

AS OF: 3/29/24

Unit #	Type	Resident Name	Resid.	Occup.	2nd Person	Avail.	Sold/ Reserved	Total Units	Move in Date
BENNETTE									
341	Apt - Kitchenette	Out of Inventory	0	0	0	0	0	0	
342	Studio	Out of Inventory	0	0	0	0	0	0	
141	Studio	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	0	1	0	0	0	1	
146	Studio		0	0	0	1	0	1	
148	Studio	Out of Inventory - Eye Clinic	0	0	0	0	0	0	
149	Apt - Kitchenette	Ridings, Judy	1	1	0	0	0	1	
241	Apt - Kitchenette		0	0	0	1	0	1	
244	Apt Plus - Kitchen		0	0	0	1	0	1	
245	Apt - Kitchenette	Smith, Roy	1	1	0	0	0	1	1/3/2024
248	Apt Plus - Kitchen	Hall, Ray	1	1	0	0	0	1	
249	Apt - Kitchenette	Kelly, Dwight	1	1	0	0	0	1	
250	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	
343	Apt - Kitchenette		0	0	0	1	0	1	
344	Studio	OES Storage	0	0	0	0	0	0	
345	Apt - Kitchenette	Aquino, Annie	1	1	0	0	0	1	
346	Apt - Kitchen	Kidd, Juddith	0	0	0	0	1	1	TBD
348	Studio	Office	0	0	0	0	0	0	
349	Apt - Kitchenette		0	0	0	1	0	1	
350	Apt - Kitchenette	Memory, Billie	1	1	0	0	0	1	
BENNETTE			10	11	0	6	1	18	

LATHAM									
261	Apt - Kitchen	Hicks, Bruce	1	1	0	0	0	1	
262	Studio	Out of Inventory	0	0	0	0	0	0	

220	Alamance	Ingram, Richard	1	1	1	0	0	0	0	1	3/19/2024
221	Forsyth	Ferguson, Donna	0	0	0	0	0	0	1	1	
311	Davidson	Brundage, Brenda	1	1	1	1	0	0	0	1	
312	Guilford	Christenson, Gerold & Linda	2	1	0	0	0	0	0	1	
313	Randolph	Mull, Vernon & Sally	2	1	1	1	0	0	0	1	
314	Randolph	Elaine Germaine and Lisa Germain	2	1	1	1	0	0	0	1	
315	Caswell		0	0	0	0	1	1	0	1	
316	Forsyth	Dowless, Jimmie & Norma	2	1	0	0	0	0	0	1	
317	Caswell	Underwood, Woody & Becky	2	1	0	0	0	0	0	1	
318	Alamance	Waak, Patricia	1	1	0	0	0	0	0	1	3/4/2024
319	Alamance	Street, Robert & Patsy	2	1	1	1	0	0	0	1	
320	Caswell	Serdensky, John & Joan	2	1	1	1	0	0	0	1	
321	Alamance	Buttman, Henry	0	0	0	0	0	0	1	1	4/5/2024
322	Forsyth	Gromada, Ted & Terry	0	0	0	0	0	0	1	1	4/26/2024
411	Davidson	Pugh, Bruce	0	0	0	0	0	0	1	1	
412	Guilford	Oakley, Cheryl	1	1	1	0	0	0	0	1	
413	Randolph	Speetjens, Vivian	1	1	1	0	0	0	0	1	
414	Randolph	Joe & Judy Gecinger	2	1	1	1	0	0	0	1	
415	Caswell	Searmon, Judy	1	1	1	0	0	0	0	1	
416	Forsyth	Folin, Dee	1	1	1	0	0	0	0	1	3/22/2024
417	Caswell	Pearce, Alice	1	1	1	0	0	0	0	1	
418	Alamance	Wilkerson, Fred	1	1	1	0	0	0	0	1	
419	Alamance	Alaifs, Arline	1	1	1	0	0	0	0	1	
420	Caswell	Hester, Sarah	1	1	1	0	0	0	0	1	
421	Alamance	NeSmith, Billie	1	1	1	0	0	0	0	1	
422	Forsyth	Smith, Dell & Catherine	0	0	0	0	0	0	1	1	4/1/2024
511	Davidson	Berthold, Shirley	1	1	1	0	0	0	0	1	
512	Guilford	Gardner, Wilma	1	1	1	0	0	0	0	1	
513	Randolph	Hamrick, James and Gladys	2	1	1	1	0	0	0	1	
514	Caswell	Wilson, Ann	1	1	1	0	0	0	0	1	
515	Forsyth	King, Dorsey & Mary Ann	2	1	1	1	0	0	0	1	
516	Caswell	Acker, Kenneth	1	1	1	1	0	0	0	1	
517	Alamance	Archer, Susan	1	1	1	0	0	0	0	1	
518 ADA	Alamance	Peoples, Elma	1	1	1	0	0	0	0	1	
519	Caswell	Donnell, Connie	1	1	1	0	0	0	0	1	

520 ADA	Alamance	Ross, Virginia	1	1	0	0	1	1	0	0	1	2/16/2024
521	Forsyth	Pitts, Jim & Sharon	2	1	1	0	1	1	1	0	1	2/16/2024
INDEPENDENT LIVING South Wing			52	40	11	1	5	46				

INDEPENDENT LIVING West												
101 CL	Yadkin	Hale, Robert	1	1	0	0						1
103 CL	Yadkin	Wanless, Ron & Penny	2	1	1	0						1
105	Iredell	Merryman, Gene & Martha	2	1	1	0						1
107	Wilkes	Blake, Steve & Burbank, Connie	2	1	1	0						2/22/2024
109	Wilkes	Ulrich, Helen	1	1	0	0						1
110 ADA	Chatham	Meyers, Wilma	0	1	0	0						1
112	Chatham	Simpson, Bob	1	1	0	0						1
113 CL	Iredell	Jeffries, Marti	1	1	0	0						1
114	Davie	Anderson, Jean	1	1	0	0						2/14/2024
115	Davie	Wyrick, Linda	1	1	0	0						1
223	Yadkin	Hibshman, Richard & Joyce	2	1	1	0						1
224	Wilkes	Delaune, JoAnn	1	1	0	0						1
225	Yadkin	Johnson, Bob & Lauralee	2	1	1	0						1
226 ADA	Unit G - deluxe 1 br	Cox, Lib	1	1	0	0						1
227 CL	Iredell	Levin, Bob & Ellen	2	1	1	0						1
45294	Wilkes	Alker, Richard & Nancy	1	1	0	0						1/3/2024
229	Wilkes	Heller, Linda	1	1	0	0						1
230	Iredell	Walker, Edwin / Stanley, Robin	2	1	1	0						1
231	Wilkes	Young, Judy	1	1	0	0						1
232 CL	Unit H - Davie	Rafanovic, Frances	1	1	0	0						1
233	Iredell	Gasner, Meryl	0	0	0	0			1			4/26/2024
234	Davie	Cooper, Jim & Frances	2	1	0	0						1
235	Davie	Foster, Nancy	1	1	0	0						1
323	Yadkin	Dille, Thomas & Paula	2	1	1	0						1
324 ADA	Wilkes		0	0	0	1						1
325	Yadkin	Wright, Ted & Brenda	2	1	1	0						1
326	Iredell	Ayers/Livingston, Bruce/Patsy	2	1	1	0						1
327	Iredell	Rich, Lloyd & Libby	2	1	1	0						1/15/2024
328	Wilkes	Sanderson, Sandy & Barbara	2	1	1	0						1
329	Wilkes	Bill & Barbara Walters	2	1	1	0						1

330	Iredell	Allen, Betty	1	1	0	0	0	1	1/23/2024
331	Wilkes	Brownlee, Stuart	1	1	0	0	0	1	
332	Chatham	Cuozzo, Annette	1	1	0	0	0	1	2/29/2024
333	Wilkes	Meurer, Skip & Caroline	2	1	1	0	0	1	
334	Chatham	Pike, Carol	1	1	0	0	0	1	3/6/2024
335	Iredell	Thomas, Phylis	1	1	0	0	0	1	
336	Davie	Williams, Bob & Hallie	2	1	1	0	0	1	
337	Davie	Jones, Charlie & Phyllis	2	1	1	0	0	1	
423	Yadkin	Nottage, Terry	1	1	0	0	0	1	
424 CL	Wilkes	Austin, Judie	1	1	0	0	0	1	
425	Yadkin	Amos, Dave & Bonnie	2	1	1	0	0	1	
426	Iredell	Anoldus, Wayne & Nancy	2	1	1	0	0	1	3/20/2024
427 ADA	Iredell	Miller, Daniel & Gail	2	1	1	0	0	1	
428	Wilkes	Helfton, Susan	1	1	0	0	0	1	
429	Wilkes	Pulcher, Ardeth "Ardie"	1	1	0	0	0	1	
430	Iredell	Manning, Bob & Eva	2	1	1	0	0	1	1/29/2024
431 CL	Wilkes	Robinson, Elliot & Priscilla	2	1	1	0	0	1	2/16/2024
432 CL	Chatham	Coiner, Sherlon	0	0	0	0	0	1	4/2/2024
433	Wilkes	Young, Elaine	0	0	0	0	0	1	4/25/2024
434	Chatham	Duff, Bob	1	1	0	0	0	1	2/9/2024
435	Iredell	Krueger, Sheldon & Barbara	2	1	1	0	0	1	
436	Davie	Cotton, Carolyn	1	1	0	0	0	1	
437	Davie	Kaley, Jim & Martha	2	1	1	0	0	1	
523	Yadkin	Hartley, Lane	1	1	0	0	0	1	
524	Wilkes	Farmer, Jaquiline	1	1	0	0	0	1	
525	Yadkin	Long, Catherine	1	1	0	0	0	1	
526	Iredell	Dresie, Ted & Kelly, Bob	2	1	0	0	0	1	
527	Iredell	Greenstein, Allen & Anita	2	1	0	0	0	1	
528 CL	Wilkes	Williams, Loretta	1	1	0	0	0	1	
529	Wilkes	Sigler, Gail	1	1	0	0	0	1	
530	Iredell	Johnson, Glenda	1	1	0	0	0	1	
531	Wilkes	Dobson, Joel	1	1	0	0	0	1	
532	Chatham	Dowdy, James & Kathryn	0	1	0	0	0	1	1/29/2024
533	Wilkes	Lilly, Annette	1	1	0	0	0	1	
534	Chatham	*James, Michael	0	0	0	0	0	1	TBD

535	Iredell	Johnson, Bobby	1	1	0	0	0	1	1
536	Unit J - Penthouse	Wasoff, Craig & Louise	2	1	1	0	0	1	1
INDEPENDENT LIVING West Wing									
			87	62	24	1	4	67	
COTTAGES									
2A	1 BR	Lyons, John	0	1	0	0	0	1	1
2B	1 BR	Dell Orfano, Robert	1	1	0	0	0	1	1
2C	1 BR	Sansbury, Amelia	1	1	0	0	0	1	1
2D	1 BR	Bowman, Donna	0	0	0	0	1	1	TBD
2E	1 BR	Troxler, George	1	1	0	0	0	1	1
4A	2 BR	Casey, Adele	1	1	0	0	0	1	1
4B	2 BR	Haun, Patrick	1	1	0	0	0	1	1
6A	1 BR	Kirkman, Susan	1	1	0	0	0	1	1
6B	1 BR	Yarbrough, Tommy & Peggy	2	1	1	0	0	1	1
6C	1 BR	Russell, Dot	1	1	0	0	0	1	1
6D	2 BR	Menius, Jim	0	0	0	0	1	1	1
6E	2 BR	Wilmoth, Maria	1	1	0	0	0	1	1
6F	2 BR	Davis, Mary	1	1	0	0	0	1	1
6G	2 BR	Roberts, Susan	1	1	0	0	0	1	1
6H	2 BR	Sudderth, Rusty	0	0	0	0	1	1	TBD
6J	2 BR	Holt, Becky	1	1	0	0	0	1	1
COTTAGES			13	13	1	0	3	16	
HOUSES									
1ESC	House	Rathbone, Robert & Patricia	2	1	1	0	0	1	1
2ESC	House	Wilkerson, Thomas and Lynn	2	1	1	0	0	1	1
3ESC	House	Dietz, Jane	1	1	0	0	0	1	1
1FRAT	Duplex	Wells, Ellen	1	1	0	0	0	1	1
3FRAT	Duplex	Richman, Rich & Margaret	2	1	1	0	0	1	1
701FREE	House	Wilson, Ruth	1	1	0	0	0	1	1
702FREE	House	Griffin, Peggy	1	1	0	0	0	1	1
703FREE	House	Payne, Ella	1	1	0	0	0	1	1
704FREE	House	John & Marilyn Lauritzen	2	1	1	0	0	1	1
705FREE	House	Phillips, Edgar	1	1	0	0	0	1	1
706FREE	House	Walters, Jack	1	1	0	0	0	1	1







