

# WhiteStone Blueprint Review – Road to 95

February 14, 2024

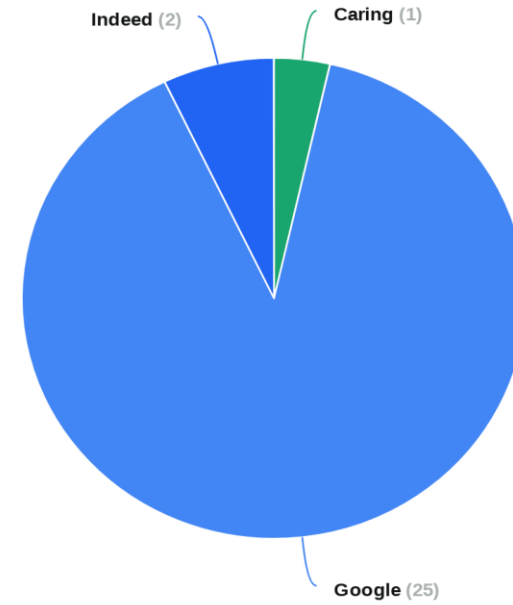
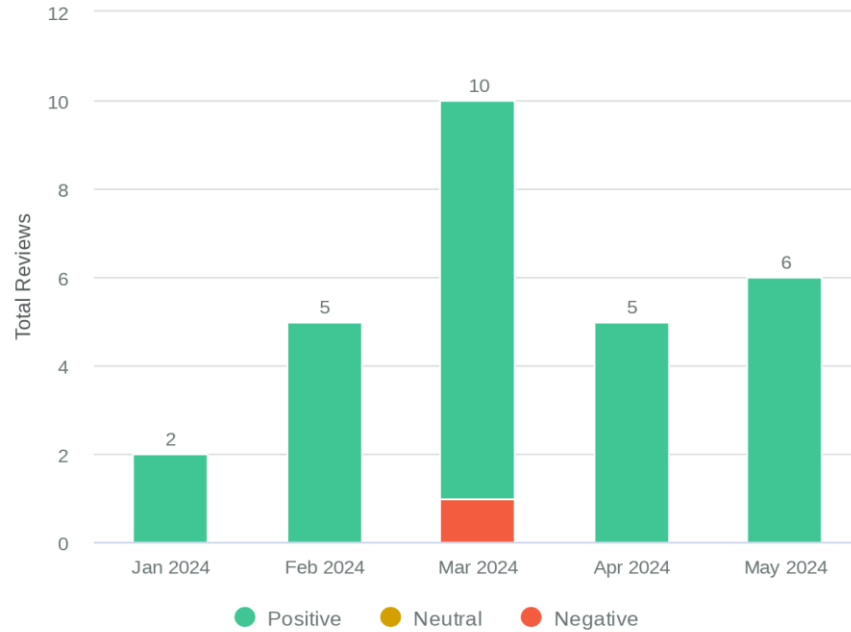
- Attended by more than 20 LCS and WhiteStone leaders representing all disciplines
- Reviewed our Trailhead (historical lookback)
- Established our Destination
  - Healthy NOI margin of 6% - 8% (11% - 15% w/ contributions)
  - Stable Occupancy (95%)
  - Cash Growth
- Developed Trail Map
  - Identified SWOT/business plan priorities to reach destination
- Established plan for accountability and execution
  - Monthly updates/check-ins to strategic plan to monitor progress and execution



