Visit with Jon Back, Clinical Specialist, LCS*
- July 10<sup>th</sup>** *Logan Business Unit Meeting*

**WHITESTONE EXPANSION: PROJECT(S) & REPORTING**

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

- Weekly:** *WhiteStone Expansion – OAC Weekly Mtg.*
- Weekly:** *Construction Update with LCSD*

**WHITESTONE TECHNOLOGY INFRASTRUCTURE: PROJECT(S) & REPORTING**

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

- Ongoing:** *Campus Wireless Network (SingleDigits)*

**WHITESTONE NEW RESIDENT: PROSPECTING EVENT(S):**

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

- July 11<sup>th</sup>** *Brunch and Learn Prospect Event at WhiteStone*
- July 19<sup>th</sup>** *New Resident Orientation*
- July 20<sup>th</sup>** *Off Site Prospect Event – Downsizing with Keller Williams*

## WHITESTONE EMPLOYEE: JULY ANNIVERSARIES

SERVICE DATE:	EMPLOYEE NAME:	TITLE:	DEPARTMENT	YEARS OF SERVICE:
	<i>Timothy Bellamy</i>		<i>Security</i>	<i>1 year</i>
	<i>Mandy Duncan</i>		<i>Environmental Services</i>	<i>1 year</i>
	<i>Amara Giles-Robinette</i>		<i>Food and Beverage</i>	<i>1 year</i>
	<i>Tanya Hayes</i>		<i>Nursing</i>	<i>1 year</i>
	<i>Leslie Mulvey</i>		<i>Nursing</i>	<i>1 year</i>
	<i>Natalie McMasters</i>		<i>Nursing</i>	<i>2 years</i>
	<i>Rosa Moore</i>		<i>Nursing</i>	<i>2 years</i>
	<i>Karla Stapleton</i>		<i>Health and Wellness</i>	<i>2 years</i>
	<i>Dani Valentine</i>		<i>Food and Beverage</i>	<i>2 years</i>
	<i>Allison LeTourneau</i>		<i>Community Life Services</i>	<i>3 years</i>
	<i>Austin Russell</i>		<i>Nursing</i>	<i>4 years</i>
	<i>Vanessa Hartso</i>		<i>Nursing</i>	<i>7 years</i>
	<i>Amanda Cottrell</i>		<i>Community Life Services</i>	<i>16 years</i>

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

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

**Weekly:** *New Hire and General Orientation*

**July 27<sup>th</sup>** *Employee Recognition at Resident Council*



## KEY PERFORMANCE INDICATORS – JULY 2023

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

YTD EXPPOR	Operational expense budgeted at 10,439,193 with actual of 9,819,567. A positive variance of 619,625 YTD. EXPPOR YTD budget at 7,192 with actual 7,011, a positive variance of \$181 or 2.5%.
YTD NOI	Actual of (1,108,345) on budget of (1,205,048), a positive variance of 96,703.
IL MTD Occupancy	Average occupancy of 160.0 on budget of 173 (error). Ended the month with 163 occupied and currently sit at 166, which is at budget. Began moving into expansion IL units on 5/30, increasing capacity to 213. Expansion move-ins expected to be slower than planned due to ongoing issues with construction. six more planned move ins remaining in August will increase occupancy to 172, ahead of budget.
YTD Net Sales IL	Budget 7 with actual net sales at 7. Higher number of cancellations YTD (x23) related to expansion. Sales team slowed by lack of available inventory with villas and cottages being fully occupied. Have built a strong wait list for villas. Looking to take advantage of this wait list to encourage current villa residents to transition to apartments.

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

YTD REVPOR	Operational revenue budgeted for 9,234,144 with actual at 8,711,222. A negative variance of (522,922). YTD REVPOR budget at 6,362 with actual of 6,220, a negative variance of (142) or % variance of (2.2%). Health Services revenue off budget (340,989) due to renovation delays. REVPOR % variance of (7.8%). Due to delay in construction and budget error in MCD
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line causing a negative variance o 819K. Expect census improvement by end of August.

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

Days in AR	362,924 at 90 days outstanding or 31%, a negative variance to 15% goal of (185,693). Improvement over June of 41,222 and 54% reduction in over 90 since Feb. In the health center 362,813 in outstanding 90 day balance. Insurance at 188,442, MCR at 106,118, and Pvt 67,531. LCS Reliance continues supporting AR efforts. Expect continued improvement over next two months as MCR / INS claims have been refiled.
Memory Care MTD Occupancy	Residents were transitioned to long term care beds on 5/16, to allow for final phase of renovations. Once new AL opens, will be transitioning residents from IL to rebuild occupancy. MC Occupancy will remain red until AL building complete and approved for occupancy.
YTD Closings IL	Budget of 64 versus actual of 36. Budget includes expansion move ins but construction delays have negatively impacted move ins. 12 scheduled move ins for August but will remain off budget YTD -24 at end of month. The impact of construction delays will be felt the remainder of the year causing the dashboard light to remain red
YTD Move Ins IL	Budget of 62 versus actual of 27. Budget includes expansion move ins but construction delays have negatively impacted move ins.
HC MTD Occupancy	Average occupancy for the month at 65.4 budget at 68. New Admissions Coordinator has recently onboarded. With this transition, we did see a slump in admissions but we anticipate being at budget by the end of the month.





## COVID-19 TASKFORCE & UPDATE(S) – JULY 2023

Today, we continue to offer the bivalent vaccine on campus to those eligible and have better than 95% of our residents and staff vaccinated. WhiteStone remains committed to doing all it can to protect our community and continue to encourage all residents and employees to be vaccinated each season as appropriate.

### WHITESTONE LEADERSHIP TEAM: DIRECTOR'S REPORTS

DIRECTOR NAME -	DEPARTMENT -
Mrs. Tracy Armwood, SPHR	Director, Human Resources
Mr. Robert Reese	Director, Environmental Services
Mr. Rick Hatch	Director, Plant Operations
Ms. Doris Nance	Director, Clinical Services
Mr. Josh Hillegass, LNHA	Health Services Administrator
Ms. Marie Dunn	Director, Marketing & Sales
Ms. Jenna Grant	Director, Fraternal Friendship
Mr. Mark Lewis, LNHA	Executive Director
Mrs. Gina Prevost, LRT/CTRS	Director, Community Life Services
Mrs. Misty McAden	Director, Spiritual Services & Chaplain
Ms. Nikki Stafford	Director, Finance
Mr. Jonathan Szarke	Director, Food & Beverage

## I. WHITESTONE HEALTH CENTER ADMINISTRATION REPORT

### JULY 2023 OVERVIEW

WhiteStone is excited to see continued progress on our 200 Neighborhood, which is Phase 4 of our construction in the Care and Wellness Center. At the completion of Phase 4, the Care and Wellness Center will finish all our renovations and return to our total bed capacity of 88. At the completion of this phase of construction, the Care and Wellness Center will have additional private rooms throughout the Center that we have seen increased interest in from both current Residents and prospective Residents.

The Care and Wellness Center has been actively engaged with our Resident Committees both the Campus Care Alliance and the Auxiliary Committee. We are thankful to have such engaged and supportive residents throughout the WhiteStone Community, and our Residents are thankful for the care they are shown. Whether it be advocating for the healthcare services across the campus or hosting men's coffee or women's tea at the Care and Wellness Center, we can't express enough our thankfulness to these Committees and their members!

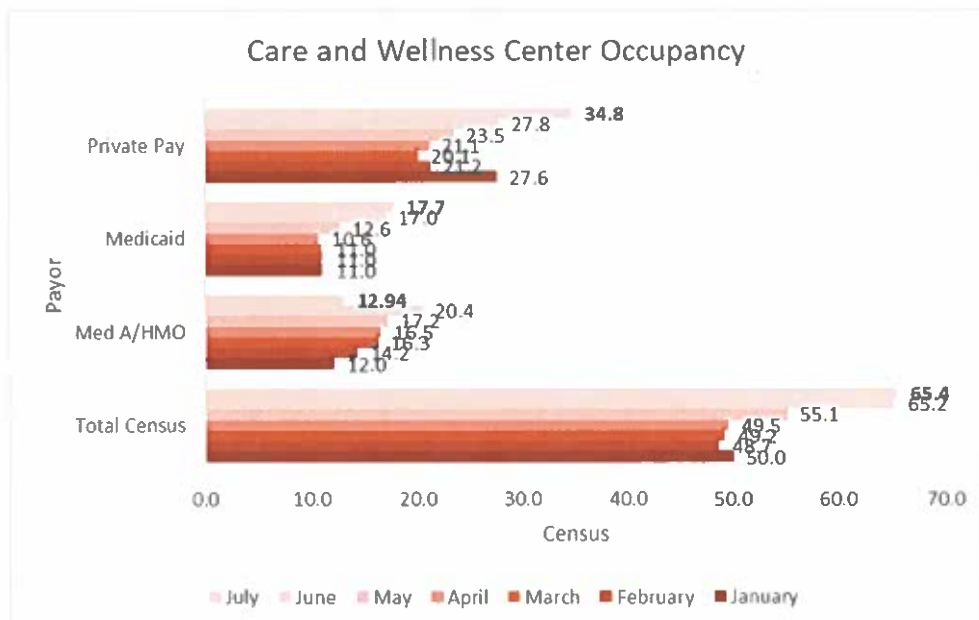
In addition to the above, we also celebrated the 4th of July with our Residents and Staff in the Care and Wellness Center. Our Community Life Services Team in conjunction with our Food and Beverage Department did a great job in hosting a cookout for Staff and Residents alike. We are always thankful for opportunities for fellowship and celebration!

## Census Updates

For the month of July, the Care and Wellness Center continues to maintain strong occupancy, averaging 88% occupancy. Month over month, we did see a slight decrease in our Medicare A / HMO census and an increase in our Private Pay census which are both related as many of our Medicare A / HMO Residents decided they needed additional time at the Care and Wellness Center beyond what the insurance provider would cover. In total though, we continue to exceed our budget for census, and I am confident that this trend will continue.

At the beginning of July, our Admissions Coordinator, Kelly Norris, did submit her notice that she would be stepping down from her role. Kelly had been with WhiteStone for nearly 17 years. As Kelly is looking to further her education and change direction for her career path, we wished her well on her new adventures.

We are thankful to be bringing on board Brittany Brown, our new Admissions Coordinator. Brittany comes to us with a wealth of experience in different healthcare settings, but most recently as an Admissions and Marketing Director of a Skilled Nursing Facility. I am looking forward to Brittany integrating with our team and continuing to develop census and our marketing efforts over her tenure.



## Clinical Updates

During the week of July 10th, we had a Clinical Review completed by our Life Care Services Clinical Specialist, Jon Back. This was Jon's first visit to WhiteStone and being so, he compiled a comprehensive review for our benefit and his baseline knowledge of our Community.

Jon identified several areas of focus for our Community and his overall scorecard can be found below. As a result of Jon's visit, our Clinical Leadership Team has created a focus on five areas in particular to begin to address some of the identified areas of opportunity. These five areas are wounds, our fall prevention program, psychotropic medications, comprehensive care plans, and bedrails. Our Clinical Leadership Team has been hard at work since his exit to audit, educate, and provide ongoing monitoring to these systems, and we have begun to see improvement in the above areas.

Additionally, during the month of July, our Clinical Leadership Team began their partnership with Healing Partners. Healing Partners are experts in wound care and treatment, who will be working to supplement the work that Randolph Primary Care does for our Residents. We are thankful for their partnership, and we believe it will continue to best serve our Residents.