707FREE	House	King, James & Joan	2	1	1	0	1	1	1	1
708FREE	House	Vinroot, Robert & Pat	2	1	1	0	1	1	1	1
709FREE	House	Proudfit, John & Donna	2	1	1	0	1	1	1	1
710FREE	House	Wegner, Gary & Sandra	2	1	1	0	1	1	1	1
801FREE	House	Carlson, Carol	1	1	0	0	1	1	1	1
803FREE	House	Workman, Annette	1	1	0	0	1	1	1	1
805FREE	House	Bowers, Earl & Cindy	2	1	1	0	1	1	1	1
807FREE	House	Robbins, Alice	1	1	0	0	1	1	1	1
900FREE	House	Newton, Donna & Bob	2	1	1	0	1	1	1	1
901FREE	House	Hogarth, Karen	1	1	0	0	1	1	1	1
902FREE	House	Cole, Herbert	1	1	0	0	1	1	1	1
903FREE	House	Tom Parham & Nancy Howard	2	1	1	0	1	1	1	1
905FREE	House	Ostrowski, Elaine	1	1	0	0	1	1	1	1
907FREE	House	Cassell, Ron & Barbara	0	0	0	0	1	1	1	6/1/2024
1001FREE	Duplex	Mantooth, Joyce	1	1	0	0	1	1	1	1
1003FREE	Duplex	Carpenter, Carol	1	1	0	0	1	1	1	1
1005FREE	House	Brady, Pat	1	1	0	0	1	1	1	1
1098FREE	House	Etherington, Donald & Lallier, Monique	2	1	1	0	1	1	1	1
1100 FREE	House	Fritz, Ted	1	1	0	0	1	1	1	1
700RL	House	Phelps, Ed	1	1	0	0	1	1	1	1
701RL	House	Aebersold, Nancy	1	1	0	0	1	1	1	1
702RL	House	Sigmon, Katy	1	1	0	0	1	1	1	1
703RL	House	Caison, Amelia & Leslie	2	1	1	0	1	1	1	1
704RL	House	Finley, Jean Anne	1	1	0	0	1	1	1	1
705RL	House	Schiller, Ernie & Betsy	0	0	0	0	1	1	1	1
706RL	House	Moore, Ron & Brenda	2	1	1	0	1	1	1	1
707RL	House	Inman, Dennis	1	1	0	0	1	1	1	1
709RL	House	McCrickard, Donald	1	1	0	0	1	1	1	1
1SRC	House	Williams, Genevieve	1	1	0	0	1	1	1	1
3SRC	House	Milkin, Corinth	0	0	0	0	1	1	1	6/4/2024
4SRC	House	Atwell, Alan and Betty	2	1	1	0	1	1	1	1
5SRC	House	Russell, Eugene & Evelyn	2	1	1	0	1	1	1	1
6SRC	House	Rogers, Richard & Judy	2	1	1	0	1	1	1	1/31/2024
7SRC	House	Henderson, Mary Anne	1	1	0	0	1	1	1	1
8SRC	House	Nance, Miriam	1	1	0	0	1	1	1	1
9SRC	House	Lewellyn, Gene & Maggie	2	1	1	0	1	1	1	1

10SRC	House	Windham, Gordon & Jeanette	2	1	1	0		1
1YRC	House	Davis, Jerry & Sylvia	2	1	1	0		1
2YRC	House	Stewart, Linda	1	1	0	0		1
3YRC	House	Doughton, Walter and Barbara	2	1	1	0		1
4YRC	House	Pell, Gerald & Suzanne	2	1	1	0		1
5YRC	House	Bhagat, Abe & Julie	2	1	1	0		1
6YRC	House	Leone, Mike	1	1	0	0		1
HOUSES			74	51	23	0	3	54

TOTALS

# Residents	247	187	60	8	16	211
		Occupied	2nd per	Available	Sold/Reserved	Total Units

211	Total Units
187	Occupied
89%	% Occupied
203	Sold/Reserved
96%	% Sold/Reserved

-  Foundation
-  Out of Inventory
-  Resident Expired/30 day Wait- to HLOC
-  Sold/Reserved - Paid 10%
-  Available
-  Transfer (IL to IL)

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January 2024

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

WhiteStone
A MASONIC & EASTERN STAR
COMMUNITY  EST. 1912

Founded on fellowship. Inspired by you.

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

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VISIBILITY JANUARY 2024

WHITESTONE COMMUNITY VISIBILITY – LEADERSHIP:

DATE(S):	MEETING(S)/EVENT(S)
Weekly:	<i>Women’s Coffee – Fellowship Hall 9am-10:30am, Wednesdays</i>
Weekly:	<i>Men’s Coffee – Fellowship Hall 9am-10:30am, Fridays</i>
Weekly:	<i>Wine Down – Fellowship Hall 3:30pm-5pm, Fridays</i>
Monthly:	<i>Masonic Luncheon – 1st Tuesday of every month</i>
January 16 th	<i>Progressive Tour – Marketing Event</i>

WHITESTONE FRATERNAL VISIBILITY

DATE(S):	MEETING(S)/EVENT(S)
Monthly:	<i>Masonic Luncheon at WhiteStone [1st Tuesday] Main Dining Room</i>
Monthly:	<i>MESH Chapter #379 Meeting [1st Tuesday] Fellowship Hall</i>
Monthly:	<i>MESH Lodge #771 Meeting [2nd Saturday] Fellowship Hall</i>
January 26 th	<i>OES Foundation Board Meeting</i>

WHITESTONE RESIDENTS: COMMITTEES, SERVICES & SUPPORT

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

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

Monthly: *WhiteStone Resident Committee: Auxiliary [3rd Wednesday]*

Monthly: *Resident Council Meeting [3rd Thursday] Fellowship Hall*

As Needed: *WhiteStone COVID Task Force*

WHITESTONE BOARD OF DIRECTORS: COMMITTEES, SERVICES & SUPPORT

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

LIFECARE SERVICES [LCS]: SERVICES & SUPPORT

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

January 16th *Jacob Elliott site visit*

WHITESTONE EXPANSION: PROJECT(S) & REPORTING

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

WHITESTONE TECHNOLOGY INFRASTRUCTURE: PROJECT(S) & REPORTING

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

WHITESTONE NEW RESIDENT: PROSPECTING EVENT(S):

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

Monthly: *New Resident Orientation [3rd Wednesday]*

January 16th *Progressive Tour – Marketing Event*

WHITESTONE EMPLOYEE: DECEMBER ANNIVERSARIES

SERVICE DATE:	EMPLOYEE NAME:	TITLE:	DEPARTMENT	YEARS OF SERVICE:
1/6	<i>Lashena Brooks</i>		<i>Nursing</i>	<i>2 years</i>
1/6	<i>Uriah Farrar</i>		<i>Food & Beverage</i>	<i>2 years</i>
1/19	<i>Sherella Edwards</i>		<i>Nursing</i>	<i>1 year</i>
1/25	<i>Anne Donaghy</i>		<i>Nursing</i>	<i>14 years</i>
1/25	<i>Ashley Thorpe</i>		<i>Environmental Services</i>	<i>14 years</i>

SERVICE DATE:	EMPLOYEE NAME:	TITLE:	DEPARTMENT	YEARS OF SERVICE:
1/28	Mary McMillan		Business Services	15 years
1/31	Walter Edmond		Environmental Services	13 years

WHITESTONE EMPLOYEE: RECOGNITION, RECRUITMENT, & RETAINMENT:

DATE(S):	MEETING(S)/EVENT(S)
Bi-Weekly	New Hire and General Orientation
January 11 th	Employee Financial Wellness Class - Budgeting
January 22 nd – January 26 th	Activities Professionals Week
January 24 th	Outdoor Adventures Club Meeting
January 31 st	Hot Chocolate Bar



KEY PERFORMANCE INDICATORS – JANUARY 2024

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

YTD EXPPOR	Operational expenses budgeted at \$1,904,873 with actual of \$1,789,216. A positive variance of \$115,657 YTD. EXPPOR YTD budget at \$7,034 with actual 6,735.
YTD Closings IL	Budget of 3 with actual of 6.
YTD Net Sales IL	Budget of 1 with actual net sales at 6.
YTD NOI	Actual of (\$98,613) on budget of (\$216,651), a positive variance of \$118,038.
YTD REVPOR	Operational revenue budget for 1,688,222 with actual 1,690,603 a positive variance of 2,381. REVPOR budget of 5,656 with actual 6,129.
HC MTD Occupancy	Average occupancy for the month at 77.4 with budget at 77.3. Currently average of 76.8 for February.

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

IL MTD Occupancy	Average occupancy of 174.8 on budget of 180.5. Ended January at 181 occupied.
AL MTD Occupancy	Averaged 9 occupied for the month of January on a budget of 11. Currently occupied at 11.

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

Memory Care MTD Occupancy	Residents have not yet moved into memory care neighborhood.
Days in AR	90 days outstanding actual of 436,456, a negative variance to 15% goal (236,406). Received MCD payment in February of 267,495, which was large portion of outstanding AR.



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

During the month of January, WhiteStone continued to experience a small number of COVID-19 cases across campus. This includes both residents and staff testing positive. We will continue to closely monitor the impact of the virus on our campus and provide updates as necessary.

Because those we care for in the Care and Wellness Center are typically at greater risk, we are following more stringent safety guidelines. Due to the increase in respiratory illness in the greater Greensboro community, staff, visitors, and family members that enter the CWC are required to wear a mask.



WHITESTONE LEADERSHIP TEAM: DIRECTORS REPORT

DIRECTOR NAME	DEPARTMENT
<i>Mrs. Tracy Armwood, SPHR</i>	<i>Director, Human Resources</i>
<i>Mr. Robert Reese</i>	<i>Director, Environmental Services</i>
<i>Mr. Rick Berkimer</i>	<i>Director, Plant Operations</i>
<i>Mr. Josh Hillegass, LNHA</i>	<i>Health Services Administrator</i>
<i>Ms. Marie Dunn</i>	<i>Director, Marketing & Sales</i>
<i>Mrs. 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 & Chaplain</i>
<i>Ms. Nikki Stafford</i>	<i>Director, Finance</i>
<i>Mr. Jonathan Szarke</i>	<i>Director, Food & Beverage</i>

Mrs. Archana Patel

Executive Assistant

I. WHITESTONE HEALTH CENTER ADMINISTRATION REPORT

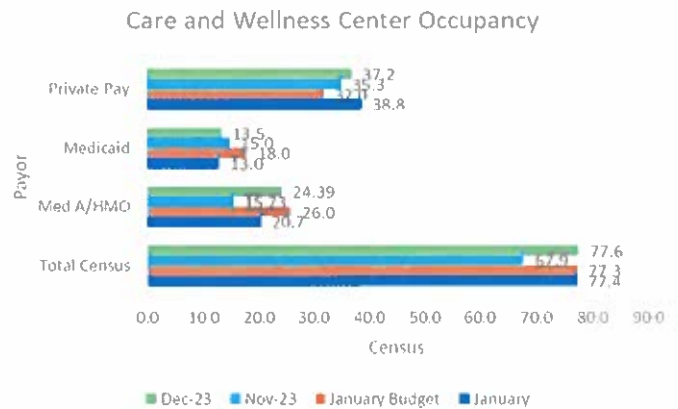
JANUARY 2024 OVERVIEW:

I'm excited to announce that we will be having Lionel "Ray" Robinson, Assisted Living Manager, join our team in the month of February. Ray comes to us with an extensive background in Assisted Living Communities as the Administrator/Executive Director. We look forward to Ray's leadership and experience allowing us to continue to grow and excel in our Assisted Living operations.

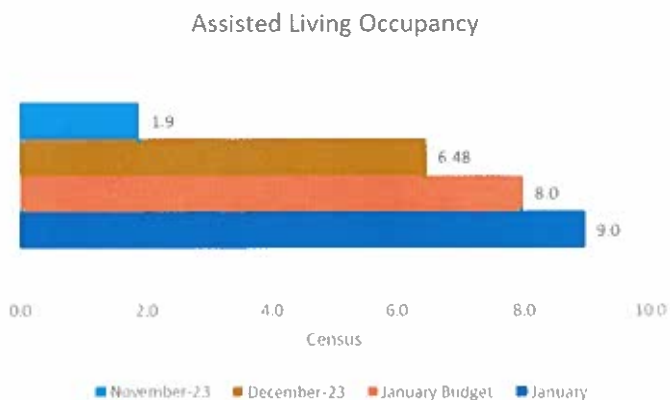
Following our Annual Survey completed in December, our Life Safety Survey was conducted on January 18th. During this survey, our physical plant and environment are inspected to ensure that all requirements of the Life Safety Code are met. During our Survey this year, eight deficiencies were identified, all relating to minor Life Safety Code requirements. These areas range from the latching of doors, labeling of electrical panels, and routine testing of receptacles. Our team has completed a comprehensive Plan of Correction for these deficiencies, and we are actively working to resolve and maintain forward progress.

Census Updates:

Our Care and Wellness Center continues to maintain strong occupancy throughout the end of 2023 and into 2024. In the month of January, the Care and Wellness Center met our overall budgeted occupancy goals but fell short in our Medicare/Managed Care budget. Our Admissions Coordinator, Brittany, has been hard at work to create a strong referral network and to market our community to the Greater Greensboro Area.



