

The Kendal Corporation is a not-for-profit organization committed to meeting the needs of older persons through communities and services provided in accordance with the principles of the Religious Society of Friends.

KENDAL[®] TOPICS

SUMMER 2006

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A Continuing Commitment

a message from John Diffey, President and Chief Executive Officer of The Kendal Corporation

This issue of Topics is about two requests for help, the huge challenges associated with each, the staff's persistence and skill in responding, the inspiration we found in our colleagues who had asked us to become involved with them, and ultimately, the successful outcomes.

These stories also serve to illustrate one of Kendal's key characteristics—a commitment to continue to reach out and grow in service. After all, that commitment is how Kendal began, it is why Kendal exists, and it is why we all have been drawn to live, work, give, and serve together here.

One might ask, "Why continue to look for additional opportunities to serve, why grow?" And indeed, it is certainly true that Kendal could have stopped so many times. The economic reasons for continuing to grow, though they exist to a degree, are not compelling. There are no stockholders. Every member of every Kendal board of directors serves without any monetary remuneration. And there is a natural hesitancy of people and organizations to reach beyond the comfortable and venture into the difficulty of starting yet another new activity from scratch.

The first of the two stories has its beginnings in the early 1990s, when Friends in Westchester County, New York, asked whether Kendal might be able to help them establish a retirement community there based on the Kendal model. They were distressed at the thought of having to leave the communities in which they had enjoyed living for decades and urged Kendal to become engaged with them.

The challenges were substantial. Together, we looked at over 125 sites, ran out of start-up capital twice, and spent over a decade bringing Kendal on Hudson into being. But today, only a year after opening, it is a beautiful, fully occupied, and thriving community.

The second story began to take shape in the late summer of 2005, as the first televised reports of the devastation in New Orleans appeared on TV screens. All across the world, people were shocked by the extent of the damage and by the apparent paralysis in the essential systems of emergency response. Almost instantly around the Kendal System, emails among staff in the various Kendal locations spread the news, described the horror, and—importantly—asked the question "Is there a way we can help?"

These two responses to need have resulted in two very important success-stories and are tremendous accomplishments—reflecting the inspiring commitments of Friends in Westchester County and our colleagues at Lambeth House in New Orleans as well as the hard work of Kendal. On a deeper level though, these responses are about one of the most important and defining characteristics of the Kendal culture—a continuing commitment to help far beyond conservative self-interest.

It is that commitment, as much as any other, that defines Kendal and it is one of the most significant reasons why we have been drawn to Kendal to live, work, give, and serve together.

John Diffey

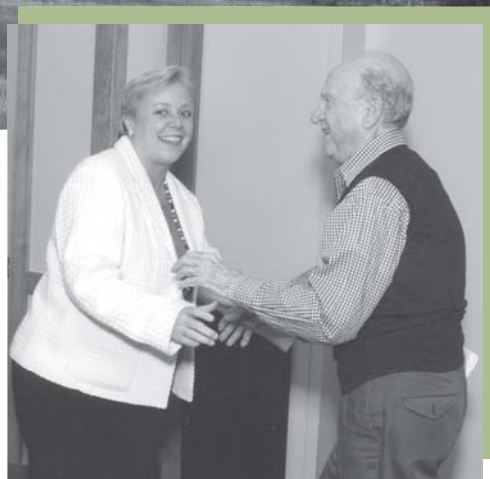


John Diffey speaking with participants at the 2006 White House Conference on Aging in Washington, DC.

Grand Opening Celebration at *Kendal on Hudson*



The Muskrat Band played on.....
and Terry Minervini, Director of Public Relations and
Marketing, danced with Nicholas DiSalvo, resident.



A Decade in the Making and Worth the Wait!—that was the theme of the festive October 2005 ceremonies celebrating the opening of the Kendal on Hudson community in Sleepy Hollow, Westchester County, New York. The theme of the grand opening referred to the 10 years from start to finish that it took to develop and build the community.

Many in the enthusiastic crowd were among the first residents of this new Kendal community. Ruth Dewey, at right, who was the first person to sign up to live at Kendal on Hudson, was a featured speaker.