COMMUNITY		CLINICAL SPECIALIST	
<b>Whitestone</b>	Overall Score	<b>Jon Back, RN</b>	
REVIEW COMPLETION DATE		<input checked="" type="checkbox"/> Onsite Visit	<input type="checkbox"/> Virtual Visit
July 13, 2023	<b>78%</b>	Heartfelt Connection Certification <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> Gold <input type="checkbox"/> Silver	
REVIEW COMPONENTS	Individual Component Scores	Budgeted Census <b>64</b>	Actual Census <b>60</b>
		Comments	
Resident Rights	91%		
Free from Abuse, Neglect and Exploitation	73%		
Quality of Life/Activities of Daily Living	82%		
Assessment & Comprehensive Care Plans	55%		
Life Enrichment and Heartfelt Connections	91%		
Social Services/Behavior Management	64%		
Bowel and Bladder Management	82%		
Event Management	55%		
Nutrition/Hydration Management & Dialysis	73%		
Pain Management	82%		
Skin and Wound Management	73%		
Discharge Planning	91%		
Daily Clinical Meeting	55%		
Weekly Risk Meeting	82%		
Physician and Nursing Services	91%		
Medication/Order Management	91%		
Food/Beverage and Dining Services	91%		
Infection Prevention and Control	82%		
Physical Environment	82%		

# I. WHITESTONE HUMAN RESOURCES REPORT

## TURNOVER:

19.2% turnover YTD 2023. Compared to 27.69% through July 2022.

## OVERTIME:

870.03 of OT for July. Compared to 664.02 hrs for July 2022 . An increase of 206.09 hrs on the month and total YTD increase in overtime from last year by 2141.64 hrs.

## WORKERS COMPENSATION:

We have one work claim that we just filed 8/4/23. An employee working in the CWC kitchen hit her head on the steamer door which was open. This caused a contusion on the forehead.

## EEOC & LEGAL UPDATE(S):

On 8/3/23 we received an EEOC charge of discrimination based on race filed by a current CNA. The complaint resulted from an incident with another employee back in March in which the complainant accused them of stealing a room spray from her bag. The incident was investigated and was unsubstantiated.

## RECRUITMENT UPDATE(S): We are currently recruiting for:

MONTHLY TURNOVER		
	2023	2022
Jan	1.65%	5.61%
Feb	0.41%	4.88%
Mar	4.68%	3.60%
Apr	2.16%	3.65%
May	2.62%	4.63%
Jun	2.04%	1.78%
Jul	4.35%	3.54%
Aug	%	%
Sep	%	%
Oct	%	%
Nov	%	%
Dec	%	%
<b>TOTAL</b>	<b>19.15%</b>	<b>36.26%</b>

Job Title	# of Openings	New Candidate Pipeline	Attempting to Contact	Interviews Scheduled	Offers Pending
Charge Nurse - 1st shift Fulltime	3		23	3	
Charge Nurse - 1st shift Part time	2		21		
Charge Nurse - 2nd shift Fulltime	3		23	3	
Charge Nurse – 2 <sup>nd</sup> shift Part time	1		21		
CNA - 1st shift Fulltime	3		29	3	
CNA - 2nd shift Fulltime	2		29	3	
CNA - 2nd shift Part time	1		29	3	
Health and Wellness Nurse - PT	1		0		
Staff Accountant	1		2		
AL Manager - RN	1		4		
CLS Coordinator	2		7	1	
Custodian - Fulltime	2		9		
Nurse - AL MC 2nd	1		23		
total openings:	23			Total Offers:	
Openings after Offers:			19		

## Recruiting

We are excited to have hired a new recruiter. July 27th Terri Jones joined the HR team. She is off to a great start scheduling interviews and making offers. We continue to hold weekly new hire orientation and have been doing so since May. We plan to continue weekly orientation potentially through September. We have hired 63 new hire since May 1st thru today.

## Retention

We are focusing a priority on department onboarding and job specific training. We are reviewing department training to ensure timely and adequate training, mentor assignments, and new hire support to ensure a successful onboarding.

## Recommendations and/or Other Information

We will begin working on budgets soon. Have identified a few areas to focus: RNs, CNAs and Maintenance.

## III. WHITESTONE MARKETING & SALES REPORT

Monthly Marketing Report				
July 2023				
<b>Current Occupancy:</b>	163	75%		
<b>Sold Occupancy:</b>	192	90%		
<b>Expansion Sales:</b>	53	79%		
<b>Available Units:</b>	<u>Villa</u>	<u>Cottage</u>	<u>IL Apts</u>	<u>Res Apts</u>
	0	1	18	2
<b>Explanation:</b>	<u>Villa</u>	<u>Cottage</u>	<u>IL Apts</u>	<u>Res Apts</u>
			221,312,416,411	
		2D	114,228,230,231	343 Ben
			233,234,330,426	146 Ben
			430,431,432,434	
			437,532	
<b>Sales:</b>	6	905,232,101,423,332,226		<b>Exp Cancel:</b> 4
<b>Transfers:</b>	1	324 to 326		
<b>Move In: (July)</b>	9		<b>Upcoming MI: (35)</b>	Expansion plus IL322,905FM
<b>Upcoming MO:</b>	2		<u>Reason</u>	<u>Est. M/O</u>
	IL 521		HLOC	TBD
	5 YRC		Expired	8/31
<b>Upcoming Events:</b>	8/11	Grand Opening		

**Department****Highlights:**

Expansion Move-Ins  
 Focus on setting a quarterly whole home networking event  
 Begin planning for CWC + IL Marketing Collab for Business Dev partners  
 External Business Development Opportunities

**Recruitment****Update:**

Currently Full Staff

## IV. WHITESTONE PLANT OPERATIONS REPORT

- Continue to work with COG on permitting 601 Gay Terrace which requires an architect to draw life safety plan and appendix B.
- Finalized badge access and EZ pass access at front gates. Programming in process
- Securing quote from MSI to add annunciator from new alarm system to closer proximity to JCI panel.
- Experienced Water initiated closed loop cleaning and Legionella testing.
- Worked with TCS, MSI and Nikki on access control at Coapman street gate.
- Conducted scheduled maintenance on SARA pendants.
- Continue to work closely with Brightview on landscaping and grounds issues.
- Work with FLB and Jeff Louk on punch and warranty items.
- Changed Duke E accounts to Whitestone.
- Attended training with maintenance staff on new PME and alarm systems equipment in ALMC.
- Working with Carolina Cat on the new CWC generator. Engineering Phase.
- Have assessed many rainwater leaks at CWC and other basement areas of campus. Repairs are underway.
- Securing quotes on capital projects: painting, laundry equipment.
- Had a washer fail. Replacement part estimates 9500-11000. Accelerated quote process.
- Performed quarterly SARA pendant testing.

## V. WHITESTONE OUTREACH REPORT: THE FOUNDATION

### JULY 2023 OVERVIEW

#### ASSISTANCE:

- *Outreach Totals of \$10,150,72 for a total of (9) members:*
  - (9) long term members
  - (0) short term members (Emergency)
- *WhiteStone residents receiving assistance (17)*
  - (17) independent living
  - (0) memory care

## **NEW REFERRALS: SCHOLARSHIP & OUTREACH:**

*(13) potential referrals are being processed by our Outreach Coordinator*

- *(5) are for scholarships (Move-In Assistance)*
- *(6) are for Long Term Assistance*
- *(2) for Short-Term / Emergency Assistance*
- *(0) may fall into Outreach or Scholarship in time*

If you know of a member needing assistance, please contact our Director of Fraternal Friendship at [igrant@meshhome.org](mailto:igrant@meshhome.org) or by calling (336)601-5593.

## **VI. WHITESTONE FINANCE REPORT**

Ongoing - The 401k audit is well underway.

Ongoing -The 990 will be the next filing I work on.

Ongoing -- There is still one year that needs to be corrected as it relates to the 401k Compliance testing situation and that is 2020. This will have to be corrected by 12/31/2023. One touch base call with all the communities has been held and will continue to be done throughout the year.

Ongoing -Accounts Receivable – The team has worked hard on accounts receivable, and we’ve learned a few more nuances with PCC. We have also engaged LCS Reliance to assist in working the aging as well. This is still ongoing, and the affects are not as immediate but there is still a lot of work going into this from my staff and LCS reliance. Lots of work continues on this. Between collecting on accounts, contractual adjustments being posted and some write offs (due to incorrect billing amounts in MyUnity) there has been tremendous improvement. While there is still a lot of work to do I can say that current A/R has been processing better and collections are more timely.

Ongoing - recruitment of Staff Accountant in addition to AR Billing Coordinator.

Move ins are still busy in the accounting department as well as Mary works to ensure files are complete.

Entrance Fees from expansion sales have started being transferred to BNY to the entrance fee redemption account.

## **VII. WHITESTONE FOOD & BEVERAGE**

### **AL Staffing**

We’ve resumed recruiting for our open AL positions. We have several strong candidates and are looking to make offers. This leaves us with a few positions still open, so we are continuing to recruit to get these roles filled.

### **IL A La Carte Menu**

We’ve begun revamping our ALC menu to reflect new residents’ tastes. Specifically, we’ve upgraded our steak selections and are working on a “Chophouse” menu theme. We anticipate releasing the updated menu in late August.

## IL Bistro

We've updated our staffing schedule to better accommodate a higher volume of customers mid-to-late shift. This will allow us to make sure that all closing duties are done accurately and consistently.

### Server Training

We've been working on some additional Server training in IL, including covering an updated Server Training Manual and Checklist. This is helping to enhance our resident experience.

### Cross Training

We've been busy cross training several staff so they can be utilized in different roles. This has helped us during periods of being understaffed so that service hasn't been interrupted.

## VIII. WHITESTONE COMMUNITY LIFE SERVICES REPORT

**CLS STAFFING UPDATE(S):** Stable with current employees – Have the following positions open – will hire for these as I get the green light.

- 2 full time in Assisting Living and 1 part time (not hiring yet)

- 1 full time in Independent Living- Andrew Howard, Jr. he accepted the position and will hopefully be in orientation on August 17th (next week)

- 1 full time in Care and Wellness Center (2nd interview to be scheduled for Hollis Sherman)

### CLS PROJECT UPDATE(S):

Tracking resident volunteer(s) and hours to enhance program and opportunities.

Total – 196 hours and 10 minutes = 8.167 days of volunteer work in the month of July.