Over the past three months, we've seen a consistent growth in our Assisted Living Census since we opened in November. While we've had consistent growth so far, our Interdisciplinary Team is hard at work to continue to identify and garner interest in moving to Assisted Living from our current Residents. I'm hopeful that with the addition of Ray Robinson, we'll see greater growth in our Assisted Living over the coming months.



Clinical Updates:

Our Care Center experienced an outbreak of COVID-19 during the month of December. I'm thankful to report that all affected Residents and Staff have since recovered and are doing well. Considering this, the Care Center continues with our mask policy to reduce the potential for spread of respiratory illness. We have been asking all visitors to the Care Center to refrain from visiting if experiencing any signs/symptoms of respiratory illness to protect our Residents.

In the month of January, we received the resignation of our Assistant Director of Nursing, Natalie McMasters, along with the resignation of our MDS Nurse, Cindy Nsiah. Both individuals have been with WhiteStone for several years, we appreciate all the care and support they have given to our community, and we wish them well on their next ventures. Over the coming weeks, we'll be working diligently to recruit and build a strong Nursing Leadership Team.

II. WHITESTONE HUMAN RESOURCES REPORT

DECEMBER 2023 OVERVIEW

Turnover

2.23% turnover YTD 2024. Compared to 2.89% through January 2023.

Overtime:

1043.85 hrs of OT for January. Compared to 780.80 hrs for January 2023. An increase of 263.05 hrs on the month and total YTD increase in overtime from last year by 263.05 hrs.

Workers Compensation:

We have recently been informed that an employee whose worker comp claim was denied has retained an attorney. We do have an assigned attorney to work with us on this case.

EEOC & Legal Updates:

In both EEOC open cases we are still awaiting a response from the EEOC after the submission of our position statements. Both cases have recently been moved to the Charlotte District due to staffing issues.

Budgeted FTEs:

Total December FTEs: 198.79

Total Budgeted FTEs: -214.92

Variance: -16.13 FTEs **UNDER** budget.

Those over budget for the month are as follows:

Servers – Overbudget by .78 FTEs

Cooks – Overbudget by 1.55 FTEs

AL CNAs – Overbudget by 2.33 FTEs

Job Openings Report:

<u>MONTHLY TURNOVER</u>		
	2024	2023
Jan	2.23%	2.89%
Feb		0.41%
Mar		4.68%
Apr		2.16%
May		2.62%
Jun		2.04%
Jul		4.35%
Aug		5.77%
Sep		2.94%
Oct		3.62%
Nov		1.05%
Dec		2.11%
TOTAL	2.23%	34.64%

Reported on: 2.5.24

IMMEDIATE OPENINGS

Job Title	# of Openings	New Candidate Pipeline	Attempting to Contact	Interviews Scheduled	Offers Pending
Charge Nurse - 1st shift Part time	2		13	17	1
Charge Nurse - 2nd shift Fulltime	3			20	1
Charge Nurse - 2nd shift Part time	1		13	17	
Charge Nurse - 3rd shift Fulltime	3			1	
Charge Nurse - 3rd shift Part time	1		13	17	
CNA - 1st shift Full Time			2	2	
CNA - 1st shift Part Time	2		2	2	
CNA - 2nd shift Fulltime	2		2	2	
CNA - 2nd shift Part time	4		2	2	
CNA - 3rd shift Part Time	3		2	2	
Nurse Supervisor - 3rd shift Full time	1		1		
MDS Coordinator FT/PT	1		1		
Health & Wellness Nurse FT/PT	1		4	9	
Server FT	1		7	5	1
Lead Server FT	1		8		
Utility FT	1		16		
Housekeeping	1		1	2	
Dietary Aide	1		3	1	
total openings:	29				
				Total Offers:	
				Interviews Scheduled:	
		Openings after Offers:		28	
Ready for Orientation:	4 news hires for 2/15/24				

Recruiting:

- *January 2024: 397 New Candidates*
- *55 Scheduled interviews*
- *23 offers with 17 hires.*

We are entering the spring job fair season. Below are the many scheduled events we have planned.

- *W.O.W. with NC Works Job Fair 2/7*
- *WSSU Job Fair 2/15*
- *NC Works Healthcare Job Fair 2/21*
- *Allen Middle School Career Day 2/23*

- *High Point University 3/14*
- *GTCC 2/27*
- *WhiteStone Onsite Job Fair 3/29*

Our biggest challenge is in the recruitment of RNs. Below are few things we are currently implementing.

We will be hosting in March FREE CEU workshops for RNs as a way to bring them to campus for a class and opportunity to introduce them to WhiteStone.

We will be increasing our Employee Referral program for RNs only to \$2,000 per referral. This will be paid for a successful hire over the course of one year.

We have a plan to actively recruit agency nurses with the goal to transition them to our team.

Retention:

We have a full calendar for employee appreciation this year. Below is our schedule for February and March.

February:

- *Black History Month*
 - *Staff Talent Show – March 1st, 3pm to 5pm & Wine Down*
- *National Wear Red Day – 2/2 (Get photo of all staff for post)*
- *Staff Super Bowl Fun – 2/9; Pizza for staff and wear your favorite team*
 - *Each department will order pizza for their own department*
- *Valentine’s Day Chocolate Fountain – 2/14*
 - *Location: AL 2nd Fl AL Kitchen; 1pm – 4pm*
- *Chili Cook Off – National Chili Day is 2/20th or 23rd; 11am-1:30pm*

March:

- *Emp Appr. National Potato Chip Day – 3/14*
 - *Chip and dip bar!!*
 - *Group Fitness Room; 2pm – 4pm*
- *St. Patrick’s Day – 3/17; Wear your green*
- *World Down Syndrome Day – Wear your Crazy Socks! – 3/21*
- *Spring On Site Job Fair – Friday, March 29th; 10am – 4pm*
 - *Education Center*
 - *Grinder Coffee Truck*

Recommendations and/or Other Information:

For 2024 our big focus is retention. We do have strong candidate flow in all positions with the exception of RNs. We are working to enhance the department onboarding experience to continue to reduce turnover.

III. WHITESTONE MARKETING & SALES REPORT

Monthly Marketing Report January 2024

Current Occupancy:	181 / 212	85%
Sold Occupancy:	201	95%

Available Units:	<u>Villa</u>	<u>Cottage</u>	<u>IL Apts</u>	<u>Res Apts</u>
	0	3	2	6

Explanation:	<u>Villa</u>	<u>Cottage</u>	<u>IL Apts</u>	<u>Res Apts</u>
		2-D	221, 432	144 Ben
		6-D, 6-H		146 Ben
				241 Ben
				343 Ben
				346 Ben
				349 Ben

Sales:	6	309 Lin, 434, 532 220, 334, 321	Cancel:	0
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Move-In: (Jan)	8	228, 245, 327, 110 330, 430, 532, 6 SRC	Upcoming MI:	114	107
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Transfers:				218	416
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MO (Jan):	5	334, 309, 220, 346 705 RL		431	422
				332	324
				521	411
				233	318
				705 RL	434
				426	220
				334	321

Upcoming MO:	<u>Unit</u>	<u>reason</u>	<u>Est MO</u>	
	907 FMD	AL		Beal
	3 SRC	AL		Cates
	315	CWC		Kivett
	244	HLOC		Otell
	262	HLOC		H. Smith

Upcoming Events:	2/8/2024	Brunch and Learn
	2/21/2024	New Resident Orientation
	2/28/2024	Wait List Diamond Dining

Department Highlights: Upgrading marketing materials for professional presentation.
 Improve overall community presentation with branded materials.
 Increase catering efforts for clean, professional presentations.

IV. WHITESTONE PLANT OPERATIONS / ENVIRONMENTAL SERVICES REPORT

PLANT OPERATIONS

- **December 2023 Activities**
 - *Completed onboarding of Joel King (Maintenance Supervisor) and Tony Moreno (painter). (Both are very strong employees and perfect hires for their position. The impact of each is already being felt.)*
- **Accomplishments for January 2024**
 - *Completed Sara pendant checks.*
 - *Completed HVAC filter changes.*
 - *Completed CWC repairs in accordance with Health Department requirements.*
- **Plans for February 2024**
 - *Award main kitchen floor repairs to flooring vendor. (Expect repairs to begin early-March.)*
 - *Provide architect with all data necessary to begin plans for the new walk-in coolers. (Quotes received from 2 of 3 vendors to replace CWC generator. Expect third quote to arrive in mid-February and project to be awarded in March.)*
 - *Meet with resident representatives to discuss wood shop in Gay Terrace.*
 - *Hold training for Security staff.*
 - *Hire 1 PT security guard.*
 - *Collect and organize all architectural drawings and place them in a cool, dry, safe area.*
 - *Identify storage areas for supplies and designate them "long term", "short term", "operational", and "bulk".*
 - *Develop list of property specific training topics with Plant Operations Supervisors.*
 - *Designate specific training days with Joel and David (e.g. 3rd Friday of every month).*

ENVIROMENTAL SERVICES

- **December 2023 Activities:**
 - *Conducted in-services with staff.*
 - *No fault attendance policy recap!! (Always)*
 - *Department Vision & Goals for 2024*
 - *Continuing Customer Service Care!*
 - *CWC changed lunch breaks.*
 - *Recap Training for all staff.*
 - *Employee Uniforms & I.D.'s always*
 - *EAP, please contact human resources for assistance.*
 - *Safety precautions for our community*
 - *Go over the Employee Handbook.*

- *Staff meeting every Wednesday@7:15am.*
- **Accomplishments for January 2024**
 - *Employee appreciations*
- **Plans for February 2024:**
 - *Hiring proper staff for our community (Housekeeping & laundry staff)*
 - *Only one carpet extractor is working properly.*
 - *Some staff have attendance issues.*
- **Issues and Concerns:**
 - *Hiring proper staff for our community (Housekeeping & laundry staff)*
 - *Only one carpet extractor is working properly.*
 - *Some staff have attendance issues.*

VI. WHITESTONE OUTREACH PROGRAM: THE FOUNDATION

January 2023 OVERVIEW

Assistance:

- *Outreach Totals of \$8,601.74 for a total of (7) members:*
 - *(7) long term members*
 - *(0) short term member (Emergency)*
- *WhiteStone residents receiving assistance (17)*
 - *(14) independent living*
 - *(3) memory care / assisted living*

New Referrals & Outreach:

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

If you know of a member needing assistance, please contact:

Jenna Grant
Director of Fraternal Friendship
Email: jgrant@meshhome.org
Phone: (336) 601-5593.

VI. WHITESTONE FINANCE REPORT

Accounts Receivable write offs for 2023 totaled – 357k with the below breakdown:

- *Managed – 134k*
- *MCR A – 82k (of which 43k was never collectible due to a billing error with the system and the daily rate it billed)*
- *MCR B – 40k*
- *Coins from Ins – 24k*
- *Outpatient Bs – 52k*
- *Private pay – 26k (of which 7k was a foundation resident that passed, and we are still working to recoup some of these funds & 16k that was in the process of being put into an Unmet Medical Needs agreement, but resident passed beforehand)*

** Attached is also details from the audit by Sharon at LCS Reliance as it relates to reasons and trends of which we have corrected most if not all these situations and issues. **

The current AR primary area is Medicaid. I along with a couple of staff did training with another community on February 1, 2024, so that we can get these new Medicaid residents caught up. We have successfully filed all billings for 1 resident on that list and all claims are set to pay. A deadline of February 16th has been given to the accounting department to get all these outstanding resident claims filed.

Capitalization of the project has been completed and any outstanding invoices owed to vendors are being finalized in February for payment and these have been accrued as of 12/31/2023.

Nikki is still working with BNY on account reconciliations given change in trustee and payoff of 2020B2 bonds. We have also implemented a system of notification when any payments are sent. Certificate of Completion on the project was submitted and approved by BNY. No funds have been invested in treasury funds as the 2020B1 bonds should be able to be paid by end of Q2 2024 if not before.

The escrow account with Truist (formerly BB&T) has been closed and funds have been transferred to the operating account.

Year-end audits and filings will be the focus until the May board meeting. As a reminder of the annual reports completed see below:

- *Annual Audited Financial Statements*
- *Annual Disclosure Statement Compilation*
- *990 Tax Return*
- *Cost Report (Medicare and Medicaid)*
- *401k Audit & 5500 Retirement Tax Return (much appreciation has Tracy does most of this)*

VII. WHITESTONE FOOD & BEVERAGE

IL Dining Room A La Carte

We've gotten busier than ever on our A La Carte cook line and have been working with the Cooks on ticket times and menu item consistency. Chef Kyle has been spending time on the line to improve on these metrics. I did the same while Kyle was on vacation in January.

IL Storage/Office Space

We've located additional storage and office space in the Bennette building and are working on getting these spaces ready to occupy. This will allow us to store our paper and catering ware in a dedicated space and create more private and quiet office space for our leadership.

IL Kitchen Projects

Our General Contractor has repaired the fiberglass reinforced panels in our IL kitchen coolers, providing a cleanable surface. We are also asking him to install dish racks in our dish room to help accommodate our increased volume.

Cost of Goods

January food costs are expected to come in under budget, per our declining balance sheet. Food costs have remained relatively stable throughout most of the year, and we plan to continue this trend in 2024.