The \$150 million Kendal on Hudson project began in 1995 when a group of Quakers from the Purchase Quarterly Meeting of the Society of Friends brought The Kendal Corporation and Phelps Memorial Hospital Center together to discuss the possibility of building a continuing care retirement community on the Phelps campus. In 1996, Kendal on Hudson, a not-



for-profit organization, was established to build, own, and operate the community on land leased from the hospital. Ground was broken in 2003 and construction was completed in 2005.

The Hudson River, a focal point for the community, is visible from every building. The 20-acre campus is designed with four buildings of varying heights, architecturally compatible with Hudson riverfront towns and connected by enclosed walkways. Common areas include dining rooms, an indoor swimming pool, recreational and fitness facilities, crafts and hobby spaces, a computer center and library, auditorium, banking office and beauty/barber shop, plus a wellness center with offices for doctors, nurses, and other health service providers.

A riverfront promenade, which is open to the public, connects to trails at Rockwood Hall, part of the Rockefeller State Park Preserve immediately north of the community.



Guests and dignitaries were welcomed by Patricia Doyle, Executive Director of Kendal on Hudson (center). Left to right: Andy Spano, Westchester County Executive; John Diffey, President and CEO, The Kendal Corporation; Phillip E. Zegarelli, Mayor of the Village of Sleepy Hollow; Pat Doyle; Gay Berger, past board chair and founder of the Study Group for Retirement Alternatives; Maarten van Hengel, Chair of the Kendal on Hudson Board of Directors; Ruth Dewey, resident; and Keith Safian, President and CEO of Phelps Hospital.



Residents Robert and Doris Randall.



Andy Spano, Westchester County Executive, and Betty Amico, Kendal on Hudson Executive Assistant.

As part of the grand opening celebration, Kendal on Hudson presented a check for \$30,000 to Dr. Alix Schnee, manager of Rockwood Hall State Park Preserve.

“On behalf of Governor George Pataki and New York State Parks Commissioner Bernadette Castro, I am delighted to accept this contribution toward the future of Rockwood Hall,” said Dr. Schnee. Kendal on Hudson and Rockwood Hall State Park Preserve share a property line and two walkways from Kendal connect to trails in the park. Residents and visitors enjoy fine old specimen trees and views of the Hudson.

Patricia Doyle, Executive Director of Kendal on Hudson said, “We consider Rockwood Hall a great treasure for our residents and for all who live in this area. Our gift comes with the hope that this extraordinary landscape will continue to be preserved for future generations to enjoy.”



Left to right: Patricia Doyle, Executive Director of Kendal on Hudson; Dr. Alix Schnee, Manager of Rockwood Hall State Park Preserve; and Maarten van Hengel, Chair of the Kendal on Hudson Board of Directors.

Some Forward Thinking—



The 2006 Kendal System All Communities Gathering gets underway in the Kendal at Ithaca auditorium.



Joseph Coughlin, Director of AgeLab at the Massachusetts Institute of Technology and featured speaker, with John Diffey.

New technologies...Disruptive demographics... Innovation and change...

This year's Kendal System All Communities Gathering took a long look toward the future and what it might hold for the retirement and continuing care field. One hundred and twenty-eight representatives from all Kendal affiliates gathered at Kendal at Ithaca to celebrate achievements, share news, and consider how Kendal might address changes and opportunities that may present themselves in the years ahead.

John Diffey, President and CEO of The Kendal Corporation, spoke for the group when he said, "We are indeed fortunate to participate in a system with shared values and a track record of growth, success, collegue-ship, and fellowship of residents, board, and staff."

Bill Rogers, chair of The Kendal Corporation Board of Directors, challenged participants' thinking by offering some new words for the acronym Continuing Care Retirement Community—"how about Centeredness, Compassion, Realism, and Creativity to address emerg- ing needs and desires in our field?" he asked.

Two featured presentations offered valuable analy- ses of current trends and demographics and also much information on new technologies and "out-of-the-box" ideas being readied for the consumer of the future.