**CLS Independent Living Programming:**

Total Number of Activities: 68

Total Number of Sessions: 170

Total Number of Cancellations: 3

Total Participation: 2263

Average Participation: ~13.3 (13)

Participation Percentage: 95.6%

\*(65/69 Activities had participants)

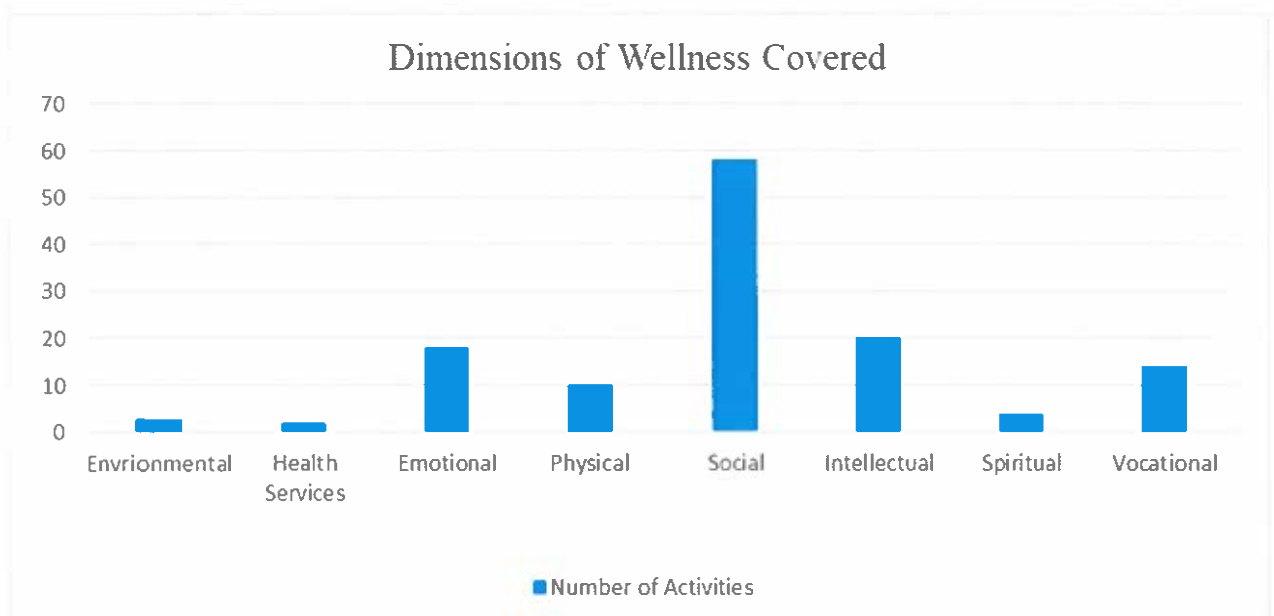
Resident Percentage: 65%

\*Participated in at least one (1) activity

Total Number of Check-Ins: 161

**Changes since June:**

- Total Number of Activities decreased by 13 (16.05% Decrease)
- Total Number of Sessions decreased by 13 (7.1% Decrease)
- Total Participation increased by 260 (12.98% Increase)
- Average Participation increased by 2.5 (23.15% Increase)
  - (Note Correction: Average = Total Participation/Total Number of Sessions)
- Participation Percentage increased by .5%
- Resident Participation decreased by 8.6%
- Total Number of Check-Ins increased by 42 (35.29% Increase)
- **9 Sessions of Intergenerational Activities (Chess with Students, Jefferson Elementary Game Day)**



### Other Items:

- 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 and in to Point Click Care as we get them.
- Working with Lora to develop a program for the new assisted living memory care.
- Working with Mandy, Lora, and Allison to develop a program for low functioning residents in the care and wellness center.
- Working with Mandy, Lora, and Allison to develop a schedule to keep residents in living rooms active in between scheduled activities.
- Continuing to work on Chit Chat and Care Center Connections – due once a month.
- Continue to work on the next month’s calendar preparation.
- Continuing to edit and add email addresses for CWC family members.

## IX. WHITESTONE CHAPLAIN & SPIRITUAL SERVICES REPORT

Sunday services – 5 services

Funerals officiated- 0

Recorded Encounters (not counting group activities, some brief encounters or phone calls)

CWC – 40+ (some with family present)

IL- 35 +

Employee – 0

Weekly Bible studies/worship

CWC/Wisteria combined 4 (with singing)

IL – 4

Other activities: Sing-Along

Meetings: CWC daily report, “traffic” meeting, spiritual support committee, Auxiliary committee, Resident Council

Miscellaneous: attended IL coffees and other activities as able, attended CWC ice cream social, attended CWC cookout, Assisted with Resident Orientation, card ministry, prepared articles for newsletters, liaison between Eucharist minister and Catholic residents, lunch/dinner walk throughs to greet residents

Working on the following: scheduling Rabbi lunch for August, researching “pet blessing” for October, ways to support new residents, employee support.



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## WHITESTONE EXPANSION REPORT(S)

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### Updates/Accomplishments – July 2023

#### Site Work

- Final pavement in place.
- Landscaping & Irrigation complete
- Dead landscaping being identified for fall replacement
- Irrigation meter installed work in progress to repair damaged lines by Duke Energy during light post installation

#### CWC – Care and Wellness Center:

- Phase 4: Final Phase - Renovation started May 22, 2023
  - Flooring in resident rooms installed
  - Tile work completed
  - Mechanical units replaced
  - Drywall finishes and painting in progress
  - Flooring to be installed first week of August
- Pool Renovation:
  - Pool is complete and Temporary Certificate of Occupancy has been obtained.
  - Department of Health has approved for use by independent living residents.
  - Final approval will be with DHSR inspection. DHSR inspection was completed on October 11. Due to code requirements, we will not be able to allow occupancy of Care and Wellness residents until post completion of the Assisted Living
  - Added lighting and revisions in progress

#### IL – Independent Living:

- Temporary Certificate of Occupancy received 5-22-23
- Final punch work being completed
- Apartments are being completed based on move in schedule
- Current schedule indicates all apartments to be completed middle of September
- Resident move-ins in progress, 21 closed

### **AL – Assisted Living:**

- Stocking permit achieved 5-19-22, allows for furniture installation
- Temporary Certificate of Occupancy received 6-30-23
- Finishes being executed at all levels
- DHSR initial inspection was July 5, 2023
- Completing noted items during inspection
- DHSR follow up inspection scheduled for August 1, 2023

### **Next Steps/Milestones**

- Obtain DHSR Life safety approval for AL/MC
- Obtain DHSR Licensure approval to occupy AL/MC
- Obtain TCO for Care and Wellness Center (CWC) Phase IV
- Obtain DHSR Life Safety approval for CWC Phase IV
- Obtain DSHR approval to allow Care Center residents to utilize the pool, this will be finalized when construction is completed for the Assisted Living
- Obtain final Certificate of Occupancy for Independent Living
- Obtain final Certificate of Occupancy for AL/MC
- Obtain final Certificate of Occupancy for CWC Phase IV

### **CONSTRUCTION FOOTAGE LINK:**

[https://www.youtube.com/playlist?list=PL7tINPs8fkXPuy7\\_wdXlm1vKPxy6-iZTf](https://www.youtube.com/playlist?list=PL7tINPs8fkXPuy7_wdXlm1vKPxy6-iZTf)



# August 2023

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

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*WhiteStone*  
A MASONIC & EASTERN STAR  
COMMUNITY  EST. 1912  
Founded on fellowship. Inspired by you.

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

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# VISIBILITY AUGUST 2023

## 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 Friday

## WHITESTONE FRATERNAL VISIBILITY

DATE(S):	MEETING(S)/EVENT(S)
August 1 <sup>st</sup>	Masonic Luncheon at WhiteStone
August 12 <sup>th</sup>	MESH Lodge #771
August 11 <sup>th</sup>	Site Visit with Mike Register, Committee on WhiteStone

## WHITESTONE RESIDENTS: COMMITTEES, SERVICES & SUPPORT

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
As Needed:	WhiteStone COVID Task Force
Monthly:	WhiteStone Resident Committee: Marketing [1 <sup>st</sup> Wednesday]
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: Environmental Services [Building & Grounds] 2 <sup>nd</sup> Monday
Monthly:	WhiteStone Resident Committee: Campus Care Alliance [3 <sup>rd</sup> Tuesday]
Monthly:	WhiteStone CWC QAPI [3 <sup>RD</sup> Thursday] (Construction Townhall with F.L. Blum)

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

**Monthly:** *WhiteStone Resident Committee: Auxiliary [3<sup>rd</sup> Wednesday]*

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

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

**August 4<sup>th</sup>** *Site Visit by Gene Jernigan, Board Chair*

**August 12<sup>th</sup>** *Quarterly Meeting of the Board of Directors*

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

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

**August 1<sup>st</sup> thru 3<sup>rd</sup>** *Mock Survey for Care and Wellness Center*

**August 11<sup>th</sup> & 12<sup>th</sup>** *Site Visit with Jacob Elliott, Director of Operations Management*

**August 10<sup>th</sup>** *Site Visit with Chris DeAngelis, Regional Director of Healthcare Marketing & Sales*

**WHITESTONE EXPANSION: PROJECT(S) & REPORTING**

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

**Weekly:** *WhiteStone Expansion – OAC Weekly Mtg.*

**Weekly** *Construction Update with LCSD*

**WHITESTONE TECHNOLOGY INFRASTRUCTURE: PROJECT(S) & REPORTING**

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



**WHITESTONE NEW RESIDENT: PROSPECTING EVENT(S):****DATE(S): MEETING(S)/EVENT(S)****August 11<sup>th</sup>** *Grand Opening Ceremony***August 15<sup>th</sup>** *Sales Presentation to Prospects***WHITESTONE EMPLOYEE: AUGUST ANNIVERSARIES**

<b>SERVICE DATE:</b>	<b>EMPLOYEE NAME:</b>	<b>TITLE:</b>	<b>DEPARTMENT</b>	<b>YEARS OF SERVICE:</b>
	<i>Jamie Bratcher</i>		<i>Nursing</i>	<i>1 year</i>
	<i>Cathie Gartland</i>		<i>Nursing</i>	<i>1 year</i>
	<i>Lawanda Lewis</i>		<i>Nursing</i>	<i>1 year</i>
	<i>Misty McAden</i>		<i>Chaplain</i>	<i>1 year</i>
	<i>Jonathan Perez Martinez</i>		<i>Food and Beverage</i>	<i>2 years</i>
	<i>Ambria Rainey</i>		<i>Health and Wellness</i>	<i>2 years</i>
	<i>Lauren Perdue</i>		<i>Food and Beverage</i>	<i>3 years</i>
	<i>Laparish Grier</i>		<i>Nursing</i>	<i>4 years</i>
	<i>Denena Davidson</i>		<i>Environmental Services</i>	<i>6 years</i>
	<i>Tabatha Johnson</i>		<i>Nursing</i>	<i>6 years</i>
	<i>Angela Barnes</i>		<i>Nursing</i>	<i>7 years</i>
	<i>Kathleen Church</i>		<i>Food and Beverage</i>	<i>9 years</i>
	<i>Robin Allen</i>		<i>Environmental Services</i>	<i>10 years</i>
	<i>Robert Cope</i>		<i>Plant Operations</i>	<i>11 years</i>
	<i>April King</i>		<i>Environmental Services</i>	<i>11 years</i>
	<i>Angela Martin</i>		<i>Nursing</i>	<i>17 years</i>

**WHITESTONE EMPLOYEE: RECOGNITION, RECRUITMENT, & RETAINMENT:****DATE(S): MEETING(S)/EVENT(S)****Weekly:** *New Hire and General Orientation*



## KEY PERFORMANCE INDICATORS – AUGUST 2023

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

YTD EXPPOR	Operational expense budgeted at 12,111,597 with actual of 11,355,924. A positive variance of 755,673 YTD. EXPPOR YTD budget at 7,186 with actual 6,937, a positive variance of \$249 or 3.5%.
YTD REVPOR	Operational revenue budgeted for 10,724,451 with actual at 10,451,669. A negative variance of (272,782). YTD REVPOR budget at 6,363 with actual of 6,384, a positive variance of \$21 or % variance of 0.3%. Health Services revenue off budget (342,989) due to renovation delays. REVPOR % variance of (6.7%). Due to delay in construction and budget error in MCD. Expect continued census improvement in HC.
IL MTD Occupancy	Average occupancy of 168.3 on budget of 166. Ended the month with 168 occupied and currently sit at 172, which is above budget. Began moving into expansion IL units on 5/30, increasing capacity to 213. Expansion move-ins expected to be slower than planned due to ongoing issues with construction.
YTD Net Sales IL	

HC MTD Occupancy	Average occupancy for the month at 64.8 budget at 68. Currently sit at 68 on a budget of 68, with a rehab census of 18. Final phase of renovation being inspected by DHSR in September. Once approved, will increase bed to capacity of 88.
YTD NOI	Actual of (904,255) on budget of (1,387,146), a positive variance of 482,891.