Job Checklists

We are working on updating our job specific checklists and cleaning schedules for each position. This will help with our onboarding as well as continuous daily cleaning and maintenance.

Smallware

We are working on sourcing some new smallware to enhance our presentation of marketing events as well as buffets and celebrations within the campus. This will help make our spreads more aesthetically pleasing, leading to increased satisfaction and the "wow" factor.

IL Kitchen stock position

We're working on creating an additional utility position to help keep our kitchen organized and clean. This position will be dedicated to putting away and rotating stock, as well as detailed cleaning projects.

VIII. WHITESTONE COMMUNITY LIFE SERVICES REPORT

Staffing Updates:

- *Stable with current employees*
- *Have the following positions open (will hire for these as I get the green light):*
 - *1 full time in Assisting Living (holding off on hiring for this until we admit more residents to Assisted Living)*
- *Claire Johnson started on Monday, February 5th – Assisted Living Position*
- *Sarah Kate Myers (part time) - coming to fill out her new hire paperwork on February 2nd*

Independent Living Programming:

- *Total Number of Activities: 71*
- *Total Number of Sessions: 186*
- *Total Number of Cancellations: 8 (due to Covid)*
- *Total Participation: 2317*
- *Average Participation: 12.5 (~13)*
- *Participation Percentage: 89.1%*
 - *65/73 activities had participants*
- *Total number of check-ins: 342*

Changes since November:

- *Total Number of Activities decreased by 2 (2.7% decrease)*
- *Total Number of Sessions decreased by 1 (0.5% decrease)*
- *Total Participation decreased by 55 (2.4% decrease)*
- *Average Participation decreased by 1.2 (11.0% decrease)*
 - *(Note: Average = Total Participation/Total Number of Sessions)*
- *Participation Percentage increased by 0.4%*
- *Resident Participation increased by 5%*
- *Total Number of Check-Ins increased by 30 (9.6% increase)*
- *7 Sessions of Intergenerational Activities (Chess with Students, intergenerational scrapbook)*

Other Items:

- *2024 and making plans.*
- *Family Day Planning for May 2024*
- *I plan to Audit the One Call Now List against our current resident list in Independent Living to make sure we have all residents in there.*
- *Chili Cook Off on 2/20/24 – money raised will go to the Alzheimer's Association.*
- *Veterans Day Planning committee to meet next week (2.12.24) to begin making plans for the Veterans Day program here at WhiteStone*
- *Dog Obedience Training – have several residents interested in someone coming to their homes to train their dogs – investigating this and who to contact.*

- *Working on overnight trip in May to the Outer Banks and the Lighthouses through Holiday Tours – Leave Monday, May 13th and return Wednesday, May 15th. Will get to see 5 lighthouses, Cape Hatteras, Bodie Island, Currituck, Roanoke River, Manteo and visit the Wright Brothers Museum. We currently have 26 on the list – we must have a minimum of 30 to take the Holiday Tours Bus.*
- *Working on an overnight trip in the fall – closer to Christmas – to the Biltmore House in Asheville – residents wish to see the Chihuly Exhibit there and to see Biltmore decorated for Christmas.*
- *Continuing to focus on new IL residents that are moving in – getting to know them, get them involved, etc.*
- *Working on uploading resident pictures to touchtown and in to Point Click Care as we get them (this is ongoing)*

IX. WHITESTONE CHAPLAIN & SPIRITUAL SERVICES REPORT

Sunday services: *4 Services*

Funerals officiated: *0*

Documented visits:

- *CWC – 37 (some with family present) (+2 hospital visit)*
- *IL - (+2 hospital visits)*
- *Employee – 0*

Weekly Bible studies/worship

- *CWC – 4 (1 canceled due to COVID precautions)*
- *AL – 5*
- *IL – 3*

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

Support Groups: *RISE (2 meetings), HOPEFUL (2 meetings)*

Miscellaneous: *attended IL coffees and other activities as able, continued card ministry, prepared articles for newsletters, provided grief support, made occasional lunch/dinner walk throughs to greet residents, meals with residents, Resident orientation*

Working on the following: *working on obtaining a small area for a meditation room open to all faiths, continued support group planning, encouraging volunteer opportunities, planning another panel for “difficult conversations”, planning another visit from Rabbi, planning Temple visit, Ash Wednesday*



WHITESTONE EXPANSION REPORT(S)

Construction Updates/Accomplishments January 2024:

- **Site Work/CWC/IL/AL:**
 - *All work is completed.*
 - *Contractor continues to address warranty items as they are presented.*
 - *Final close out with GC is in progress.*
- **Next Steps/Milestones:**
 - *Final Close Out*

Sales Updates/Accomplishments:

- *EOM community occupancy will be 85% (181/212); Sold to 95% (201/212)*
- *January expansion sales will close the month at 66 (98.5%)*
- *Sales for January:*
- *3 expansion sales*
- *3 existing*
- *1 expansion cancellation (HLOC)*
- *11 units in total are available on campus. (0 Villa, 3 Cottages, 2 luxury apartments, 6 residential apartments)*
- *WhiteStone continues to focus on one large educational presentation per month as well as encouraging personalized community experiences through lifestyle activities and community dining opportunities with current residents.*
- *WhiteStone is seeing continued support from existing residents and families with Friends and Family referrals.*

Upcoming Events:

- *The Sales and Marketing Team has a focus on creating engaging and unique opportunities for prospects to highlight the lifestyle available as a WhiteStone resident.*
 - *February 8th: Prospect Presentation*
 - *February 21st: New Resident Orientation*
 - *February 28th: Diamond Dining Wait List*



February 2024

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

WhiteStone
A MASONIC & EASTERN STAR
COMMUNITY  EST. 1912

Founded on fellowship. Inspired by you.

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

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VISIBILITY FEBRUARY 2024

WHITESTONE COMMUNITY VISIBILITY – LEADERSHIP:

DATE(S):	MEETING(S)/EVENT(S)
Weekly:	<i>Women’s Coffee – Fellowship Hall 9am-10:30am, Wednesdays</i>
Weekly:	<i>Men’s Coffee – Fellowship Hall 9am-10:30am, Fridays</i>
Weekly:	<i>Wine Down – Fellowship Hall 3:30pm-5pm, Fridays</i>
Monthly:	<i>Masonic Luncheon – 1st Tuesday of every month</i>
February 22 nd	<i>Resident Council Meeting</i>

WHITESTONE FRATERNAL VISIBILITY

DATE(S):	MEETING(S)/EVENT(S)
Monthly:	<i>Masonic Luncheon at WhiteStone [1st Tuesday] Main Dining Room</i>
Monthly:	<i>MESH Chapter #379 Meeting [1st Tuesday] Fellowship Hall</i>
Monthly:	<i>MESH Lodge #771 Meeting [2nd Saturday] Fellowship Hall</i>
February 6 th	<i>OES Finance Committee Meeting</i>
February 10 th	<i>MESH Lodge Meeting</i>
February 23 rd & 24 th	<i>Wilkerson College</i>

WHITESTONE RESIDENTS: COMMITTEES, SERVICES & SUPPORT

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

DATE(S):	MEETING(S)/EVENT(S)
Monthly:	WhiteStone Resident Committee: Environmental Services (Building & Grounds) 2 nd Monday
Monthly:	WhiteStone Resident Committee: Campus Care Alliance [3 rd Tuesday]
Monthly:	WhiteStone Resident Committee: Auxiliary [3 rd Wednesday]
Monthly:	Resident Council Meeting [3 rd Thursday] Fellowship Hall
As Needed:	WhiteStone COVID Task Force
February 9 th	Resident Advisory Committee Meeting

WHITESTONE BOARD OF DIRECTORS: COMMITTEES, SERVICES & SUPPORT

DATE(S):	MEETING(S)/EVENT(S)
February 9 th	Resident Advisory Committee Meeting
February 9 th	Committee on WhiteStone Tour & Presentation
February 9 th	Board Dinner
February 10 th	Quarterly Board Of Directors Meeting

LIFECARE SERVICES [LCS]: SERVICES & SUPPORT

DATE(S):	MEETING(S)/EVENT(S)
February 1 st	Susan Brewer site visit
February 9 th	Jacob Elliott site visit
February 13 th	LCS Team at WhiteStone & Tour
February 13 th	LCS Team & WhiteStone Leadership Team Dinner
February 14 th	LCS / WhiteStone Blueprint

WHITESTONE EXPANSION: PROJECT(S) & REPORTING

DATE(S):	MEETING(S)/EVENT(S)
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WHITESTONE TECHNOLOGY INFRASTRUCTURE: PROJECT(S) & REPORTING

DATE(S):	MEETING(S)/EVENT(S)
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WHITESTONE NEW RESIDENT: PROSPECTING EVENT(S):**DATE(S): MEETING(S)/EVENT(S)****Monthly:** *New Resident Orientation [3rd Wednesday]***WHITESTONE EMPLOYEE: FEBRUARY ANNIVERSARIES**

SERVICE DATE:	EMPLOYEE NAME:	DEPARTMENT	YEARS OF SERVICE:
2/2	<i>Tywanda Burgess</i>	<i>Nursing</i>	<i>1 year</i>
2/2	<i>Patricia Turner</i>	<i>Security</i>	<i>1 year</i>
2/2	<i>Catherine Contreras</i>	<i>CLS</i>	<i>17 years</i>
2/3	<i>Tina Burdick</i>	<i>Nursing</i>	<i>2 years</i>
2/3	<i>John Combs</i>	<i>Security</i>	<i>2 years</i>
2/3	<i>Tina Harris</i>	<i>Nursing</i>	<i>2 years</i>
2/16	<i>Mara Garcia</i>	<i>Food & Beverage</i>	<i>1 year</i>
2/16	<i>Kia Payne</i>	<i>Nursing</i>	<i>1 year</i>
2/16	<i>Naisa Suarez</i>	<i>Nursing</i>	<i>1 year</i>
2/17	<i>Monica Hurd</i>	<i>Marketing</i>	<i>2 years</i>
2/19	<i>Oluwakemi Orekunrin</i>	<i>Nursing</i>	<i>16 years</i>
2/20	<i>Sierra Roberts</i>	<i>Health & Wellness</i>	<i>4 years</i>
2/21	<i>Comfort Adjei</i>	<i>Food & Beverage</i>	<i>13 years</i>

WHITESTONE EMPLOYEE: RECOGNITION, RECRUITMENT, & RETAINMENT:**DATE(S): MEETING(S)/EVENT(S)****Bi-Weekly** *New Hire and General Orientation***February 2nd** *National Wear Red Day***February 9th** *SuperBowl & Pizza Party***February 14th** *Valentines Day Chocolate Fountain***February 28th** *WhiteStone Staff Talent Show*



KEY PERFORMANCE INDICATORS – FEBRUARY 2024

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

YTD Net Sales IL	Budget of 2 with actual net sales at 9.
YTD NOI	Actual of 173,183 on budget of (79,537), a positive variance of 252,719.
YTD REVPOR	REVPOR budget of 5,550 with actual 6,398.
IL MTD Occupancy	Average occupancy of 180.72 on budget of 177.50.
YTD IL Closings	Budget of 6 with actual closings of 16.

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

HC MTD Occupancy	Average occupancy for the month at 76.14 with budget at 77.36.
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RED *Light Key Performance Indicators [KPI's]: Summary of Findings –*

Memory Care MTD Occupancy	Residents have not yet moved into memory care neighborhood as of February.
YTD EXPPOR	EXPPOR YTD budget at 6,663 with actual 6,854.
AL MTD Occupancy	Averaged 10.52 occupied for the month on a budget of 16.5.
Days in AR	Total AR 1,188,544 with 20% of total 90 days outstanding. Benchmark is 15%.



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

During the month of February, WhiteStone continued to experience a small number of COVID-19 cases across campus. This includes residents in both IL and CWC testing positive. We will continue to closely monitor the impact of the virus on our campus and provide updates as necessary.

Because those we care for in the Care and Wellness Center are typically at greater risk, we are following more stringent safety guidelines. Due to the increase in respiratory illness in the greater Greensboro community, staff, visitors, and family members that enter the CWC are required to wear a mask.