# Key Priorities

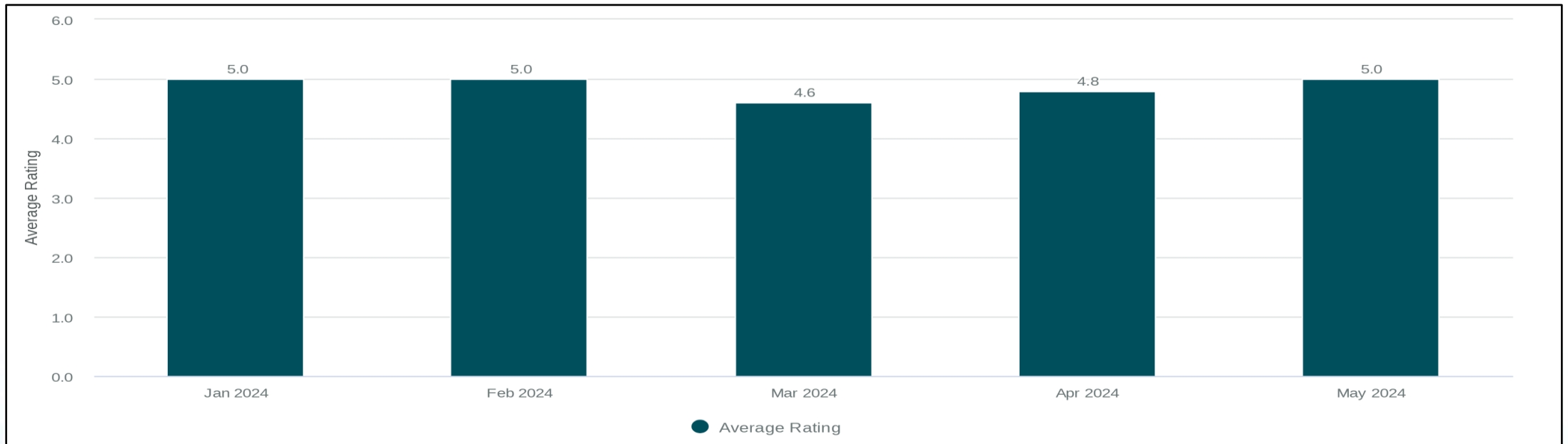
- Fill Assisted Living and Memory Care
- Stabilized IL Occupancy – 95%
- Competitive Analysis/Rate Review
  - 2<sup>nd</sup> person fees, CWC private pay rates, Type B modified benefits (30 days annually)
- Margin Growth
  - CWC margins, food, labor, controllable expenses
- Employee Retention and Recruitment
- 6 – 8 year plan for Latham and Bennett legacy apartments

# WS Reputation Summary



Year	Total Reviews	Overall Rating
2024	28 <span style="color: red;">4% Negative</span>   <span style="color: orange;">0% Neutral</span>   <span style="color: green;">96% Positive</span>	4.8 /5

# WS Reputation Summary



# 3<sup>rd</sup> Party Review Export



WhiteStone (2065)

Robert Dellorfono

Flagged

Responded

★★★★★ 5.0 /5 Apr 25, 2024

In the traditional Masonic philosophy, this place is devoted to brotherly and sisterly relationships regardless of whether you are a Mason or Eastern Star member. You truly feel like a family member soon after you join this continuous care facility.

Reviews

Mark Lewis replied on Apr 25, 2024 8:49 AM:  Live  
 Hi Bro. Dellorfono, thank you for taking the time to leave a review for us at WhiteStone! Guided by our fraternal values we are committed to fostering a culture of friendship and compassion. We're glad to hear we are delivering on this promise!



WhiteStone (2065)

Elliott Robinson

Flagged

Responded

★★★★★ 5.0 /5 Mar 13, 2024

My wife and I are extremely happy with our decision to move into WhiteStone! As we were making our decision as to which facility to choose, and after we decided that WhiteStone was where we should be, Monica and Meredith were both totally professional, helpful and patient as we bombarded them with question after question. As we began to settle in we had numerous occasions to request help from Rick and his staff in Maintenance. We were, and still are, amazed at how fast they respond and how quickly and professionally they get the job done. There are probably others but Joel and Amanda (and the gentleman with the white beard) are hereby commended for all that they've done for us, and always with a smile. Our praises to all of you!

- Happiness / Love
- Helpfulness
- Maintenance
- People
- Professionalism
- Quality
- Questions and Concerns
- Staff
- Staff Professionalism
- Timeliness / Speed

Mark Lewis replied on Mar 15, 2024 8:53 AM:  Live  
 Elliott Robinson, thank you for sharing your positive experience! We are happy to pass along your comments to the Team here at WhiteStone! Thank you again for the great review!



WhiteStone (2065)

laparish grier

Flagged

Responded

★★★★☆ 4.0 /5 Apr 24, 2024

I am an employee at Whitestone Assisted Living community and I truly enjoy my career here. The residents are just like family to me and I enjoy my time caring for each and everyone of them not to mention the incredible staff members that I work along with and the management team all the way from environmental services to activities it's always so much fun to be had. This beautiful facility is just filled with amazing love inside and out!

- Activities
- Appearance
- Comfort / Attractiveness
- Happiness / Love
- Overall Experience - General
- Staff

Mark Lewis replied on Apr 25, 2024 7:32 AM:  Live  
 Laparish, we appreciate your positive review! More importantly, we appreciate your dedication to those we serve! Thank you, and have a fantastic day!