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

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

Days in AR	363,348 at 90 days outstanding or 29%, a negative variance to 15% goal of (173,310). Slight improvement over July of 2% and continued progress in over 90 since Feb. In the health center 359,736 in outstanding 90 day balance. Insurance at 185,244, MCR at 99,670, and Pvt 66,777. LCS Reliance continues supporting AR efforts and now billing since resignation in finance department. Expect continued improvement over next two months as MCR / INS claims continue to be refilled.
Memory Care MTD Occupancy	Residents were transitioned to long term care beds on 5/16, to allow for final phase of renovations. Once new AL opens, will be transitioning residents from IL to rebuild occupancy. MC Occupancy will remain red until AL building complete and approved for occupancy.
YTD Closings IL	Budget 78, actual 44 closings. Budget includes closings of new IL building but construction delays have slowed closings. Scheduled 9 closings in September, with only 2 budgeted, which will makeup ground. AL delays also contributing. Anticipate this to remain red/yellow until end of year due to the above.
YTD Move Ins IL	Budget of 66 versus actual of 46.

	Budget includes expansion move ins but construction delays have negatively impacted move ins. 9 scheduled move ins for September but will remain off budget YTD -11 at end of month. The impact of construction delays will be felt the remainder of the year.
YTD Net Sales IL	Budget 8 with actual net sales at 4. Higher number of cancellations YTD (x31) related to expansion. Sales team slowed by lack of available inventory with villas being fully occupied. AL/IL construction delays contributing. Improvement will be realized once AL approved for occupancy due to resident transfers, opening villas. The impact of construction delays will be felt the remainder of the year.



## COVID-19 TASKFORCE & UPDATE(S) – AUGUST 2023

Recently, the Food and Drug Administration, as well as the Centers for Disease Control and Prevention (CDC), have authorized new guidelines for the updated COVID-19 vaccines. The updated vaccines are being rolled out amid a late-summer uptick in Covid cases. Although, please keep in mind that the number of Covid hospitalizations are nowhere near what was seen this time last year.

According to the CDC, the new Covid shots, made by Pfizer and Moderna, target a subvariant of omicron, called XBB.1.5. More than 90% of the Covid viruses circulating now are closely related to that strain.

For the first time, the cost of Covid vaccines will not be covered by the federal government, though most insurance plans, both private and public, will cover them. The list price will top \$100 per shot.

WhiteStone is currently working with our pharmacy partners at Neil Medical to provide residents and staff with the opportunity to receive the latest vaccines here at the community.

## WHITESTONE LEADERSHIP TEAM: DIRECTOR'S REPORTS

DIRECTOR NAME -	DEPARTMENT -
Mrs. Tracy Armwood, SPHR	Director, Human Resources
Mr. Robert Reese	Director, Environmental Services

<b>DIRECTOR NAME -</b>	<b>DEPARTMENT -</b>
<i>Mr. Rick Hatch</i>	<i>Director, Plant Operations</i>
<i>Ms. Doris Nance</i>	<i>Director, Clinical Services</i>
<i>Mr. Josh Hillegass, LNHA</i>	<i>Health Services Administrator</i>
<i>Ms. Marie Dunn</i>	<i>Director, Marketing &amp; Sales</i>
<i>Ms. Jenna Grant</i>	<i>Director, Fraternal Friendship</i>
<i>Mr. Mark Lewis, LNHA</i>	<i>Executive Director</i>
<i>Mrs. Gina Prevost, LRT/CTRS</i>	<i>Director, Community Life Services</i>
<i>Mrs. Misty McAden</i>	<i>Director, Spiritual Services &amp; Chaplain</i>
<i>Ms. Nikki Stafford</i>	<i>Director, Finance</i>
<i>Mr. Jonathan Szarke</i>	<i>Director, Food &amp; Beverage</i>

## **I. WHITESTONE HEALTH CENTER ADMINISTRATION REPORT**

### **AUGUST 2023 OVERVIEW**

Phase 4 construction continues at the Care and Wellness Center. We're thankful to continue to see great progress in updating our 200 Neighborhood. During the month of August, we had many cosmetic changes completed, along with furniture installation. Please find photos below of the recent progress:



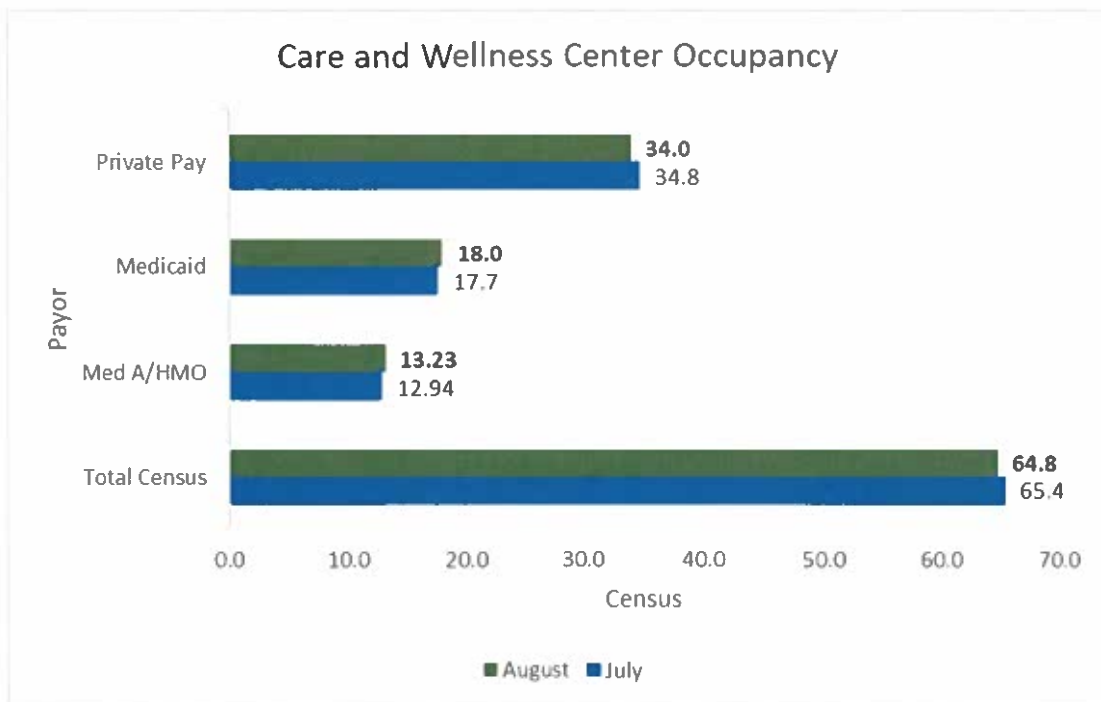
Brittany Brown, Admissions Coordinator, joined our team on August 3rd and has been a great addition to the Care and Wellness Center. Please find a short biography on Brittany below:

“Hello everyone, my name is Brittany Brown, I am excited to join WhiteStone as the Admissions Coordinator at the Care and Wellness Center. I am a Randolph County Native; It is where I attended High School and received my associate degree. I enjoy spending time with family and friends. I have a daughter and 2 fur babies Millie and Macy, who we enjoy taking on our outdoor adventures across North and South Carolina’s Coast.”



## Census Updates

For the month of August, the Care and Wellness Center continues to maintain strong occupancy, averaging 88% occupancy. Month over month, we did not see much change in our Medicare A / HMO census nor in our Private Pay census. While our average census for month below our budget of 68 total census, we made a strong push at the end of the month and ended on 8/31 with a total census of 68 and a Medicare A / HMO census of 18. With our new Admissions Coordinator in place, I hope to see this heightened census continue into September.



## Clinical Updates

Following our Clinical Review completed by our Life Care Services Clinical Specialist, Jon Back, our Clinical Team continues to work on plans related to five areas: Wounds, our fall prevention program, psychotropic medications, comprehensive care plans, and bedrails.

During the month of August, we had a Mock Survey completed by Cindy Bennett, Senior Clinical Specialist. From her Survey, Cindy noted several areas for the team at the Care and Wellness Center to address prior to our upcoming annual survey to ensure that we are readily prepared. Cindy did have several positive things to share regarding her visit such as the overall cleanliness of the community, that Residents stated they were always treated with respect, how good the food was, and the positive comments that she received during her visit from Residents and Family Members. We are thankful for Cindy taking the time to continue to prepare our team at the Care and Wellness Center for our Annual Survey.

## II. WHITESTONE HUMAN RESOURCES REPORT

### TURNOVER:

24.92% turnover YTD 2023. Compared to 36.26% through August 2022.

### VERTIME:

715.47 of OT for August. Compared to 896.88 hrs. for August 2022. A decrease of -181.41 hrs. on the month and total YTD increase in overtime from last year by 1960.24 hrs.

### WORKERS COMPENSATION:

We have one work claim that we just filed 8/4/23. An employee working in the CWC kitchen hit her head on the steamer door which was open. This caused a contusion on the forehead. Employee continues to be out of work.

### EEOC & LEGAL UPDATE(S):

On 8/3/23 we received an EEOC charge of discrimination based on race filed by a current CNA. The complaint resulted from an incident with another employee back in March in which the complainant accused them of stealing a room spray from her bag. The incident was investigated and was unsubstantiated. As of this report, there is no response due the EEOC at this time.

**RECRUITMENT UPDATE(S):** We are currently recruiting for:

MONTHLY TURNOVER		
	2023	2022
Jan	1.65%	5.61%
Feb	0.41%	4.88%
Mar	4.68%	3.60%
Apr	2.16%	3.65%
May	2.62%	4.63%
Jun	2.04%	1.78%
Jul	4.35%	3.54%
Aug	5.77%	1.71%
Sep	%	%
Oct	%	%
Nov	%	%
Dec	%	%
<b>TOTAL</b>	<b>24.92%</b>	<b>36.26%</b>

Job Title	# of Openings	New Candidate Pipeline	Attempting to Contact	Interviews Scheduled	Offers Pending
Charge Nurse - 1st shift Fulltime	3	8	30	4	
Charge Nurse - 1st shift Part time	1	5	29	1	1
Charge Nurse - 2nd shift Fulltime	3	8	30	4	
CNA - 1st shift Fulltime	3	66	58	8	1
CNA - 2nd shift Part time	4	66	58	8	
Nurse Supervisor - 3rd shift Full time	1	3	3		
RN Weekend Supervisor	1	6	6	1	
Health and Wellness Nurse - Part Time	1	1	2		
Accounting Assistant	1	2	3	1	
Administrative Assistant	1	63	39	2	
AL Nurse 2nd shift Fulltime	1				
total openings:	20			Total Offers:	2
	Openings after Offers:		18		

### Recruiting

WhiteStone hosted an onsite job fair Monday, August 28th with great success. We had 36 candidates show up and made 19 offers of employment!! We have a GTCC Job Fair, Wednesday Sept. 6th and upcoming Job fairs at UNCG, WSSU, HPU and ECPI all in September.

