

# SHANNONDALE WEEKLY UPDATE

## Steps Taken to Add Elected Residents Leaders to The Board of Directors

During the last two weeks in June a total of eight resident town hall meetings were held to brief residents, family members and individuals on the community waiting lists for independent living units about current developments at Shannondale. It is estimated that well over 90% of current residents attended. Over 30 waiting list members also attended. Separate town hall meetings for just waiting list members at each campus will be organized and held in the next 10-14 days. Verbally and in written questions and comments many residents and their advisors strongly recommended that Resident Leaders be appointed to serve as full voting members of the Corporation's Board of Directors.

In response to a strong consensus among residents at the town hall meetings, Suzy Garner Booker, Chair, Presbyterian Homes of Tennessee, Inc., Board of Directors, will place on the agenda of the Board of Directors, at its scheduled meeting on July 18, 2023, proposed amendments to the bylaws, that would require that the Chair, Buckingham Community Council (A Knoxville, Resident's Council) and the Chair, Shannondale of Maryville Community Association (A Maryville, Resident's Council) be appointed by position, as full voting members of the Board of Directors. Once approved by the full board, these amendments will ensure that an elected resident leader from each of the campuses will continuously serve on the Board of Directors of Presbyterian Homes of Tennessee, Inc.

# Weekly Dashboard

6 Week Trend

Total Occupied Units/Residents-Both Campuses	Units or Beds	6/2	6/9	6/16	6/23	6/30	7/7	
Independent Living-Units	337	314	314	315	316	317	317	↑
Assisted Living-Residents	89	89	45	45	45	45	46	↑
Skilled Nursing-Residents	250	250	140	145	150	143	148	↑

Occupancy Rate (%) - Both Campuses	Units or Beds	6/2	6/9	6/16	6/23	6/30	7/7	
Independent Living-Units	337	93.1%	93.1%	93.4%	93.7%	94%	94%	↑
Assisted Living-Residents	89	50.5%	50.5%	50.5%	50.5%	50.5%	51.6%	↑
Skilled Nursing-Residents	250	56%	58	60%	60%	57.2%	59.2%	↑

Total Full Time Equivalent Employees (FTEs)*	6/2	6/16	6/30	
Total	316	306	315	↓
Overtime (included in total above)	26	23	24	↓

\* Based on worked hours only

## Recent Accomplishments

### 1 New Website

Bids have been solicited for the design and maintenance of a new website. At a minimum the redesign will include the following suggestions from residents and staff:

- Provide photo, name, and a brief biography of all members of the Board of Directors
- Provide photo, name, and a brief biography all members of all members of senior leadership team for the corporation and at each campus.
- Provide a functional organization chart for the corporation and at each campus.
- Provide clear campus maps
- A description of each facility and service offered
- Floorplans for each independent living unit with pricing
- Virtual walkthrough of the campus and sample units
- One click accesses to news and Friday Updates
- A question portal to submit questions from staff residents and the public.
- We will keep you posted as this develops.

## 2 Town Halls

A total of 24 town hall meetings were held with residents and staff. Thank you all for participating. To keep information flowing in addition to our weekly updates resident town halls will be held on the first Wednesday (Maryville) and Thursday (Knoxville) at 10:00 AM, at the chapel in the Retirement Center (Maryville) and the Lodge (Knoxville) of every other month (six times per year). The first meetings will be on August 2 and 3 respectively at Maryville and Knoxville. The meetings will be conducted by the local campus leadership teams, who will work with the Resident Councils to develop the agenda which will be published in advance of the meetings.

## 3 Sale of the Knoxville Healthcare Center

The sale process is well underway. Our investment bankers, B.C. Ziegler & Co, have already received three letters of intent (two to purchase both the Healthcare Center and Well Park) and expect to receive two more next week. Prospective buyers will be touring the facilities next week. Keith McCord will coordinate details with staff.

Separately, our legal team is working on the necessary subdivision to enable the sale to take place. Included in the subdivision plans will be easements necessary to enable our Buckingham residents to still access Middlebrook Pike through the back gate.

## 4 Emergency Exit Doors for the Maryville Retirement Center

Bids have been solicited to correct an unsafe condition reported by the residents related to the nine emergency exits from the building. The current locking systems will be replaced with an emergency exit bar system. We would expect to have the work completed by the end of the month. David Maxwell and Dawn Daud are coordinating implementation.

## 5 New Proposed Monthly Fee Structure

The proposed monthly fee structure for new residents was implemented effective July 1, for residents that enter into residency agreements on or after that date.

The implementation of the proposed new fee structure for existing independent living residents and been postponed until September 1, 2023. To permit an additional 30 days to refine the proposal in response to issues raised by the residents at the various town hall meetings.

The new Self Pay fee structure for Assisted living and skilled nursing at Maryville was implemented July 1, 2023.

# Plans for Next Week

## 1 Management Reorganization

Senior Leadership will meet on Tuesday to consider a reorganization of management duties and responsibilities. The idea will be to streamline the structure and establish clear company-wide responsibilities for key functions.

## 2 Reduction in Force

Next week we will finalize the process for the conduct of the reduction in force which we expect to implement during the next two weeks.

## 3 Ability to Pay Policy

A draft policy describing the confidential process for handling applications for assistance by residents who are unable to pay the proposed increased monthly fees will be drafted and shared with the resident councils for review and comment.

## 4 Waiting List Town Hall Meetings

At least one for each campus will be scheduled and organized for the following week.

## 5 Resident Contracts

Residency contracts for all existing independent living residents will be collected and inventoried for inconsistencies between and among contracts.

Regulatory counsel will complete a draft of a framework for a new residency contract for NEW residents.

## Resident News

For Resident News please submit to the following individuals by 5:00 PM, Wednesday the week before publishing:

### Knoxville

Angie Schiller

email: Angie.Schiller@ShannondaleTN.org

865.690.3411 Ext. 511

### Maryville

Dawn Doud

email: Dawn.Doud@ShannondaleTN.org

865.982.4599 ext. 202

## Employee News

For Employee News please submit to the following individuals by 5:00 PM, Wednesday the week before publishing:

### Both Campuses

Linda Wolfenbarger

email: Linda.Wolfenbarger@ShannondaleTN.org

865.690.3411. ext. 113