WHITESTONE LEADERSHIP TEAM: DIRECTORS REPORT

DIRECTOR NAME	DEPARTMENT
<i>Mrs. Tracy Armwood, SPHR</i>	<i>Director, Human Resources</i>
<i>Mr. Robert Reese</i>	<i>Director, Environmental Services</i>
<i>Mr. Rick Berkimer</i>	<i>Director, Plant Operations</i>
<i>Mr. Josh Hillegass, LNHA</i>	<i>Health Services Administrator</i>
<i>Ms. Marie Dunn</i>	<i>Director, Marketing & Sales</i>
<i>Mrs. 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 & Chaplain</i>
<i>Ms. Nikki Stafford</i>	<i>Director, Finance</i>
<i>Mr. Jonathan Szarke</i>	<i>Director, Food & Beverage</i>
<i>Ms. Archana Patel</i>	<i>Executive Assistant</i>
<i>Mr. Ray Robinson</i>	<i>Assisted Living Manager</i>

I. WHITESTONE HEALTH CENTER ADMINISTRATION REPORT

FEBRUARY 2024 OVERVIEW:

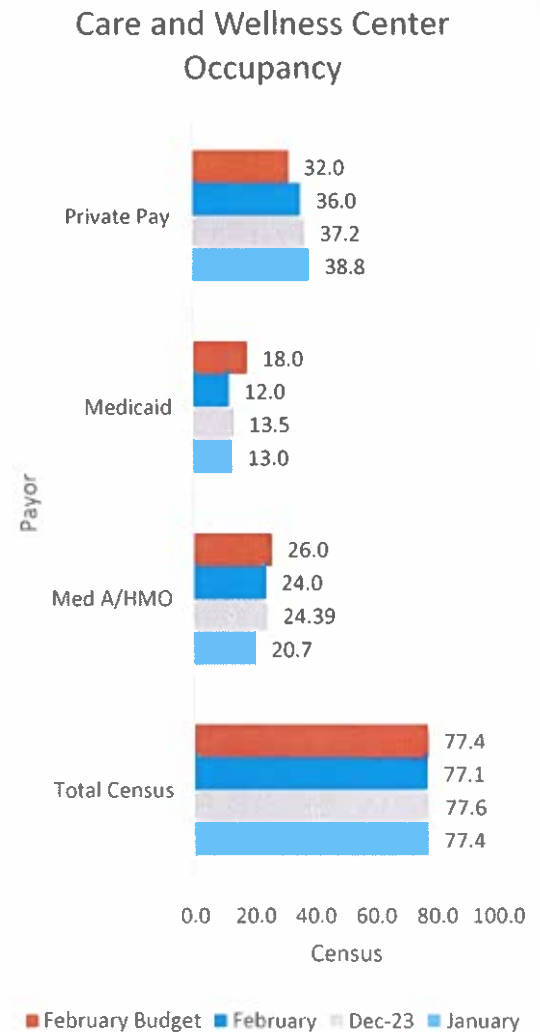
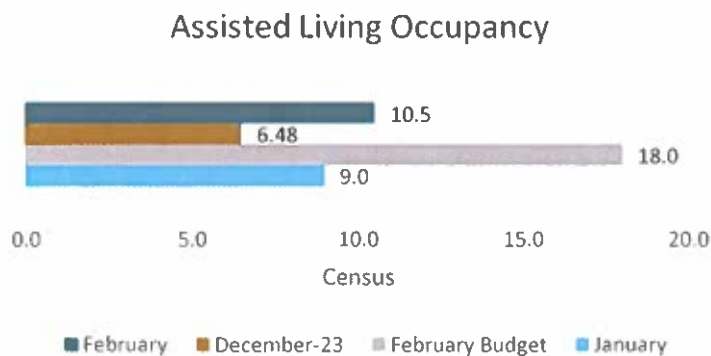
Our recruitment of the Director of Clinical Services continues. Our Team continues to focus on finding the best candidate for our Community. We have had several interviews with candidates, but we unfortunately have not found the right candidate yet. We're hopeful that we'll continue to source great candidates through our own recruitment and the assistance of our recruiting firm. During this transition period, it is our priority to find the best individual to lead our Clinical Team in our Health Center, while still maintaining high quality resident care and hospitality.

With the addition of Ray Robinson, Assisted Living Manager, to our Team, we have had a heightened focus on our Assisted Living Census Growth. Ray has jumped in headfirst to our Team, has begun making connections across the WhiteStone Community, and is working to identify and converse with those individuals that could benefit from an Assisted Living Level of Care. We're hopeful that with Ray's leadership, we'll begin to increase our Assisted Living Census moving into March and onwards.

Census Updates:

Our Care and Wellness Center maintained a strong focus on Census in the Month of February. We continue to meet our budgeted Census goal but came just shy of our Medicare/Managed Care budgeted goal. Our Short-Term Rehabilitation Program continues to grow, and our referral sources continue to grow alongside it. I'm hopeful that we'll continue to see strong occupancy and an increased growth in our Medicare/Managed Care Payors.

Over the past month, we have maintained a similar occupancy in Assisted Living. We did have our 11th Move In during the Month of February. As stated earlier, our Team is hopeful that with the addition of Ray Robinson, we'll begin to see momentum pick up in March and moving forward in regard to Assisted Living Occupancy.



Clinical Updates:

Crystal Condy, Staff Development Coordinator, has stepped into the role of our Interim Director of Nursing while we continue to search for the right candidate. Crystal brings great experience from her current role, and she has served as an Interim Director of Nursing in the past at other Communities. We want to express our gratitude to Crystal for stepping into this role, and we thank her for the work she has already done in her short time.

Ellie Kaviani has accepted the role of our Minimum Data Set (MDS) Coordinator effective 3/4/2024. Ellie has been a Registered Nurse for WhiteStone for several years. Ellie has served in several roles during her time at WhiteStone, but we're excited about the opportunity to further develop her in the role as an MDS Coordinator. Ellie spent time previously with Cindy Nsiah, our previous MDS Coordinator, learning about the role. We are looking forward to Ellie's continued growth with WhiteStone and are excited to have her with us!

II. WHITESTONE ASSISTED LIVING & MEMORY CARE REPORT

Last months overview

The month of February consisted with finding a leadership team for assisted living and memory care. The AL department hired a manager and identified a part time LPN to oversee the clinical needs of the residents. The current census was eleven with one move in to be determined. The team accomplished filing the first floor of assisted living which resulted in a 33% census on the road to 90% for the total community goal.

In addition to establishing a census, assisted living and memory care has been able to fully staff the first floor and start to comprise a plan to fill the second and third floors. Aiming to add 2-3 residents to the memory care unit is among the next goal of the AL team. The group has identified a myriad of potential residents who are appropriate for the service provided on the third floor. Activities and dietary staff are currently in place to meet the overall needs of providing care in the memory care unit.

Accomplishments for the month

Assisted living has been able to work to increase census while keeping the "back door" closed for unnecessary discharges. Increasing staff education and understanding of outliers that work to hurt the census and lifestyles of residents. We had our first official staff meeting in service on topics like incident reporting and documenting in progress notes.

Hosting a full list of activities geared to highlighting the benefits to assisted living among the chief accomplishments of the team. To include such programs as wine down and therapeutic music sessions lead by a host of volunteers and staff. We are excited to offer even more opportunities to chat about the needs and wants of residents in assisted living and memory care.

Plans for the next month

Assisted living and memory care looks to increase census while also educating staff on the importance of resident centered care in the following month. Our current laurels include the following:

- *AL/C is working toward three admissions in the month of March. As we aim to hit the 90% mark these are census needs in both AL and MC.*

- Increase education and protocol for documentation by auditing current residents and improving the admissions process.
- Developing a staff structure to withstand the added census and opening of MC unit.

Issues and Concerns

There are four overarching problems impeding the progress in the assisted living and memory care community. Without constant focus on the following items the team will experience difficulties in accomplishing organizational goals. The four issues are listed below.

- Closing the gap on clinical review of resident needs (order, medications, and PCP visits)
- Staff schedulings and changes in schedule due to needs across the community
- Staff access to communication and updating of resident conditions
- Meeting with ombudsman and county monitor to develop relationships

III. WHITESTONE HUMAN RESOURCES REPORT

February 2024 OVERVIEW

Turnover

5.63% turnover YTD 2024. Compared to 3.31% through February 2023.

Overtime:

990.31 hrs of OT for February. Compared to 809.19 hrs for February 2023. An increase of 181.12 hrs on the month and total YTD increase in overtime from last year by 444.17 hrs.

Workers Compensation:

We have recently been informed that Kathleen Church whose worker comp claim was denied has retained an attorney. We do have an assigned attorney to work with us on this case. There are no further updates currently.

EEOC & Legal Updates:

In both EEOC open cases we are still awaiting a response from the EEOC after the submission of our position statements. Both cases have recently been moved the Charlotte District due to staffing issues.

Budgeted FTEs:

Total February FTEs: 207.56

Total Budgeted FTEs: -228.85

Variance: -21.29 FTEs **UNDER** budget.

Over Budgeted FTEs:

Servers – Overbudget by 0.86 FTEs

Cooks – Overbudget by 1.70 FTEs

Maintenance – Overbudget by 0.61 FTEs

MONTHLY TURNOVER		
	2024	2023
Jan	2.23%	2.89%
Feb	3.40%	0.41%
Mar		4.68%
Apr		2.16%
May		2.62%
Jun		2.04%
Jul		4.35%
Aug		5.77%
Sep		2.94%
Oct		3.62%
Nov		1.05%
Dec		2.11%
TOTAL	5.63%	34.64%

Housekeepers – Overbudget by 1.31 FTEs

Job Openings Report:

Reported on: 3.4.24

IMMEDIATE OPENINGS

Job Title	# of Openings	New Candidate Pipeline	Attempting to Contact	Interviews Scheduled	Offers Pending
Charge Nurse - 2nd shift Fulltime	3	6	3	1	
Charge Nurse - 2nd shift Part time	1	3		1	
Charge Nurse - 3rd shift Fulltime	2				
Charge Nurse - 3rd shift Part time	1	3			
CNA - 1st shift Full Time	1				
CNA - 2nd shift Fulltime	4				
Nurse Supervisor - 3rd shift Full time	1				
MDS/Infection Preventionist	1	2			
Sous Chef	1	6			
Server FT	1	6	3		
Lead Server FT	1	2		1	
Utility FT	1	30			
Housekeeping	1	6	1	3	
Dining Room Manager	1	22	11	1	
Director of Nursing and Clinical Services	1	5			
CDM - Health Center Dietary Manager	1				
Security 1st & 2nd PRN	1	4	1	1	
total openings:	23			Total Offers:	0
				Interviews Scheduled:	8
		Openings after Offers:	23		
Ready for Orientation:		5 news hires for 2/29/24			

Recruiting:

- *February 2024: 21 New Candidates*
- *42 Scheduled interviews*
- *10 offers with 7 hires.*

We are entering the spring job fair season. Below are the many scheduled events we have planned.

- *Guilford Works Carrer Fair 3/13*
- *High Point University 3/14*

- *GTCC 2/27*
- *WhiteStone Onsite Job Fair 4/4*

Our biggest challenge is in the recruitment of RNs. Below are few things we are currently implementing.

We will be hosting in March FREE CEU workshops for RNs as a way to bring them to campus for a class and opportunity to introduce them to WhiteStone.

We will be increasing our Employee Referral program for RNs only to \$2,000 per referral. This will be paid for a successful hire over the course of one year. We have no employee referrals at this time.

We have a plan to actively recruit agency nurses with the goal to transition them to our team.

Retention:

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

- *National Social Work Month*
- *Emp Appr. National Potato Chip Day – 3/14*
 - *Chip and dip bar!!*
 - *Group Fitness Room; 2pm – 4pm*
- *St. Patrick’s Day – 3/17; Wear your green*
- *World Down Syndrome Day – Wear your Crazy Socks! – 3/21*

Recommendations and/or Other Information:

For 2024 our big focus is retention. We do have strong candidate flow in all positions with the exception of RNs. We are working to enhance the department onboarding experience to continue to reduce turnover.

IV. WHITESTONE MARKETING & SALES REPORT

Monthly Marketing Report February 2024

Current Occupancy:	183 / 211	87%
Sold Occupancy:	198	94%

Available Units:	<u>Villa</u>	<u>Cottage</u>	<u>IL Apts</u>	<u>Res Apts</u>
	1	1	5	6

Explanation:	<u>Villa</u>	<u>Cottage</u>	<u>IL Apts</u>	<u>Res Apts</u>
	3 SRC	6-D	324, 432, 433 315, 322	144 Ben 146 Ben 241 Ben 343 Ben 346 Ben 349 Ben

Sales:	4	221, 422, 6-H, 2-D (907 FMD)	Cancel:	1	324
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Move-In: (Feb)	8	434, 114, 309, 521 431, 218, 107, 332	Upcoming MI:	233	534
				220	411
				321	318

Transfers:				334	221
				426	422
				416	6-H

MO (Feb):	5	262, 3 SRC, 433, 315 322, 907 FMD		705 RL	2-D
				907 FMD	

Upcoming MO:	<u>Unit</u>	<u>reason</u>	<u>Est MO</u>	<u>Otell</u>
	244	HLOC	3/2/2024	

Upcoming Events:	3/6/2024	Diamond Dining: Wait List (moved)
	3/12/2024	Lunch & Learn: Tax Benefits
	3/13/2024	New Resident Orientation
	3/27/2024	Letters From Home

Department Highlights: Upgrading marketing materials for professional presentation.
Improve overall community presentation with branded materials.
Increase catering efforts for clean, professional presentations.