Trends in Continuing Care Communities, presented by Tom Brod, Managing Director, and Steve Jeffrey, Senior Vice President of Ziegler Senior Living Finance Group, explored the growing popularity of active adult com- munities and community-based (in home) services. the speakers also profiled the coming surge of an estimated 76,000,000 members of the baby boom generation as they reach retirement age. A great proportion of the "boomer" group values residence models stressing wellness and activity.

Strategic Innovation and Disruptive Demographics, presented by Joseph Coughlin, Director of AgeLab at the Massachusetts Institute of Technology, offered an intriguing look at innovative projects already in the works to address changing population profiles. The speaker explored the nature of innovation and outlined some of the key behaviors that allow organizations to



Dinner and socializing at the Cornell Laboratory of Ornithology.



Prioritizing ideas for future programs and directions.

at 2006 Kendal System All Communities Gather-



Barclay Friends focus group at work.

move innovatively.

Lively small group discussions and brainstorming on specific topics filled out the remainder of the day's sessions. The gathering attendees, comprised of executive directors, leaders of the affiliates' residents associations, and board members, met for dinner at the Cornell Laboratory of Ornithology.

In his closing remarks on the following day, John Diffey reminded the gathering that "mission and values-centered conversations are the context in which we will make business decisions. We have a contract with society to serve. We need to consider how to best do this work from a business perspective while preserving our not-for-profit ideals, our tradition of excellence, and our Quaker heritage."

Both John Diffey and Bill Rogers suggested that Kendal's homework assignment has been given. "We will educate ourselves in detail and consider what leverage we might have to develop new initiatives, and to explore partnerships that might yield pilot projects in new and useful directions."



Kendal at Lexington break-out session.



Harriet Stone (center), chair of the Kendal at Granville Board of Trustees displays the Senior Housing Council award with John Diffey (left) and Bill Yost, The Kendal Corporation Director for Finance.

✓ A highlight of the gathering was the announcement that Kendal at Granville was recognized by the Senior Housing Council for its overall design in the 2006 Best of Seniors Housing Awards, sponsored by the National Association of Home Builders. Kendal at Granville received a Silver Award in the Overall Community category. Among the qualities cited by the judges were the appeal of the community's great sense of scale, its walkable spaces, and the color scheme that the judges felt gave it a unique architectural interest.

In speaking of the award, Harriet Stone, chair of the Kendal at Granville Board of Trustees said, "It is very satisfying for the design committee of our board who, in working with the architects, were able to create a plan that has resulted in structures that are not only pleasing to the eye, but are very usable for the enjoyment of community life."

When notifying trustees and staff of Kendal at Granville and The Kendal Corporation of this award, Lucas D. Bernesser, architect for Dorsky Hodgson Parrish Yue, expressed pleasure in receiving this kind of recognition. "It's always exciting to get credit for our hard work in the industry, but awards like these would not be possible without clients like The Kendal Corporation."

✓ Read about another important event at this year's gathering on page 7—an award for the Kendal team who volunteered in the aftermath of Hurricane Katrina.

The Right Stuff

Kendal System Lends a Hand in New Orleans

In late August, 2005, Hurricane Katrina devastated New Orleans and the central Gulf Coast. Within days, Larry Minnix, the president of the American Association of Homes and Services for the Aging (AAHSA), e-mailed all member organizations inviting prayers, contributions to the Gulf States Hurricane Relief Fund, and assistance in housing member evacuees. John Diffe, President of The Kendal Corporation, immediately contacted Larry Minnix and Leslie Knight, AAHSA's hurricane relief coordinator, to offer Kendal's assistance.

In mid-September, AAHSA put Kendal in touch with Scott Crabtree, CEO of Lambeth House, an independent CCRC located in New Orleans. Residents of the 12-story community had been evacuated and the building had suffered significant rain and wind damage. Approximately 80% of the staff were unable to return to their own homes, which were severely damaged or destroyed. Kendal agreed to work with the operations staff—temporarily located in Baton Rouge with many of the residents—to discuss how Kendal could help.

As needs for Lambeth House were identified, Kendal affiliates stepped forward to offer human resources, facilities, housekeeping, and health services

support. Three teams comprised of 17 Kendal employees traveled to Lambeth House—one each in October, November, and December. The Kendal teams helped locate or recruit staff for Lambeth House, helped restore the physical plant so that its buildings could be reoccupied, helped residents move back in, and worked alongside Lambeth House staff to restart key services for residents. Lambeth House began bringing residents home in October, and all had returned by late December. Lambeth House staff were an inspiration to those from Kendal, and in return, the care and support Kendal gave was greatly appreciated.