### Retention

We are focusing a priority on department onboarding and job specific training. We are reviewing department training to assure timely and adequate training, mentor assignments, and new hire support to ensure a successful onboarding.

### Recommendations and/or Other Information

We have submitted recommendations for salary considerations with a focus on nursing staff, maintenance and raising our minimum to \$15/hr.

## III. WHITESTONE MARKETING & SALES REPORT

Monthly Marketing Report				
August 2023				
Current Occupancy:	168	79%		
Sold Occupancy:	189	89%		
Expansion Sales:	52	78%		
Available Units:	<u>Villa</u>	<u>Cottage</u>	<u>IL Apts</u>	<u>Res Apts</u>



	1	1	20	2	
<b>Explanation:</b>	<u>Villa</u>	<u>Cottage</u>	<u>IL Apts</u>	<u>Res Apts</u>	
	5 YRC	2D	219,221,416,411 416,228,230,231 233,234,330,426 430,431,432,434 437,532,219,324	343 Ben 146 Ben	
<b>Sales:</b>	6	312,114,421,261,423,6G		<b>Exp Cancel:</b>	3
<b>Transfers:</b>	1	324 to 326			
<b>Move In: (Aug)</b>	13		<b>Upcoming MI: (6)</b>	Expansion plus	
<b>Upcoming MO:</b>	3		<u>Reason</u>	<u>Est. M/O</u>	
	IL 321		HLOC	9/22	
	IL 521		Expired	9/4	
	5 YRC			8/31	
<b>Upcoming Events:</b>	9/19	Resident Panel Prospect Event			
	9/20	New Resident Orientation			
<b>Department Highlights:</b>	Expansion Move-Ins Focus on setting a quarterly whole home networking event Begin planning for CWC + IL Marketing Collab for Business Dev partners External Business Development Opportunities				
<b>Recruitment Update:</b>	Currently Full Staff				

#### IV. WHITESTONE PLANT OPERATIONS REPORT

- Attended multiple equipment in services with GC and subcontractors on ALMC.
- Install accessory items in MC.
- Secure pricing on Pressure washing and Paining IL South.
- Prepare for open house ALMC.
- Met with electrical engineers to strategize plan for CWC generator with intentions of upsizing for future needs in addition, review electrical loads for IL South.
- Secured bids to continue with Gay terrace life safety plan and permitting.

- Approved proposal to continue work on coolers. Sprinkler company had to withdraw from project due to staffing. Design group for Gay Terrace will assume the responsibility of drawings for walk-ins.
- Worked with vendors to secure budget pricing based on additional services for expansion.
- Continue to work with marketing to transition apartment turn overs to Ops.
- Working with Duke Energy on site lighting and rebates.
- Working with EC for exterior lighting.
- Acquired new communication devices for ALMC.
- Commissioned new trash chute equipment.
- Secured additional waste service for ALMC.
- Completed Badge access for sliding gate, working on auto EZ pass for swing gate.

## V. WHITESTONE OUTREACH REPORT: THE FOUNDATION

### AUGUST 2023 OVERVIEW

#### ASSISTANCE:

- *Outreach Totals of \$10,981 for a total of (10) members:*
  - (9) long term members
  - (1) short term members (Emergency)
- *WhiteStone residents receiving assistance (19)*
  - (19) independent living
  - (0) memory care / assisted living

#### NEW REFERRALS: SCHOLARSHIP & OUTREACH:

*(13) potential referrals are being processed by our Outreach Coordinator*

- (5) are for scholarships (Move-In Assistance)
- (5) are for Long Term Assistance
- (3) for Short-Term / Emergency Assistance
- (0) may fall into Outreach or Scholarship in time

If you know of a member needing assistance, please contact our Director of Fraternal Friendship at [jgrant@meshhome.org](mailto:jgrant@meshhome.org) or by calling (336)601-5593.

## VI. WHITESTONE FINANCE REPORT

Ongoing - The 401k audit is in the final stages of completion. The additional contributions for prior year compliance testing added to some of the work for the 2022 audit as well.

Ongoing -The 990 filing.

Ongoing -- There is still one year that needs to be corrected as it relates to the 401k Compliance testing situation and that is 2020. This will have to be corrected by 12/31/2023. One touch base call with all the communities has been held and will continue to be done throughout the year.

Ongoing -Accounts Receivable is still a priority for over 90 days.

Ongoing – 401k filing penalty – the letter regarding the automatic extension has been sent to the IRS. Communications with CLA regarding the appropriate time to follow up are ongoing and when the appropriate amount of time has passed a follow up will be done.

Wanda Priddy's last day was 8/15. WhiteStone has engaged LCS Reliance to work with the community on Health Center billing for MedA, MedB, and Managed Care. Sharon is our billing specialist and was already familiar with WhiteStone as she assisted with AR work. Billing that is being submitted in September for August services will be the first billing LCS Reliance will be doing.

Archana Patel has been promoted to Executive Assistant to Mark. Interviews for her position, as well as an accounting position are taking place.

Expansion move ins are still busy and expansion entrance fees and deposits are still being tracked as closely as possible for the highest level of accuracy and being transferred to BNY.

The opening of the ALMC building and the transitioning of staff has created some IT projects that are being navigated as quickly as they can.

Employee Retention Credit (ERC) numbers have been submitted to CLA for review and conversations regarding more detail for some numbers are being had. As a reminder this can be a lengthy process and one that must be done carefully. Any updates will be sent but this will not happen quickly as time to review and ensure accuracy is required. As another reminder this is not guaranteed but an analysis of the numbers are being done thoroughly to determine if WhiteStone qualifies.

Budget season has started. The goal is to have the initial draft complete by early October, with minimal changes after that.

## VII. WHITESTONE FOOD & BEVERAGE

### Assisted Living Staffing

We are much closer to being staffed for the AL, with several new Dietary Aides as well as a new Cook on staff. We plan on shifting our CWC to AL during meal periods during the initial start up to best utilize our current level of staffing and make the process manageable.

### Independent Living A La Carte Menu

Our new menu release has been successful, with residents especially liking the bone in Frenched pork chop and rack of lamb.

### FullCount Platform Features

We are in the process of adding several additional features to FullCount, our point of sale platform, to include Reservations, Online Ordering and a Resident Portal. This will allow residents to book reservations through FullCount, place orders online for dining in to reduce wait times, and the Resident Portal so they can see all of their billing information through their app.

### Dining Room Host

We are adding an evening host position to our roster and have hired a candidate by the name of Anita Bennett for the role. She's expected to be in orientation on 9/7. This will allow us to better manage the flow of guests in the dining room during peak dinner service times with the influx of new residents.

### Certified Dietary Manager

We've hired a strong candidate by the name of Bradley Spake for the open role. This position will directly oversee the Care and Wellness Center kitchen and provide oversight of assisted living dining.

## VIII. WHITESTONE COMMUNITY LIFE SERVICES REPORT

### CLS STAFFING UPDATE(S): Stable with current employees

- Andrew Howard, Jr. was in orientation on 8/17 and his first full day was on Friday 8/18 for Independent Living. He is a wonderful addition to our department!
- Hollis Sherman will be in orientation this Thursday and her first full day will be Friday, September 8th. We are looking forward to having her with us.
- 2 full time in Assisting Living and 1 part time (not hiring yet for these positions – is what I have open)

### CLS PROJECT UPDATE(S):

Tracking resident volunteer(s) and hours to enhance program and opportunities.

Total – 245 hours and 15 minutes =10.219 days of volunteer work in the month of August.

### CLS Independent Living Programming:

Total Number of Activities: 65	Average Participation: 15.9 (16) Participation Percentage: 95.7%
Total Number of Sessions: 173	*(66/69 Activities had participants) Resident Percentage: 82.3%
Total Number of Cancellations: 3	*Participated in at least one (1) activity

Total Participation: 2754

Total Number of Check-Ins: 208\*

Changes since July:

- Total Number of Activities decreased by 3 (4.41% Decrease)
- Total Number of Sessions increased by 3 (1.76% Increase)
- Total Participation increased by 491 (21.7% Increase)
- Average Participation increased by 2.6 (10.55% Increase)
  - o (Note: Average = Total Participation/Total Number of Sessions)
- Participation Percentage increased by .1%
- Resident Participation increased by 26.62%
- Total Number of Check-Ins increased by 47 (29.19% increase)
- 8 Sessions of Intergenerational Activities (Chess with Students)

#### Other Items:

- Top of my priority list is to get touchtown installed in AL so it will be live when residents move in (hoping)
- 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 and in to Point Click Care as we get them.
- Working with Mandy, Lora, and Allison to develop a program for low functioning residents in the care and wellness center.
- Overseeing that Mandy, Lora, and Allison are maintaining their schedule to keep residents in living rooms active in between scheduled activities.
- Continuing to work on Chit Chat and Care Center Connections – due once a month.
- Continue to work on the next month's calendar preparation.

## IX. WHITESTONE CHAPLAIN & SPIRITUAL SERVICES REPORT

Sunday services – 4 services

Funerals officiated - 0

Recorded Encounters (not counting group activities, some brief encounters or phone calls)

CWC – 40+ (some with family present)

IL- 45 + (with 2 hospital visits)

Employee – 1

Weekly Bible studies/worship

CWC/Wisteria combined 5 (with singing)

IL – 5

Meetings: CWC daily report, “traffic” meeting, Spiritual Support Committee, Auxiliary committee, Resident Council, town hall, Advisory Committee, Board meeting

Miscellaneous: attended IL coffees and other activities as able, AL Grand opening, Assisted with Resident Orientation, card ministry, prepared articles for newsletters, provided grief support to families, lunch/dinner walk throughs to greet residents, phone calls

Working on the following: planning a “Difficult Conversations” panel for Tuesday evening Sept 26th, researching “pet blessing” for October, planning support for new ALF, Still working with Jewish population – Rabbi was not able to attend in Aug., working on obtaining a small area for a meditation room open to all faiths



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## WHITESTONE EXPANSION REPORT(S)

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### Updates/Accomplishments – August 2023

- **Site Work**
  - All inspections completed for City of Greensboro
  - Landscaping & Irrigation complete except for punch/warranty items
  - Dead landscaping being identified for fall replacement
  - Irrigation work in progress to repair damaged lines by Duke Energy during boring for light post installation
- **CWC – Care and Wellness Center:**
  - Phase 4: Final Phase - Renovation started May 22, 2023
    - Inspections have been completed for the City of Greensboro
    - Final finishes in progress
    - CERTIFICATE OF OCCUPANCY RECEIVED 8-29-23
  - Pool Renovation:
    - Pool is complete and Temporary Certificate of Occupancy has been obtained.
    - Department of Health has approved for use by independent living residents.
    - Final approval will be with DHSR inspection. DHSR inspection was completed on October 11. Due to code requirements, we will not be able to allow occupancy of Care and Wellness residents until post completion of the Assisted Living
    - Added lighting and revisions requested by DHSR have been completed
    - Documentation will be submitted once inspections are signed off for the Assisted Living/Memory Care (AL/MC) project
- **IL – Independent Living:**
  - Temporary Certificate of Occupancy received 5-22-23
  - CERTIFICATE OF OCCUPANCY RECEIVED 8-28-23
  - Final punch work being completed
  - Apartments are being completed based on move in schedule

- Current schedule indicates all apartments to be completed middle of September
- Resident move-ins in progress, 38 closed
- **AL – Assisted Living:**
  - Stocking permit achieved 5-19-22, allows for furniture installation
  - Temporary Certificate of Occupancy received 6-30-23
  - Completing noted items during inspection, Certificate of Occupancy from The City of Greensboro, final sign off from Sanitation (Department of Health)
  - CERTIFICATE OF OCCUPANCY RECEIVED 8-28-23
  - Final documents have been submitted to DHSR Architectural/Mechanical and pending approval letter

## **Next Steps/Milestones**

### **Assisted Living / Memory Care:**

- Obtain DSHR Life safety approval for AL/MC
- Obtain DSHR Licensure approval to occupy AL/MC

### **Care and Wellness:**

- Obtain DSHR Life Safety approval for CWC Phase IV
  - In process of scheduling now CO is obtained
- Obtain Department of Health Approval – City of Greensboro (scheduled)
- Obtain DSHR Licensure approval to occupy

### **Therapy Pool:**

- Obtain DSHR approval to allow Care Center residents to utilize the pool, this will be finalized when construction is completed for the Assisted Living
  - Will submit information once DSHR Life Safety is obtained for AL/MC. Will pursue as part of the DSHR inspection associated with Phase IV

### **Independent Living:**

- Final punch nearing completion

### **CONSTRUCTION FOOTAGE LINK:**

[https://www.youtube.com/playlist?list=PL7tINPs8fkXPuy7\\_wdXlm1vKPxy6-iZTf](https://www.youtube.com/playlist?list=PL7tINPs8fkXPuy7_wdXlm1vKPxy6-iZTf)





# September 2023

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

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*WhiteStone*  
A MASONIC & EASTERN STAR  
COMMUNITY  EST. 1912  
Founded on fellowship. Inspired by you.