V. WHITESTONE PLANT OPERATIONS / ENVIRONMENTAL SERVICES REPORT

PLANT OPERATIONS

January 2024 Activities

- *Completed CWC life/safety inspection by AHJ.*
- *Scheduled main kitchen flooring review with contractors. Completed bidding process. Vendor StonHard selected to complete necessary work in early March.*
- *Met with resident representatives to discuss wood shop at Gay Terrace.*

Accomplishments for February 2024

- *Completed annual fire alarm testing and inspection with Modern Systems.*
- *Completed clean up and organization of the maintenance shop and Linville storage areas.*
- *Architect provided with plans for main dining build to facilitate design plans for the walk in cooler installation. Quotes received from Caterpillar and Cummins for generator replacement. Currently waiting for Generac to provide their quote before making a vendor decision and moving forward with CWC generator replacement.*
- *Month-end work order count at 25 work orders*

Plans for March 2024

- *Complete contract with TK elevator that includes the new AL building.*
- *Complete contract with pest control contract that includes the new AL building.*
- *Push forward with kitchen flooring repair/replacement project. Vendor selected and scheduled for 3 March and will be complete before kitchen needs to open on 4 March for breakfast.*
- *Begin clean-up/organization of IL West 1st floor storage area (Attic stock room)*
- *Near month-end celebration with Plant Ops team for work order reduction progress made over the first 3 months of 2024R.*

Issues & Concerns

Wood working shop at Gay Terrace cannot be completed at this time due to costs associated with making the structure ready for public (resident) use. Fire Marshall requirements exceed the planned budget significantly. Additionally, we received a stop work order from the city regarding past work that has been completed in the building without a permit.

ENVIROMENTAL SERVICES

January 2024 Activities:

- *Conducted the following in-services with all staff.*
 - *No fault attendance policy recap!! (Always)*
 - *Read your handbook!*

- If you sign up for lunch & don't pick it up. You will be able to sign up for a while.
- Went over the Hospitality Promise.
- The word "Snitch or Snitches is band, please don't use.
- Break Times: 9:30 am-9:45; lunch is 12:00pm-12:30pm/ 12:30pm-1:00pm.
- Went over the following Leadership Codes:
 - Respect Everyone etc.
 - Territorial behavior etc.
 - We all have value.

Accomplishments for February 2024

- *Hire two new staff members.*
- *Moving forward with unified dispensers across the campus*

Plans for March 2024:

- *Retirement party for Kimberly Rouse*
- *Continue working with staff updating on & off schedules.*
- *Training all staff on customer service towards each other, residents, and guests*
- *Interviews*

Issues and Concerns:

Hiring proper staff for our community (Housekeeping & laundry staff)

VI. WHITESTONE OUTREACH PROGRAM: THE FOUNDATION

February 2023 OVERVIEW

Assistance:

- *Outreach Totals of \$8,925.94 for a total of (7) members:*
 - *(7) long term members*
 - *(0) short term member (Emergency)*
- *WhiteStone residents receiving assistance (17)*
 - *(14) independent living*
 - *(3) memory care / assisted living*

New Referrals & Outreach:

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

If you know of a member needing assistance, please contact:

*Jenna Grant
Director of Fraternal Friendship
Email: jgrant@meshhome.org
Phone: (336) 601-5593.*

VII. WHITESTONE FINANCE REPORT

Medicaid AR – at January month end Medicaid AR was 387k and the over 90 was 216k. As of today, AR is 124k and over 90 is 40k. A reduction of 263k. We do have 3 residents that have not received approval for benefits yet and Josh is working to make sure all information is remitted for those. 1 resident received approval on 3/4/2024 but no ID number has been assigned yet.

Accounts Receivable continues to be a focus. Josh and Nikki have been working to implement procedures for Medicaid applications, LTC Insurance filings, Outpatient Therapy, & Discharge planning.

The 2020B1 bonds were called to be paid on 3/1/2024. This was the second set of bonds that entrance fees from the expansion were obligated for and the first set the 2020B2 bonds were paid 11/1/2023.

ONGOING -- Year end audits and filings will be the focus until the May board meeting. As a reminder of the annual reports completed see below:

- *Annual Audited Financial Statements*
- *Annual Disclosure Statement Compilation*
- *990 Tax Return*
- *Cost Report (Medicare and Medicaid)*
- *401k Audit & 5500 Retirement Tax Return (much appreciation has Tracy does most of this)*

Empower – the official letter to Empower regarding the 2019, 2020 and 2021 compliance testing around profit sharing contributions has been sent certified mail to Empower’s General Counsel. No update regarding the receipt of the letter is available currently.

VIII. WHITESTONE FOOD & BEVERAGE

IL F&B Service manager

We have accepted Dani Valentine’s resignation and are recruiting for this position. We have several strong candidates and are planning on deciding soon.

IL Storage/Office Space

We have additional storage and office space in the Bennette building and are working on getting these spaces ready to occupy. This will allow us to store our paper and catering ware in a dedicated space and create more private and quiet office space for our leadership.

IL Kitchen Floor

We had a contractor repair the kitchen floor in two areas that were heavily pitted. We are planning to replace the floor in its entirety later.

ServSafe

Front line staff that don't hold their Food Handlers certification will be testing on 3/6/24. We also have several others taking their manager certification.

Small wares

We are working on sourcing new, small wares to enhance our presentation of marketing events as well as buffets and celebrations within the campus. This will help make our spreads more aesthetically pleasing, leading to increased satisfaction and the "wow" factor.

IL Kitchen Stock position

We are working on creating an additional utility position to help keep our kitchen organized and clean. This position will be dedicated to putting away and rotating stock, as well as detailed cleaning projects.

IX. WHITESTONE COMMUNITY LIFE SERVICES REPORT

Staffing Updates:

- *Stable with current employees*
- *Have the following positions open (will hire for these as I get the green light):*
 - *1 full time in Assisting Living (holding off on hiring for this until we admit more residents to Assisted Living)*

Independent Living Programming:

- *Total Number of Activities: 83*
- *Total Number of Sessions: 185*
- *Total Number of Cancellations: 1*
- *Total Participation: 2357*
- *Average Participation: 12.7 (~13)*
- *Participation Percentage: 86.7%*
 - *72/83 activities had participants.*
- *Total number of check-ins: 316*

Changes since December:

- *Total Number of Activities decreased by 12 (16.9% increase)*
- *Total Number of Sessions decreased by 1 (0.5% decrease)*
- *Total Participation increased by 40 (1.7% increase)*
- *Average Participation increased by 0.2 (1.6% increase)*
 - *(Note: Average = Total Participation/Total Number of Sessions)*
- *Participation Percentage increased by 2.4%*
- *Total Number of Check-Ins decreased by 26 (7.6% decrease)*
- *5 Sessions of Intergenerational Activities (Chess with Students, intergenerational scrapbook)*
- *Total February Volunteer hours: 226.05 (9.42 days volunteered)*

Other Items:

- *2024 and making plans.*
- *Family Day Planning for May 2024*
- *I plan to Audit the One Call Now List against our current resident list in Independent Living to make sure we have all residents in there.*
- *Chili Cook Off was held on 2/20/24 – We raised \$910 and the money raised will go to the Alzheimer’s Association.*
- *Veterans Day Planning committee to meet monthly to begin making plans for the Veterans Day program here at WhiteStone*
- *Working on an overnight trip in the fall – closer to Christmas – to the Biltmore House in Asheville – residents wish to see the Chihuly Exhibit there and to see Biltmore decorated for Christmas.*
- *Continuing to focus on new IL residents that are moving in – getting to know them, get them involved, etc.*
- *Working on uploading resident pictures to touchtown and in to Point Click Care as we get them (this is ongoing)*
- *Farmer’s Market to start end of March every other week – on site at WhiteStone.*
- *Working on keeping email list updated for CWC families.*

X. WHITESTONE CHAPLAIN & SPIRITUAL SERVICES REPORT

Sunday services: 4 Services and Ash Wednesday service

Funerals officiated: 0 (attended 1)

Documented visits:

- *CWC/AL – 60+ (some with family present) (+2 hospital visit)*
- *IL – 35+*
- *Employee – phone calls, etc. (2 different persons)*

Weekly Bible studies/worship

- *CWC – 4*
- *AL – 4*
- *IL – 5*

Support Groups:

- *RISE – 2 meetings*
- *HOPEFUL – 2 meetings*

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

Miscellaneous: *attended IL coffees and other activities as able (Valentine’s Day), continued card ministry, prepared articles for newsletters, provided grief support, made occasional lunch/dinner walk throughs to greet residents, meals with residents, Resident orientation*

Working on the following: working on obtaining a small area for a meditation room open to all faiths, continued support group planning, encouraging volunteer opportunities, planning another panel for “difficult conversations”, planning another visit from Rabbi, planning Temple visit, Easter.



WHITESTONE EXPANSION REPORT(S)

Construction Updates/Accomplishments February 2024:

- **CWC/IL/AL-MC:**
 - All work is completed.
 - Contractor continues to address warranty items as they are presented.
 - Final close out with GC is in progress and nearing completion.
- **Next Steps/Milestones:**
 - Final Close Out

Sales Updates/Accomplishments:

- EOM community occupancy will be 87% (184/212); Sold to 94% (198/211)
- February expansion sales will close the month at 64 (96%)
- Sales for January: 4
- 13 units in total are available on campus. (1 Villa, 1 Cottages, 5 luxury apartments, 6 residential apartments)
- WhiteStone continues to focus on one large presentation per month. WS rotates focus between Senior Community Industry Education and a true WhiteStone101. The team continues to encourage personalized community experiences through lifestyle activities and community dining opportunities with current residents.
- WhiteStone is seeing continued support from existing residents and families with Friends and Family referrals.

Upcoming Events:

- The Sales and Marketing Team has a focus on creating engaging and unique opportunities for prospects to highlight the lifestyle available as a WhiteStone resident.
 - March 6th: Diamond Dining :Wait List (reschedule)
 - March 12th: WhiteStone presentation – Tax Benefits of Life Plan Communities
 - March 13th: New Resident Orientation
 - March 27th: WS Lifestyle experience: Letters from Home



March 2024

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

WhiteStone
A MASONIC & EASTERN STAR
COMMUNITY  EST. 1912

Founded on fellowship. Inspired by you.

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

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VISIBILITY MARCH 2024

WHITESTONE COMMUNITY VISIBILITY – LEADERSHIP:

DATE(S):	MEETING(S)/EVENT(S)
Weekly:	<i>Women’s Coffee – Fellowship Hall 9am-10:30am, Wednesdays</i>
Weekly:	<i>Men’s Coffee – Fellowship Hall 9am-10:30am, Fridays</i>
Weekly:	<i>Wine Down – Fellowship Hall 3:30pm-5pm, Fridays</i>
Monthly:	<i>Masonic Luncheon – 1st Tuesday of every month</i>
March 1 st	<i>Welcome Reception for Ray Robinson</i>
March 1 st	<i>Staff Talent Show</i>
March 8 th	<i>Health & Wellness Nurse(s) Welcome Reception</i>
March 18 th	<i>Resident Town Hall Meeting</i>
March 28 th	<i>Resident Council Meeting</i>

WHITESTONE FRATERNAL VISIBILITY

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

WHITESTONE RESIDENTS: COMMITTEES, SERVICES & SUPPORT

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

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

Monthly: *WhiteStone Resident Committee: Food & Beverage [2nd Thursday]*

Monthly: *WhiteStone Resident Committee: Environmental Services [Building & Grounds] 2nd Monday*

Monthly: *WhiteStone Resident Committee: Campus Care Alliance [3rd Tuesday]*

Monthly: *WhiteStone Resident Committee: Auxiliary [3rd Wednesday]*

Monthly: *Resident Council Meeting [3rd Thursday] Fellowship Hall*

As Needed: *WhiteStone COVID Task Force*

WHITESTONE BOARD OF DIRECTORS: COMMITTEES, SERVICES & SUPPORT

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

LIFECARE SERVICES [LCS]: SERVICES & SUPPORT

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

March 12th *Susan Brewer Site Visit*

March 22nd *LCS/WS Blueprint Follow Up #1 [Zoom Meeting]*

WHITESTONE EXPANSION: PROJECT(S) & REPORTING

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

WHITESTONE TECHNOLOGY INFRASTRUCTURE: PROJECT(S) & REPORTING

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

WHITESTONE NEW RESIDENT: PROSPECTING EVENT(S):

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

Monthly: *New Resident Orientation [3rd Wednesday]*

March 6th *Waitlist Diamond Dining Club*

March 12th *Tax Benefit Marketing Event*

WHITESTONE EMPLOYEE: FEBRUARY ANNIVERSARIES

SERVICE DATE:	EMPLOYEE NAME:	DEPARTMENT	YEARS OF SERVICE:
3/2	Latisha Clinard	Nursing	1 year
3/3	Venissa Adams	Nursing	2 years
3/3	David Clapp	Food & Beverage	2 years
3/3	Basema Darwish	Food & Beverage	2 years
3/13	Kimberly Rouse	Environmental Servies	23 years
3/15	Mark Lewis	Executive Director	6 years
3/16	Arvin Fitzgerald	Food & Beverage	1 year
3/16	Joshua Hillegass	Nursing	1 year
3/16	Tracy Sliva	Health & Wellness	1 year
3/17	Willie Foggie	Nursing	2 years
3/18	Lindsay Billings	Business Services	3 years
3/23	Anya Fulmore	Food & Beverage	1 year
3/25	Janice Rodriguez	Assisted Living	28 years
3/25	Shanay Wilson	Nursing	11 years
3/27	Betty Reese	Food & Beverage	22 years
3/31	Toshima Dabbs	Nursing	2 years
3/31	Hayley House	Food & Beverage	2 years

WHITESTONE EMPLOYEE: RECOGNITION, RECRUITMENT, & RETAINMENT:

DATE(S):	MEETING(S)/EVENT(S)
Bi-Weekly	New Hire and General Orientation
March 1 st	Staff Talent Show
March 11 th – 15 th	Human Resources Professionals Week
March 14 th	Chip & Dip Bar
March 18 th – 22 nd	Marketing Professional Week



KEY PERFORMANCE INDICATORS – MARCH 2024

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

YTD NOI	Actual of 165,360 on budget of (423,445), a positive variance of 588,805.
YTD REVPOR	REVPOR budget of 5,629 with actual 6,300.
YTD EXPPOR	EXPPOR YTD budget at 6,710 with actual 6,696.
YTD IL Closings	Budget of 9 with actual closings of 21.
YTD Net Sales IL	Budget of 3 with actual net sales at 16.
IL MTD Occupancy	Average occupancy of 185.09 on budget of 175.50.

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

HC MTD Occupancy	Average occupancy for the month at 75.81 with budget at 77.25.
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RED *Light Key Performance Indicators [KPI's]: Summary of Findings –*

Memory Care MTD Occupancy	Averaged 1.75 on budget of 6.5
AL MTD Occupancy	Averaged 11.23 occupied for the month on a budget of 19.5.
Days in AR	22% of total AR 90 days outstanding. Benchmark is 15%.



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

Due to the decreasing prevalence of respiratory illnesses within the Greater Greensboro Community, the Care and Wellness Center will no longer mandate the usage of face masks while visiting. WhiteStone joins other Regional Health Systems in the Greater Greensboro Area in changing our mask policy.



WHITESTONE LEADERSHIP TEAM: DIRECTORS REPORT

DIRECTOR NAME	DEPARTMENT
<i>Mr. Mark Lewis, LNHA</i>	<i>Executive Director</i>
<i>Mr. Josh Hillegass, LNHA</i>	<i>Health Services Administrator</i>
<i>Mr. Ray Robinson</i>	<i>Assisted Living Manager</i>
<i>Mrs. Tracy Armwood, SPHR</i>	<i>Director, Human Resources</i>
<i>Ms. Marie Dunn</i>	<i>Director, Sales & Marketing</i>
<i>Mr. Rick Berkimer</i>	<i>Director, Plant Operations</i>
<i>Mr. Robert Reese Sr.</i>	<i>Director, Environmental Services</i>
<i>Mrs. Jenna Grant</i>	<i>Director, Fraternal Friendship Program</i>
<i>Ms. Nikki Stafford</i>	<i>Director, Finance</i>
<i>Mr. Jonathan Szarke</i>	<i>Director, Food & Beverage</i>
<i>Mrs. Gina Prevost, LRT/CTRS</i>	<i>Director, Community Life Services</i>
<i>Mrs. Misty McAden</i>	<i>Director, Spiritual Services & Chaplain</i>
<i>Ms. Archana Patel</i>	<i>Executive Assistant</i>

I. WHITESTONE HEALTH CENTER ADMINISTRATION REPORT

March 2024 OVERVIEW:

I'm excited to announce that Crystal Condy has accepted our role as the Director of Clinical Services. Crystal has been with our team since June of 2023 as the Staff Development Coordinator, but more recently as the Interim Director of Clinical Services. Please find a short biography for Crystal below:

I am originally from West Virginia and moved to North Carolina with my family 16 years ago. I have been a Registered Nurse for over 18 years. I spent the first 17 years of my career working in the ICU. I finished my BSN in 2019, MSN in Nursing Education in 2020, and an Executive in Nursing Educational Leadership in 2022. I am currently writing my dissertation for my PhD in Nursing Education at Liberty University. I hope to finish by the end of the year. I recently moved to High Point from Snow Camp. I have 5 children: 26, 24, 23, 21, and 17. I have one granddaughter who is 7 months old. My late husband was a Mason in Siler City. He was so proud to be a Mason. He would have also been proud of me taking this role at WhiteStone. I started at WhiteStone in June 2023 as the Staff Development Coordinator. I look forward to working with all the staff and residents as the Director of Clinical Services.



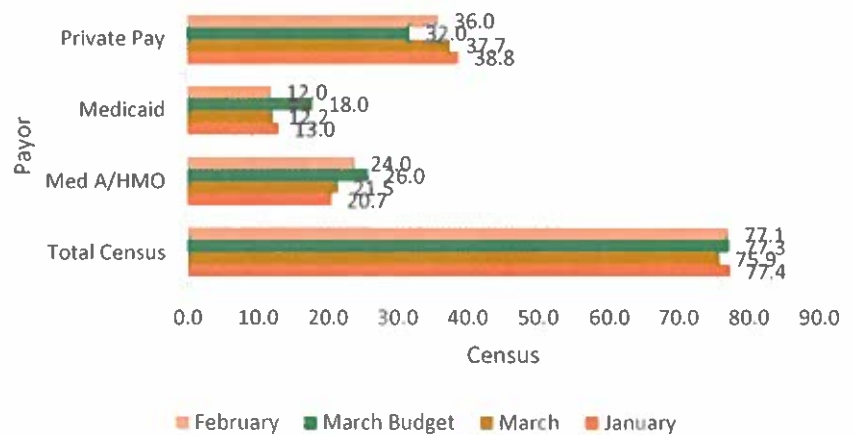
Crystal is in the Care and Wellness Center, and she can be reached via phone at 336-510-4807, or via email at ccondy@liveatwhitestone.org.

On 3/6/2024, the Care and Wellness Center had our revisit from our Life Safety Survey. I'm happy to report that our revisit went as planned, and the Care and Wellness Center has had all deficiencies cleared and back in compliance.

Census Updates:

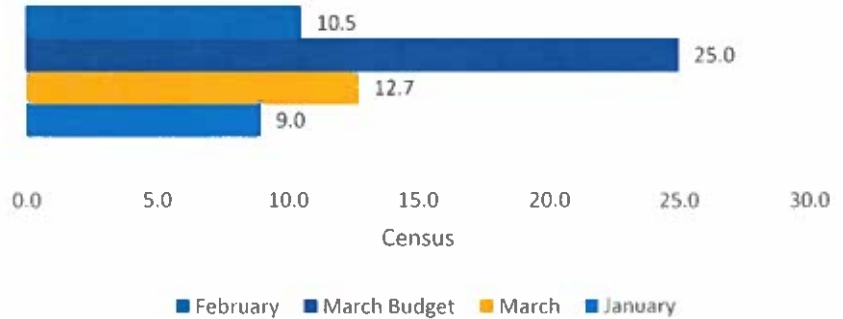
The Care and Wellness Center had another strong month for census, despite some challenges that our team was faced with. As you can see, our overall census for this month was lower than our budget for the first time this year. Despite the strong admissions we had during the month, we unfortunately had several of our long-term Residents pass away during the month of March. We wish them and their family peace during these challenging times. As such, we'll be working in the coming months to rebuild our long-term census that creates a strong base for our overall census.

Care and Wellness Center Occupancy



Assisted Living census continues to grow month over month. While we are still trailing behind our budget for this level of care, we as a team are beginning to pick up momentum. With the addition of Ray Robinson, Assisted Living Manager, we have continued to grow and expand our knowledge base around Assisted Living as well as providing education to our Residents on the benefits of this level of care. We're hopeful that this momentum will continue to compound as we move forward.

Assisted Living Occupancy



Clinical Updates:

Toshima Dabbs, RN, has accepted the role of our 2nd Shift Supervisor in the Care and Wellness Center. Toshima has been a part of our WhiteStone Team since March of 2022, and she has served in several roles during her time as both a Charge Nurse and our Staff Development Coordinator. We're thankful for the leadership and expertise she brings to this role, and we look forward to the impact she'll have on our team in the evenings!



Holly Bernard, Social Services Coordinator, has submitted her resignation notice, effective 4/11/2024. Holly has been with WhiteStone since 2006, and we thank her for her many years of service to our Community. We wish Holly the best of luck in her new role. With Holly's upcoming departure, our Community is actively recruiting a Social Worker to replace Holly following her last day on April 11th. I'm pleased to announce that we've had a strong interest in this role, and we hope to have this role filled with an excellent candidate soon.



Due to the decreasing prevalence of respiratory illnesses within the Greater Greensboro Community, the Care and Wellness Center will no longer mandate the usage of face masks while visiting. WhiteStone joins other Regional Health Systems in the Greater Greensboro Area in changing our mask policy. We continue to maintain strict infection control and surveillance programs to ensure the continued health and safety of our Residents.

II. WHITESTONE ASSISTED LIVING & MEMORY CARE REPORT

Last months overview

March focused on building a census for Assisted Living. The month yielded six commitments and five move-ins, which allowed the memory care to open for the first time in recent WhiteStone history. We hosted the Auxiliary committee and built a broader and more comprehensive understanding of what assisted Living means at Whitestone. Building a culture for the new assisted living facility is among the chief concerns of the AL operations committee, which meets weekly to cultivate relationships among staff, residents, and families.

In addition to establishing a census, Assisted Living and memory care have been able to staff the first floor fully and comprise a plan to fill the second and third floors. Aiming to add 2 to 3 residents to the memory care unit is among the next goals of the AL team. The group has identified many potential residents appropriate for the services provided on the third floor. Activities and dietary staff are currently in place to meet the overall needs of providing care in the memory care unit.

Accomplishments for the month

Assisted Living has been able to confirm seven signed contracts and six move-ins in the month of March. Four of the move-ins were in our memory care community, where we are working to service staff on the needs facing residents in this environment.

We continue to host a complete list of activities geared toward highlighting the benefits of assisted Living, which is among the team's chief accomplishments. These include programs such as musical performances and devotions led by volunteers and staff. We are excited to offer even more opportunities to chat about the needs and wants of assisted living and memory care residents.

Plans for the next month

Assisted living and memory care is looking to increase the census while educating staff on the importance of resident-centered care in the following month. Our current laurels include the following.

AL/MC is working toward three admissions in March. As we aim to hit the 90% mark, there are census needs in both AL and MC.

- *Increase education and protocol for documentation by auditing current residents and improving the admissions process.*
- *Developing a staff structure to withstand the added census and opening of the MC unit.*

Issues and Concerns

There are five opportunities for the assisted living and memory care community. With constant focus on the following items, the team will experience success in accomplishing organizational goals. The five items are listed below.

- *Training staff on the daily requirements of operating a thriving assisted living and memory care community.*
- *Staff schedules and changes in schedule due to needs across the community.*
- *Staff access to communication and updating of resident conditions.*
- *Meetings with ombudsman and county monitor to develop relationships.*
- *Creating protocols to circumvent the growing pains of developing AL/MC*

III. WHITESTONE HUMAN RESOURCES REPORT

March 2024 OVERVIEW

Turnover

9.06% turnover YTD 2024. Compared to 7.99% through March 2023.

Overtime

914.94 hrs of OT for March. Compared to 642.72 hrs for March 2023. An increase of 272.22 hrs on the month and total YTD increase in overtime from last year by 1385 hrs.

Workers Compensation

We have recently been informed that Kathleen Church whose worker comp claim was denied has retained an attorney. We do have an assigned attorney to work with us on this case. There are no further updates at this time.

EEOC & Legal Updates

In both EEOC open cases we are still awaiting a response from the EEOC after the submission of our position statements. Both cases have recently been moved the Charlotte District due to staffing issues. No update at this time.

Budgeted FTEs

Total March FTEs: 201.68

Total Budgeted FTEs: -228.85

Variance: -27.20 [FTEs UNDER budget]

Over Budgeted FTEs

Cooks – Overbudget by 1.38 FTEs

Housekeepers – Overbudget by 0.60 FTEs

Dietary Aides – Overbudgeted by 0.57 FTEs

Recruiting

We are excited to announce that our Staff Development Coordinator, Crystal Condy has accepted the role as Director of Nursing. Our biggest challenge is in the recruitment of Nurses, RNs and LPS. We will be looking into raising the nurse wage scale. We have lost several nurses due to lower than expected wages.

Recruiting summary for March 2024

- 502 New Candidates
- 84 Scheduled interviews
- 25 offers with 19 hires.

Retention

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

- National Autism Day – 4/2, Staff to wear blue
- Onsite Careers and Coffee and Staff Appreciation – 4/4, The Grinder Coffee Truck onsite all day
- PNC Employee Financial Wellness Class – 4/10

<u>MONTHLY TURNOVER</u>		
	2024	2023
Jan	2.23%	2.89%
Feb	3.40%	0.41%
Mar	3.44%	4.68%
Apr		2.16%
May		2.62%
Jun		2.04%
Jul		4.35%
Aug		5.77%
Sep		2.94%
Oct		3.62%
Nov		1.05%
Dec		2.11%
TOTAL	9.06%	34.64%

- National Picnic Day – 4/23, Staff Picnic on the Lawn
- National Pretzel Day – 4/26, Pretzels, Beer Cheese and Mustard for all staff

Recommendations and/or Other Information

For 2024 our big focus is retention. We do have strong candidate flow in all positions with the exception of RNs. We are working to enhance the department onboarding experience to continue to reduce turnover.