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

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# VISIBILITY SEPTEMBER 2023

## 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 Friday

## WHITESTONE FRATERNAL VISIBILITY

DATE(S):	MEETING(S)/EVENT(S)
September 5 <sup>th</sup>	Masonic Luncheon at WhiteStone
September 9 <sup>th</sup>	MESH Lodge #771
September 28 <sup>th</sup> and 29 <sup>th</sup>	Grand Master’s Dinner / Annual Communication

## WHITESTONE RESIDENTS: COMMITTEES, SERVICES & SUPPORT

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
As Needed:	WhiteStone COVID Task Force
Monthly:	WhiteStone Resident Committee: Marketing [1 <sup>st</sup> Wednesday]
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: Environmental Services [Building & Grounds] 2 <sup>nd</sup> Monday
Monthly:	WhiteStone Resident Committee: Campus Care Alliance [3 <sup>rd</sup> Tuesday]
Monthly:	WhiteStone CWC QAPI [3 <sup>rd</sup> Thursday] (Construction Townhall with F.L. Blum)

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

Monthly: *WhiteStone Resident Committee: Auxiliary [3<sup>rd</sup> Wednesday]*

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

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

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

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

September 11<sup>th</sup> *Jacob Elliott, Director of Operations Management TEAMS Update*

September 13<sup>th</sup> *Kristal Riley, CPS Site Visit*

September 18<sup>th</sup> – 21<sup>st</sup> *Site Visit with Jon Back, LCS Clinical Specialist*

**WHITESTONE EXPANSION: PROJECT(S) & REPORTING**

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

Weekly: *WhiteStone Expansion – OAC Weekly Mtg.*

Weekly *Construction Update with Long Range Planning Executive Committee*

September 8<sup>th</sup> *Department of Health Inspection of Phase 4*

September 12<sup>th</sup> *DHSR Construction Section Inspection of Phase 4*

**WHITESTONE TECHNOLOGY INFRASTRUCTURE: PROJECT(S) & REPORTING**

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

**WHITESTONE NEW RESIDENT: PROSPECTING EVENT(S):**

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

September 19<sup>th</sup> Prospect Event – Resident Panel

September 20<sup>th</sup> New Resident Orientation

**WHITESTONE EMPLOYEE: AUGUST ANNIVERSARIES**

SERVICE DATE:	EMPLOYEE NAME:	TITLE:	DEPARTMENT	YEARS OF SERVICE:
	Dawud Faucett		Food and Beverage	1 year
	Sherica Hargrove-Thomas		Nursing	1 year
	Ashli Harrison		Nursing	1 year
	Ricky Moore		Plant Operations	1 year
	Larkin Pena		Community Life Services	1 year
	Kimberly Price		Nursing	1 year
	David Wells		Security	1 year
	Reneeta Whitsett		Food and Beverage	1 year
	Latoya Bittle		Nursing	4 years
	Marisol Alvarez		Health and Wellness	5 years
	Jenna Grant		Fraternal Friendship	5 years
	Patricia Bason		Environmental Services	6 years
	Scott Oliver		Community Life Services	6 years
	Lore Alston		Nursing	8 years
	Sheila McQueen-Woods		Health and Wellness	15 years
	Jami Routh		Community Life Services	21 years
	Yaa Agyeiwaa		Environmental Services	23 years

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

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

**Weekly:** *New Hire and General Orientation*

*September 28<sup>th</sup> Employee Recognition at Resident Council*



**KEY PERFORMANCE INDICATORS – SEPTEMBER 2023**

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

YTD EXPPOR	Operational expense budgeted at 13,847,731 with actual of 12,790,772. A positive variance of 1,056,958 YTD. EXPPOR YTD budget at 7,210 with actual 6,793, a positive variance of \$417 or 5.8%.
IL MTD Occupancy	Average occupancy of 173.8 on budget of 161. Ended the month with 173 occupied and currently sit at 176, which is above budget. Began moving into expansion IL units on 5/30, increasing capacity to 213. Expansion move-ins expected to be slower than planned due to ongoing issues with construction.
HC MTD Occupancy	Average occupancy for the month at 68.3 budget at 68. Currently sit at 68.8 on a budget of 73, with a rehab census of 19. Due to delay in phase 4 approval, total capacity remains 74. Final phase of renovation being inspected by DHSR in September. Once approved, will increase bed to capacity of 86.
YTD NOI	Actual of (1,018,349) on budget of (1,492,224), a positive variance of 473,875.

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

YTD REVPOR	with actual at 11,722,424. A negative variance of (583,083). YTD REVPOR budget at 6,433 with actual of 6,253, a negative variance of (\$181) or % variance of 2.8%. Health Center revenue off budget (481,206) due to renovation delays. REVPOR % variance of (8.2%). Due to delay in construction and budget error in MCD line.
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Expect continued census improvement in HC and occupancy of 200 neighborhood during 4th quarter.

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

Days in AR	396,973 at 90 days outstanding or 32%, a negative variance to 15% goal of (209,381). In the health center 388,464 in outstanding 90 day balance. Insurance at 139,464, MCR at 77,221, and Pvt 129,856. PVT Pay increase due to billing of co-insurance of old claims. LCS Reliance continues supporting AR efforts and now billing since resignation in finance department. Expect continued improvement over next two months as MCR / INS claims continue to be refiled.
Memory Care MTD Occupancy	Residents were transitioned to long term care beds on 5/16, to allow for final phase of renovations. Once new AL opens, will be transitioning residents from IL to rebuild occupancy. MC Occupancy will remain red until AL building complete and approved for occupancy.
YTD Closings IL	Budget 80, actual 48 closings. Budget includes closings of new IL building but construction delays have slowed closings. Scheduled 5 closings in October, with only 2 budgeted, which will makeup ground. AL delays also contributing. Anticipate this to remain red/yellow until end of year due to the above.
YTD Move Ins IL	Budget of 68 versus actual of 53. Budget includes expansion move ins but construction delays have negatively impacted move ins. 5 scheduled move ins for October but will remain off budget YTD -12 at end of month. The impact of construction delays will be felt the remainder of the year causing the dashboard light to remain red.
YTD Net Sales IL	Budget 9 with actual net sales at 7. Higher number of cancellations YTD (x33) related to expansion. Sales team slowed by lack of available inventory with villas being fully occupied. AL/IL construction delays contributing. Improvement will be realized once AL approved for occupancy due to resident transfers, opening villas. Now anticipated sometime in November. The impact of construction delays will be felt the remainder of the year.



## COVID-19 TASKFORCE & UPDATE(S) – SEPTEMBER 2023

Recently, the Food and Drug Administration, as well as the Centers for Disease Control and Prevention (CDC), have authorized new guidelines for the updated COVID-19 vaccines. The updated vaccines are being rolled out amid a late-summer uptick in Covid cases. Although, please keep in mind that the number of Covid hospitalizations are nowhere near what was seen this time last year.

According to the CDC, the new Covid shots, made by Pfizer and Moderna, target a subvariant of omicron, called XBB.1.5. More than 90% of the Covid viruses circulating now are closely related to that strain.

For the first time, the cost of Covid vaccines will not be covered by the federal government, though most insurance plans, both private and public, will cover them. The list price will top \$100 per shot.

WhiteStone is scheduled for a vaccine clinic on Friday October 6<sup>th</sup>.

## WHITESTONE LEADERSHIP TEAM: DIRECTOR'S REPORTS

<b>DIRECTOR NAME -</b>	<b>DEPARTMENT -</b>
<i>Mrs. Tracy Armwood, SPHR</i>	<i>Director, Human Resources</i>
<i>Mr. Robert Reese</i>	<i>Director, Environmental Services</i>
<i>Mr. Rick Hatch</i>	<i>Director, Plant Operations</i>
<i>Ms. Doris Nance</i>	<i>Director, Clinical Services</i>
<i>Mr. Josh Hillegass, LNHA</i>	<i>Health Services Administrator</i>
<i>Ms. Marie Dunn</i>	<i>Director, Marketing &amp; Sales</i>
<i>Ms. Jenna Grant</i>	<i>Director, Fraternal Friendship</i>
<i>Mr. Mark Lewis, LNHA</i>	<i>Executive Director</i>
<i>Mrs. Gina Prevost, LRT/CTRS</i>	<i>Director, Community Life Services</i>
<i>Mrs. Misty McAden</i>	<i>Director, Spiritual Services &amp; Chaplain</i>
<i>Ms. Nikki Stafford</i>	<i>Director, Finance</i>
<i>Mr. Jonathan Szarke</i>	<i>Director, Food &amp; Beverage</i>



## I. WHITESTONE HEALTH CENTER ADMINISTRATION REPORT

### SEPTEMBER 2023 OVERVIEW

During the month of September, we made strides in the completion of phase four of construction in the Care and Wellness Center. This final phase will complete our construction and renovation of the Care and Wellness Center by opening our 200 Neighborhood. This month, we had inspections completed by the local Department of Health and the Department of Health Service Regulation Architectural and Engineering Division. We have successfully completed both inspections, and we continue to communicate with licensure to maintain our pace to completion.

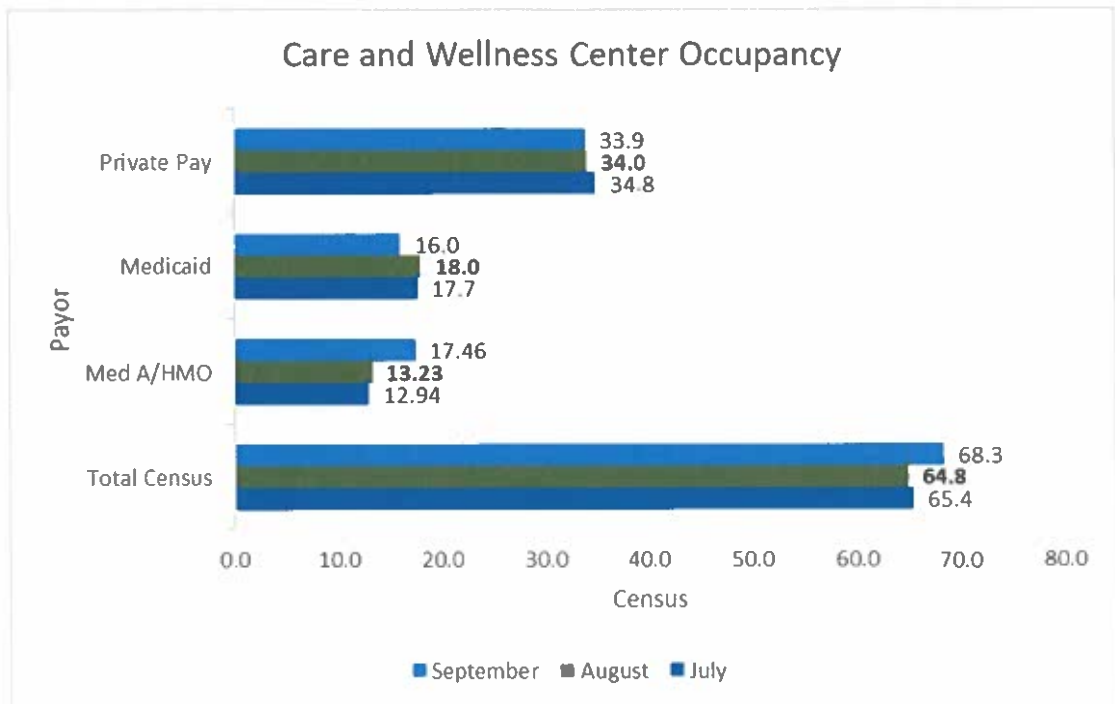
Much of our month in September was spent in recognition of the hard work and dedication our Staff bring to WhiteStone every day. From completing day-to-day recognition, to hosting staff appreciation events, and campaigns to reward the good that they do, we're thankful to the Staff that care so much for our Residents, Families, and each other.

In September, we started a campaign surrounding our call light response time in the Care and Wellness Center. Our focus is to track and trend our call light response time, and those days that average a response time of less than five minutes are added to our counter which is displayed in the breakroom. Upon completion of thirty days below five minutes, we have a staff appreciation event planned. Our team at the Care and Wellness Center plans to continue these campaigns to both drive process and performance improvement, but to also involve and reward the Staff for their contributions to patient care and outcomes.

### Census Updates

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We had a strong month for the Census in September. We met our budgeted Census for the Care and Wellness Center at an average of 68 for the month. Additionally, we saw strong growth in our Managed Care and Medicare Census from an average of 13 in August to an average of 17 in September. We continue to grow our Short-Term Rehabilitation program at the Care and Wellness Center through our local referral sources, and I see this trend continuing as we continue to add additional capacity to the Care and Wellness Center.



## Clinical Updates

In September, our Life Care Services Clinical Specialist, Jon Back, visited our community for the second time. During Jon's visit, he completed an overall inspection of our Care and Wellness Center, along with continued follow-up on areas of opportunity he noted during his first visit. During his visit, Jon had positive things to say regarding the Staff, their interactions with Residents and Family Members, and the care being provided. Jon's report showed an improvement in our score, which reflects the hard work our team has been dedicating at the Care and Wellness Center. Our Clinical Leadership Team maintains a strong focus on two programs, our fall prevention program and our antipsychotic medications.

Please find a summary of his report below:



# Clinical Review

Form  
Reset

COMMUNITY		CLINICAL SPECIALIST	
<b>Whitestone</b>		<b>Jon Back RN</b>	
REVIEW COMPLETION DATE	Overall Score	<input checked="" type="checkbox"/> Insite Visit	<input type="checkbox"/> Virtual
September 21, 2023	86%	Heartfelt Connection Certification	<input checked="" type="checkbox"/> YES
REVIEW COMPONENTS	Individual Component	Budgeted Cases	Actual Cases
		64	70
		Comments	
Resident Rights	82%		
Free from Abuse, Neglect and Exploitation	91%		
Quality of Life/Activities of Daily Living	91%		
Assessment & Comprehensive Care Plans	55%		
Life Enrichment and Heartfelt Connections	100%		
Social Services/Behavior Management	55%		
Bowel and Bladder Management	100%		
Event Management	45%		
Nutrition/Hydration Management & Dialysis	73%		
Pain Management	91%		
Skin and Wound Management	91%		
Discharge Planning	100%		
Daily Clinical Meeting	91%		
Weekly Risk Meeting	100%		
Physician and Nursing Services	100%		
Medication/Order Management	91%		
Food/Beverage and Dining Services	82%		
Infection Prevention and Control	91%		
Physical Environment	100%		

## II. WHITESTONE HUMAN RESOURCES REPORT

### TURNOVER:

27.86% turnover YTD 2023. Compared to 31.4% through September 2022.

### OVERTIME:

809 hrs of OT for September. Compared to 706.49 hrs for September 2022. A increase of 102.51 hrs on the month and total YTD increase in overtime from last year by 2062.74 hrs.

### WORKERS COMPENSATION:

We have one work claim that we just filed 8/4/23. An employee working in the CWC kitchen hit her head on the steamer door which was open. This caused a contusion on the forehead. Employee continues to be off work.

### EEOC & LEGAL UPDATE(S):

On 8/3/23 we received an EEOC charge of discrimination based on race filed by a current CNA. There had been no requested response required from the EEOC due to pending documentation from the claimant. On 9/30/23 we received a "Case Closed" response from the EEOC related to this case. The case was closed and determination and right to sue letter issued to the claimant.

Unfortunately, on 9/23/23, we received another EEOC charge base on The Americans with Disabilities Act of 1990 (ADA), The Age Discrimination in Employment Act of 1967 (ADEA). The circumstances of the alleged discrimination are based on Age, Disability, Retaliation, and involve issues of Reasonable Accommodation, Terms/Conditions, Discharge that are alleged to have occurred on or about 03/28/2023. This is in relation to a Clinical Care Coordinator who refused duties and stated due to a disability, however, employee could not provide documentation. She did however, establish new restrictions that were more restricted than her previous claimed disability with no timeline of return to work. She was not eligible for FMLA therefore we chose to not hold her position.

MONTHLY TURNOVER		
	2023	2022
Jan	1.65%	5.61%
Feb	0.41%	4.88%
Mar	4.68%	3.60%
Apr	2.16%	3.65%
May	2.62%	4.63%
Jun	2.04%	1.78%
Jul	4.35%	3.54%
Aug	5.77%	1.71%
Sep	2.94%	2.00%
Oct	%	%
Nov	%	%
Dec	%	%
<b>TOTAL</b>	<b>27.86%</b>	<b>36.26%</b>

**RECRUITMENT UPDATE(S):** We are currently recruiting for:

Reported on: 10/2/23					
<b>IMMEDIATE OPENINGS</b>					
Job Title	# of Openings	New Candidate Pipeline	Attempting to Contact	Interviews Scheduled	Offers Pending
Charge Nurse - 1st shift Part time	1		16	2	1
Charge Nurse - 2nd shift Fulltime	3		4	1	
Charge Nurse - 2nd shift Part time	2		16	2	1
Charge Nurse - 3rd shift Fulltime	3		4	1	1
CNA - 1st shift Fulltime	1	1	57	13	1
CNA - 2nd shift Fulltime	2	1	57	13	
CNA - 2nd shift Part time	1	1	57	13	
Nurse Supervisor - 3rd shift Full time	1				
RN Weekend Supervisor	1	2		1	1
Health and Wellness Nurse - Part Time	1	2	3	1	1
Maintenance - Fulltime	2	2	3	2	
Director of Plant Operations	1	3	6		
Custodian - Fulltime	1	8	4		
Security PT	1	11	6	1	1
total openings:	21			Total Offers:	7
	Openings after Offers:		14		

**Recruiting**

HR has spent the majority of the year on recruiting efforts. To summarize these efforts, I offer the following analytics:

- September only: 436 New Candidates; 77 Scheduled interviews; 32 offers with 29 hires
- 2023 YTD results: 2,967 new candidates; 614 interviews; 223 offers with 174 hires
- We have been participating in fall college career fairs with one more on our schedule at ECPI 10/18.

**Retention**

We continue to focus on new and ongoing retention efforts. We will be setting up a food truck this month.

**Recommendations and/or Other Information**

We have submitted recommendations for salary considerations with a focus on nursing staff, maintenance and raising our minimum to \$15/hr.

### III. WHITESTONE MARKETING & SALES REPORT

#### Monthly Marketing Report August 2023

<b>Current Occupancy:</b>	172 / 213	81%	Budget: 178		
<b>Sold Occupancy:</b>	189	89%			
<b>Expansion Sales:</b>	54	81%			
<b>Available Units:</b>	<u>Villa</u>	<u>Cottage</u>	<u>IL Apts</u>	<u>Res Apts</u>	
	0	1	21	3	
<b>Explanation:</b>	<u>Villa</u>	<u>Cottage</u>	<u>IL Apts</u>	<u>Res Apts</u>	
		2D	219, 221, 318	343 Benn	
			321, 411, 416, 521	146 benn	
			110, 228, 233, 234	144 Benn	
			327, 330, 332		
			426, 430, 431		
			432, 434, 437, 532		
			324		
<b>Sales:</b>	4	SYRC, 230, 329, 437	Cancel	1	110
<b>Move In: (August)</b>	5		<b>Upcoming MI:</b>	expansion list +	
				IL 322	IL 312
				905 FMD	5 YRC
				IL 421	6G Frat
<b>Transfers:</b>	2	144 Benn to 308 Linville 318 to 427			
<b>MO (Sept):</b>	1	321 (HLOC)			
<b>Upcoming MO:</b>			<u>reason</u>	<u>Est MO</u>	
<b>Upcoming Events:</b>	10/19/2023	Brad Breeding			
	10/25/2023	New Resident Orientation			
<b>Department Highlights:</b>	Focus on setting a quarterly whole home networking event				
	Begin planning for CWC + IL Marketing Collab for Business Dev partners				
	Participate in external business development opportunities				

## IV. WHITESTONE PLANT / ENVIRONMENTAL SERVICES REPORT

### Plant Operations

- September was a busy month for our exterminators. Erlich spent additional hours controlling the mosquito population and rodent issue. Elrich is managing the situation by checking bait stations and fogging procedures.
- Operations had several vacant units to turn as a result of the expansion, Ops worked closely with paint contractors and floor covering contractors to get these apartments ready to show.
- Operations continues to work with our security and access control contractor, MSI, to complete video surveillance and communications for the new ALMC.
- Began updating power point presentation for new resident orientation.
- Collaborated with CWC Administrator and DON on disaster plan for ALMC.
- Updated the SARA escalation Call list.
- Operations coordinated with GC to complete tasks in CWC Phase 4 for final inspections with health department.
- Attended EVS committee meeting with grounds contractor, residents and other staff where we had a round table discussion regarding weed killers. Specifically, stop using "round up" and move to an organic product. Brightview, our landscape contractor, is researching alternate products.
- Commissioned local grading contractor to cut drainage swale behind fence line at Gay Terrace lot to stop water infiltration issue at Villas on Scottish Rite Court.
- Made a presentation at Women's coffee to explain in detail what the operations department really does. It was fun.
- Continue to work with design professionals, "Steele Group" on Gay terrace for Life Safety Plan Appendix "B" in order to move forward with permitting. Operations will also work with the Steele Group to assist with plans and plan submission to COG for the walk-in coolers.
- Curtis Power Solutions was on site to assess our current backup generator system at CWC. CPS will prepare a quote for a suitable replacement. Due to the magnitude of this project, operations is securing two quotes. Carolina Cat is the other contractor who will quote the project.
- Ops worked with Director of Finance on budget.