Job Openings Report:

Reported on: 4/7/24					
IMMEDIATE OPENINGS					
Job Title	# of Openings	New Candidate Pipeline	Attempting to Contact	Interviews Scheduled	Offers Pending
Charge Nurse - 1st shift Part time	1	1	7	3	
Charge Nurse - 2nd shift Fulltime	2	1	8	1	1
Charge Nurse - 2nd shift Part time	1				
Charge Nurse - 3rd shift Fulltime	1				
Charge Nurse - 3rd shift Part time	1	2	3		1
CNA - 1st shift Full Time	2	58	67	15	1
CNA - 1st shift Part Time	2	58	67		1
CNA - 2nd shift Fulltime	2	58	67		1
CNA - 2nd shift Part time	2	58	67		1
CNA - 3rd shift Part Time	1	58	67		1
Staff Development/RN - FT	1	2	2	1	
MDS - PT	1	0	0	0	
Nurse Supervisor - 3rd shift Full time	1				
Health Center Social worker	1	1	1	2	1
Sous Chef	1	1	12	4	2
Utility FT	1	1	11	2	1
CDM - Health Center Dietary Manager	1	1	0	3	1
Security 3rd shift PT	1	1	12	3	
total openings:	23			Total Offers:	12
				Interviews Scheduled:	34
			Openings after Offers:	11	
Ready for Orientation:	11 news hires for 4/11/24				

IV. WHITESTONE MARKETING & SALES REPORT

Monthly Marketing Report March 2024

Current Occupancy:	187/211	89%
Sold Occupancy:	202	96%

Available Units:	<u>Villa</u>	<u>Cottage</u>	<u>IL Apts</u>	<u>Res Apts</u>
	0	0	2	6

Explanation:	<u>Villa</u>	<u>Cottage</u>	<u>IL Apts</u>	<u>Res Apts</u>	
			315 ,324	144 Ben	343 Ben
				146 Ben	349 Ben
				241 Ben	
				244 Ben	

Sales:	6	433, 3 SRC, 432 Benn 346, 322, 6-D	Cancel:	
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Move-In: (March)	5	318, 334, 220, 426 416	Upcoming MI:	422	411
				321	221
				433	6-H
Transfers:				233	2-D
				322	907 FMD
				705 RL	3 SRC
MO (March):	1	Benn 244,		Benn 346	432
				534	6-D

Upcoming MO:	<u>Unit</u>	<u>reason</u>	<u>Est MO</u>
	145	HLOC	
	110	HLOC	
	432	changed mind	4/13/2024
	2-A	HLOC	4/19/2024

Upcoming Events:	4/18/2024	Resdient Panel
	4/24/2024	NRO

Department Highlights: Roadmap to 95% in IL

V. WHITESTONE PLANT OPERATIONS / ENVIRONMENTAL SERVICES REPORT

PLANT OPERATIONS

Accomplishments for March 2024

- *Main kitchen flooring repairs completed.*
- *Completed updates to Resident Handbook*
- *Completed contract with TK elevator that added AL elevators to contract*
- *Completed pest control contract with Bug-Out that added AL pest control to contract.*
- *Plant Ops team enjoyed a celebration of first quarter accomplishments. Most notable is the reduction of open work orders from a daily average of ~90 open work orders to an average of less than 50 (low of 29 during the month). The entire team went to lunch and bowling as a group.*

Plans for April 2024

- *Put main kitchen cooler project out for bid.*
- *Select generator contractor to replace CWC generator.*
- *Begin clean-up/organization of IL West 1st floor storage area (Attic stock room) (based on team availability/work order status)*

Issues & Concerns

- *Major preventive maintenance work while continuing to address work orders and various small projects in April is going to stress the capacity of the Plant Ops team.*
- *3 of 8 of the maintenance staff will be entirely focused on PM's for the majority of the month.*

ENVIROMENTAL SERVICES

March 2024 Activities

Conducted in-services with staff.

- *No fault attendance policy recap!! (Always)*
- *Department Vision & Goals for 2024 (Always) Staff Read*
 - *Department Vision: To build a partnership with the community to have a clean, safe & positive environment for all individuals who meet our staff here at Whitestone.*
 - *Department Goal: To hire and sustain adequate staffing to support the department vision & the Whitestone Community.*
- *Continuing Customer Service Care towards our residents & staff*
- *Introduction of new staff: Brittaney Rucker; Sakia Drayton; Crystal Conaway & Alex Osacitas.*
- *If you resign from Whitestone, you must put in a two week notice or you forfeit your PAL.*
- *Announcements Family Day May 11th need volunteers coming soon.*
- *Positive work Environment.*

- *Safety topic for the department from Walter.*
- *Go over the Employee Handbook.*
- *Staff meeting every Wednesday@7:15am.*
- *Theme Day Friday's staff coming up with Ideas.*

Accomplishments for March 2024

- *Employee appreciation events*
- *Pizza and Breakfast was purchased throughout the month.*

Plans for April 2024

- *Continue working with staff updating on & off schedules.*
- *Training all staff on customer service towards each other, residents, and Guest.*
- *Sample Uniforms are arriving soon for staff to vote.*

Issues and Concerns

- *Hiring proper staff for our community (Housekeeping & laundry staff)*
- *Several staff members still have attendance issues.*

VI. WHITESTONE OUTREACH PROGRAM: THE FOUNDATION

February 2023 OVERVIEW

Assistance:

- *Outreach Totals of \$8,868.44 for a total of (7) members:*
 - *(7) long term members*
 - *(0) short term member (Emergency)*
- *WhiteStone residents receiving assistance (18)*
 - *(14) Independent Living*
 - *(3) assisted Living*
 - *(1) Memory Care*

New Referrals & Outreach:

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

If you know of a member needing assistance, please contact:

Jenna Grant
 Director of Fraternal Friendship
 Email: jgrant@meshhome.org
 Phone: (336) 601-5593.

VII. WHITESTONE FINANCE REPORT

Accounts Receivable continues to be a focus. Josh and Nikki have been working to implement procedures for Medicaid applications, LTC Insurance filings, Outpatient Therapy, & Discharge planning. Areas of Focus for AR currently are still Medicaid but more focusing on the residents that are pending as all approved residents have been caught up and filed but we have a couple pendings that are taking a while to get approved. We did training on NC Tracks and in a recent conversation with Ray Robinson he knows someone that I've asked if we could have lunch so I can try and get some guidance on better and more efficient procedures. As of today preliminary AR for March has Medicaid at 122k and over 90 at 40k which is primarily 1 pending resident. I have made some edits to census that may change this for 2 other pending residents when we officially close March. Private Pay has an over 90 of 186k which is 40% of the total Private. 47k is from 2 residents that we are slowly working on payments with. Part of this is also related to the census change for Medicaid Pending as well. Prelim March has 1.19M in AR and 272k in over 90 which is 23% of total AR. These are preliminary numbers until we close the month. Managed Care and Medicare claims are remaining current for the most part.

The 2020B1 bonds were called to be paid on 3/1/2024. This was the second set of bonds that entrance fees from the expansion were obligated for and the first set the 2020B2 bonds were paid 11/1/2023. – There was slight delay in this payment as there are “call” requirements etc. we were able however by working with the single funder of these Bonds to pay them before end of March.

ONGOING -- Year end audits and filings will be the focus until the May board meeting. As a reminder of the annual reports completed see below:

- *Annual Audited Financial Statements – fieldwork is in the final stages and the audit committee meeting will be scheduled for the end of April*
- *Annual Disclosure Statement Compilation – this will be the next focus as it is due the end of May – kickoff call is scheduled for the second week of April and this should run much smoother now that the project is opened.*
- *990 Tax Return*
- *Cost Report (Medicare and Medicaid)*
- *401k Audit & 5500 Retirement Tax Return (much appreciation as Tracy does most of this)*

Empower – the official letter to Empower regarding the 2019, 2020 and 2021 compliance testing around profit sharing contributions has been sent certified mail to Empower's General Counsel. No update regarding the receipt of the letter is available currently. A representative from Empower did contact Tracy. I requested that Tracy have him reach out to me, but I have not heard anything.

WhiteStone has hired a Director of Information Technology. Ryan Hester who has worked with WhiteStone via TCS (3rd party IT company) for many years will be in orientation on May 9th. This is extremely exciting news for our community as we have never had an official IT employee of any capacity. I have worked in partnership with Ryan since I came to manage and grow the technology infrastructure at WhiteStone including items involved in our expansion. He has a great love for this community and has always felt like it was home. He has a great rapport with staff, is already aware of the infrastructure that is in place and how it needs to grow to

accommodate our community, he also has worked with residents and their families at my request as needed and it will be a benefit to have him available to assist residents with their IT needs as well.

VIII. WHITESTONE FOOD & BEVERAGE

CWC Kitchen Leadership

In the absence of a CDM, Greg Matthews has been overseeing our CWC kitchen as well as our AL Dining. We have found a candidate for the CDM position that is well qualified and presented well and are planning on moving forward with him.

IL F&B Service Manager

Jada Pinckney has started out strong in this role. She's been busy with onboarding, training, and making resident and staff connections.

IL Storage/Office Space

We're in the process of moving our storage and office space into the Bennette building. This allows us to store our paper and catering ware in a dedicated space and create more private and quiet office space for our leadership.

ServSafe

Most of the front-line staff that didn't hold their Food Handlers certification tested in March. We had several others obtain their manager certification.

IL Kitchen

Our IL Kitchen team has been hard at it this month, as we were missing a key member due to a Leave of Absence. The team has pulled together and done a great job, while not missing a beat taking care of events and daily production.

IX. WHITESTONE COMMUNITY LIFE SERVICES REPORT

Staffing Updates:

- *Stable with current employees*
- *Have the following positions open (will hire for these as I get the green light):*
 - *1 full time in Assisting Living (holding off on hiring for this until we admit more residents to Assisted Living)*

Independent Living Programming:

- *Total Number of Activities: 83*
- *Total Number of Sessions: 180*
- *Total Number of Cancellations: 2*
- *Total Participation: 2405*
- *Average Participation: 13.3 (~13)*
- *Participation Percentage: 90.4%*
 - *75/83 activities had participants.*
- *Total number of check-ins: 312*

Changes since February:

- *Total Number of Activities decreased by 0*
- *Total Number of Sessions decreased by 5 (2.7% decrease)*
- *Total Participation increased by 48 (2.1% increase)*
- *Average Participation increased by 0.6 (4.7% increase)*
 - *(Note: Average = Total Participation/Total Number of Sessions)*
- *Participation Percentage increased by 3.7%*
- *Total Number of Check-Ins decreased by 4 (1.3% decrease)*
- *6 Sessions of Intergenerational Activities (Chess with Students, intergenerational scrapbook)*

Other Items:

- *2024 and making plans.*
- *Family Day Planning for May 2024*
- *I plan to Audit the One Call Now List against our current resident list in Independent Living to make sure we have all residents in there.*
- *Veterans Day Planning committee to meet monthly to begin making plans for the Veterans Day program here at WhiteStone.*
- *Working on an overnight trip in the fall – closer to Christmas – to the Biltmore House in Asheville – residents wish to see the Chihuly Exhibit there and to see Biltmore decorated for Christmas.*
- *Continuing to focus on new IL residents that are moving in – getting to know them, get them involved, etc.*
- *Working on uploading resident pictures to touchtown and in to Point Click Care as we get them (this is ongoing)*
- *Farmer's Market to start end of March every other week – on site at WhiteStone.*
- *Working on keeping email list updated for CWC families.*
- *Lifelong Learning Opportunities – exploring this for our Blueprint Meeting*
- *Chit Chat and Care Center Connections every month*

X. WHITESTONE CHAPLAIN & SPIRITUAL SERVICES REPORT

Sunday services

- *4 regular Chapel services*
- *1 planned service with guest speaker while I was out on PTO*
- *1 Maundy Thursday service with communion*

Funerals officiated

- *1 co-officiated for Jean Ray*
- *1 planned/assisted with in Chapel with guest minister presiding for Ann Johnson*

Pastoral Encounters

- *CWC/AL – 48 (some with family present) (3 hospital visits)*
- *IL – 13*
- *Employee – 6 (phone calls, etc.)*

Weekly Bible studies/worship

- *CWC – 3 (1 cancelled)*
- *AL – 3 (1 led by resident)*
- *IL – 3 (1 cancelled due to PTO)*

Support Groups

- *RISE x2*
- *HOPEFUL x1*

Meetings

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

Miscellaneous

- *attended IL coffees and other activities as able.*
- *continued card ministry*
- *prepared articles for newsletters*
- *provided grief support.*
- *occasional lunch/dinner walk throughs to greet residents.*
- *meals with residents*
- *Resident orientation*
- *Town hall,*

Working on the following

- *planning a small area for a meditation room open to all faiths*
- *continued support group planning*
- *encouraging volunteer opportunities*
- *planning another panel for “difficult conversations”*
- *planning another visit from Rabbi*
- *planning Temple visit*
- *Seder meal demonstration scheduled April 17th*