### Environmental Services

#### Last Month's Activities:

- Conducted several in-services with staff.
  - A. No fault attendance policy recap
  - B. Always Staying survey readiness (**lock carts r.a.c.e p.a.s.s.**)
  - C. Creating interim team leader positions.
  - D. Parking behind CWC front parking is for Family & Visitors.

- E. One Team One message
- F. Taking unauthorized breaks & extended lunches.
- G. Providing great customer service to the community.

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

- Farewell luncheon for Ms. Darlene luncheon after serving the community for 43 years.
- Created a uniform committee.
- Celebrated housekeeping week. (Staff was excited about having something for the entire week.
- Created an activities committee with staff leading the way.
- Morning & Coffee donut huddles.

**Plans for the next Month**

- Continue working with staff updating on & off schedules, proper cleaning techniques.
- Pending tasks that's extremely important getting 200 hall and the A.L. building fully functional. (keeping track on back-order items)
- Ordering items for A.L. & 200 hall.
- Hiring staff for the 200 Hall & A.L. building & laundry staff.

**Issues and Concerns**

- Hiring proper staff for our community (Housekeeping & laundry staff)
- Staying on top of back-order supplies for the 200 hall & A.L.

**V. WHITESTONE OUTREACH REPORT: THE FOUNDATION**

**SEPTEMBER 2023 OVERVIEW**

**ASSISTANCE:**

- *Outreach Totals of \$9,842.40 for a total of (8) members:*
  - (8) long term members
  - (0) short term members (Emergency)
- *WhiteStone residents receiving assistance (19)*
  - o (19) independent living
  - o (0) memory care / assisted living

**NEW REFERRALS: SCHOLARSHIP & OUTREACH:**

- (13) potential referrals are being processed by our Outreach Coordinator*
- (5) are for scholarships (Move-In Assistance)
  - (2) are for Long Term Assistance
  - (2) for Short-Term / Emergency Assistance
  - (0) may fall into Outreach or Scholarship in time

If you know of a member needing assistance, please contact our Director of Fraternal Friendship at [jgrant@meshhome.org](mailto:jgrant@meshhome.org) or by calling (336)601-5593.



## VI. WHITESTONE FINANCE REPORT

Ongoing - The 401k audit is in the final stages of completion. The additional contributions for prior year compliance testing added to some of the work for the 2022 audit as well. – UPDATE this is being filed and Tracy and working on the 5500.

Ongoing -The 990 is next on my list to complete.

Ongoing -- There is still one year that needs to be corrected as it relates to the 401k Compliance testing situation and that is 2020. This will have to be corrected by 12/31/2023. One touch base call with all the communities has been held and will continue to be done throughout the year. – UPDATE I have sent Tracy the contribution list and requested funds from the unrestricted investment account per approval by the Finance Committee and the Executive Committee. I have requested that Tracy submit the contribution by end of day on 10/6/2023.

Ongoing – 401k filing penalty – the letter regarding the automatic extension has been sent to the IRS. Communications with CLA regarding the appropriate time to follow up are being had and when the appropriate amount of time has passed a follow up will be done. – UPDATE – Nikki needs to reach out to IRS.

The work with LCS Reliance has been successful so far. Not only the billing and AR work but also review of some procedures and assistance with corrections in areas of weakness.

Joe Bodenheimer has been hired as the new Staff Accountant. Joe comes to WhiteStone with 8+ years of public accounting experience working on audits and tax for multiple industries including not for profits and 990 tax returns. Joe attends orientation on 10/5/2023 with his first official office day being Wednesday October 11<sup>th</sup>. Joe is going to be a great addition to the accounting team and the WhiteStone community.

Alexiss Moore has been hired to replace Ms. Patel as the administrative assistant for the Linville Building Reception area. Alexiss will attend orientation on Thursday October 12<sup>th</sup> and then begin her new role with support and training the first few days from Archana.

WhiteStone has been assigned a new trustee agent at BNY for our 2017 and 2020 bonds. Jennifer Reid “Jenny” is the new agent and is working to catch up on the account one area being the 2020 B2 Entrance Fee bonds that WhiteStone will successfully have enough funds to cover by 10/6/2023. Future updates on the bonds being called and paid early will be provided once document verification has been completed. Jenny’s interpretation of the bond docs is that the agent can call the bonds once funds are deposited with the trustee and available without approval to the community. She is verifying this and will update once confirmed. One positive note is that paying these bonds early will save the community in interest expense.

The opening of the ALMC building and the transitioning of staff has created some IT projects that are being navigated as quickly as they can. Still finishing up some last-minute IT areas with ALMC as well as staff office phones.

Employee Retention Credit (ERC) numbers have been submitted to CLA for review and conversations regarding more detail for some numbers are being had. As a reminder this can be a lengthy process and one

that must be done carefully. Any updates will be sent but this will not happen quickly as time to review and ensure accuracy is required. As another reminder this is not guaranteed but an analysis of the numbers are being done thoroughly to determine if WhiteStone qualifies. – UPDATE – the IRS has paused all applications due to audits and fraudulent application requests. This is one reason we have taken our time to do our due diligence to ensure the numbers we will be submitting with our application. Even though the IRS has paused new applications we still fully intend to apply when the window opens back up in 2024.

The budget is still a work in progress, but most adjustments have been completed and a first draft Finance Committee review is anticipated mid-October.

Please note that an error was found in the Q2 Bond Covenants. The covenants have been recalculated and resubmitted to EMMA. One error was a formula error but the other was the inclusion of the Expansion Entrance Fees which are not allowed to be used in the calculation. After corrections the community is still in compliance with debt covenants.

## **VII. WHITESTONE FOOD & BEVERAGE**

### **Cost of Goods**

Our cost of goods has remained steadily under budget for August, per our Declining Balance sheet. Chef Kyle has worked diligently to cross reference costs between vendors to keep our expenditures in line.

### **Bistro**

We've hired a new Bistro employee by the name of Krista Regina-Mendoza. She's been off to a great start and has already helped to enhance our level of service and customer satisfaction.

### **FullCount features**

We are in the process of adding several additional features to FullCount, to include Reservations, Online Ordering and Resident Portal. This will allow residents to book reservations through FullCount, place orders online for dining in to reduce wait times, and the Resident Portal so they can see all of their billing information through their app.

### **International Cuisine**

We are beginning to feature a global menu one day per month on our Independent Living Daily Menu. Our plan is to feature countries whose cuisine is less mainstream but modify the selections slightly to make them more appealing and palatable to our residents.

### **IL Dining Room Host**

We've added a dinner time host to our staffing roster. This has helped us control our flow during peak hours and reduce wait times.

## VIII. WHITESTONE COMMUNITY LIFE SERVICES REPORT

**CLS STAFFING UPDATE(S):** Stable with current employees – Have the following positions open – will hire for these as I get the green light:

2 full time in Assisting Living and 1 part time (not hiring yet)

### CLS PROJECT UPDATE(S):

Tracking resident volunteer(s) and hours to enhance program and opportunities.

Total Number of Resident Volunteer Hours: 223.75 (9.32 Days)

### CLS Independent Living Programming:

Total Number of Activities: 85	Average Participation: 14.1 Participation Percentage: 94.1%
Total Number of Sessions: 179	(80/85 Activities had participants) Resident Percentage: 79.8%
Total Number of Cancellations: 6	166/208 *Participated in at least one (1) activity
Total Participation: 2516	Total Number of Check-Ins: 200

Changes since August:

- Total Number of Activities increased by 20 (30.77% Increase)
- Total Number of Sessions increased by 6 (3.47% Increase)
- Total Participation decreased by 238 (8.64% Decrease)
- Average Participation decreased by 1.8 (11.32% Decrease)
  - (Note: Average = Total Participation/Total Number of Sessions)
- Participation Percentage decreased by 1.3%
- Resident Participation decreased by 2.7%
- Total Number of Check-Ins decreased by 8 (3.85% Decrease)
- 4 Sessions of Intergenerational Activities (Chess with Students)

### Other Items:

- Preparing for the Fall Festival in October at WhiteStone
- Gina will be out of the office October 6-15<sup>th</sup> returning on October 16<sup>th</sup>. Will be attending the LCS – CLS Conference in Des Moines, IA.
- 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 and in to Point Click Care as we get them.

- Working with Mandy, Lora, Allison and Hollis to develop a program for low functioning residents in the care and wellness center.
- Working with Mandy, Lora, and Allison to develop a schedule to keep residents in living rooms active in between scheduled activities.
- Continuing to work on Chit Chat and Care Center Connections – due once a month.
- Continue to work on next month’s calendar preparation.
- Continuing to edit and add email addresses for CWC family members.
- Gearing up for the Holidays and festivities around WhiteStone

## **IX. WHITESTONE CHAPLAIN & SPIRITUAL SERVICES REPORT**

Sunday services – 3 services (guest speaker 9/17)

Funerals officiated- 1 (Brundage)

Recorded Encounters (not counting group activities, some brief encounters or phone calls)

CWC – 30+ (some with family present)

IL- 40 + (with 1 hospital visits)

Employee – 0

Weekly Bible studies/worship

CWC/Wisteria combined 4 (with singing)

IL – 0 (will start back 10/19)

Difficult Conversations panel presentation 9/26

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

Miscellaneous: attended IL coffees and other activities as able, led Sing – Along, Assisted with Resident Orientation, continued card ministry, prepared articles for newsletters, provided grief support to families, conducted occasional lunch/dinner walk throughs to greet residents, made phone calls

Working on the following: “pet blessing” for October 4, planning support for new ALF, Rabbi lunch planned Oct 26th, working on obtaining a small area for a meditation room open to all faiths, assisting with resident-led singing ensemble.



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## WHITESTONE EXPANSION REPORT(S)

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### Updates/Accomplishments – September 2023

- **Site Work**
  - All inspections completed for City of Greensboro
  - Landscaping & Irrigation complete except for warranty items
  - Dead landscaping being identified for fall replacement as part of warranty items
- **CWC – Care and Wellness Center:**
  - Phase 4: Final Phase - Renovation started May 22, 2023
    - Received Final clearance from Division of Health Service Regulation (DHSR) September 26, 2023
    - Proceeding with DHSR Licensure and Certification
  - Pool Renovation:  
Received Final clearance from Division of Health Service Regulation (DHSR) September 26, 2023
- **IL – Independent Living:**
  - Final punch work mostly complete completed
  - Resident move-ins in progress, 43 closed
- **AL – Assisted Living:**
  - Received Final clearance from Division of Health Service Regulation (DHSR) September 26, 2023
  - Proceeding with DHSR Licensure and Certification
  - Final punch/warranty items are mostly complete

### Next Steps/Milestones

#### Assisted Living / Memory Care:

- Obtain DHSR Licensure approval to occupy AL/MC

#### Care and Wellness:

- Obtain DHSR Licensure approval to occupy

#### Therapy Pool:

- Work Complete

Independent Living:

- Final punch/warranty mostly complete

**CONSTRUCTION FOOTAGE LINK:**

[https://www.youtube.com/playlist?list=PL7tINPs8fkXPuy7\\_wdXlm1vKPxy6-jZTf](https://www.youtube.com/playlist?list=PL7tINPs8fkXPuy7_wdXlm1vKPxy6-jZTf)