In addition to covering staff time and travel expenses, Kendal affiliates raised a total of \$61,690 for AAHSA's Disaster Relief Fund through combined contributions from residents, communities, and staff. Another \$8,050 in gift cards was presented to Lambeth House employees at the holidays. A donation of cubicle curtains was arranged with an outside vendor and Kendal purchased supplies to furnish two temporary dorms for Lambeth House staff. Kendal staff who did not travel to New Orleans generously contributed extra hours of work in their communities to help make the volunteer program a success.

Comments from some Kendal volunteer team members about their experience and the courage and commitment of the Lambeth House staff—

It was life-altering to go to New Orleans after Hurricane Katrina. Most significant for me was hearing the stories of the residents, board, and staff of Lambeth House—and the incredible creativity and resourcefulness and determination they showed in the midst of the storm and afterward.

Nora E. Adelman
*Director for Policy, Planning and Administration
The Kendal Corporation*

I'll never forget the joy on the faces of the first returning residents and all the staff who had worked endless hours to keep Lambeth House together through the disaster and then be able to have the residents return "home."

Kathe Yerkes
*Director for Dining Services
The Kendal Corporation*

Helping out and providing time off for the kitchen staff was important, but I felt the biggest help was that the staff really just wanted to talk and share their story.

Loren Galt
Consultant, Kendal System Dining Services

The challenges they have faced and overcome are indeed awe-inspiring.

Harold Conklin
Director of Facilities, Kendal at Lexington

This experience was life-changing for me; I saw the suffering and courage of Lambeth House staff members firsthand as they worked to put their personal and professional lives back into a new kind of working normalcy. I also witnessed a living example of commitment to residents, and valuing diversity as they worked through extraordinary circumstances to meet the daily needs of residents.

Toni Merleno
Director of Human Resources, Kendal at Oberlin

“We couldn’t have reopened successfully without Kendal’s help.”

Scott Crabtree, *Chief Executive Officer, Lambeth House*



Scott Crabtree, second from right, and staff of Lambeth House.

One of the things we prize greatly about the Kendal system is the wise and timely help that is given affiliate-to-affiliate across our communities, and the solidarity of our values of caring, hard work, and mutual support. When that is extended even beyond our own network, we are even more proud and grateful.

William R. Rogers, Chair
The Kendal Corporation Board of Directors

Gulf States Association of Homes and Services for the Aging Names Kendal Volunteer of the Year



The Gulf States Association of Homes and Services for the Aging named Kendal as the recipient of their *Volunteer of the Year* award at their annual meeting this spring in New Orleans.

At left are Bill Rogers, The Kendal Corporation board chair, with some members of Kendal’s cross-affiliate Katrina volunteer team showing the award to the 2006 Kendal System All Communities Gathering. Second from left to right: Nora Adelmann, The Kendal Corporation Director for Policy, Planning, and Administration; Rhoda McNitt, Projects Coordinator for The Kendal Corporation, and organizer of the system-wide volunteer effort; Michelle Luecker, Human Resources Manager for Barclay Friends; Kathe Yerkes, The Kendal Corporation Director for Dining Services; John Diffey, President, The Kendal Corporation.

TOPICS *is a publication of*

The Kendal Corporation • Worth Center
1107 E. Baltimore Pike • Kennett Square, PA 19348
610-388-5594 • e-mail: info@kcorp.kendal.org

Barclay Friends

700 N. Franklin St. • West Chester, PA 19380
610-696-5211 • e-mail: admissions@bf.kendal.org

Kendal-Crosslands Communities

Kendal at Longwood - Crosslands - Coniston - Cartmel
P.O. Box 100 • Kennett Square, PA 19348 • 610-388-7001
1-800-216-1920 • e-mail: admissions@kcc.kendal.org

Kendal at Granville

2158 Columbus Rd. • Granville, OH 43023 • 740-587-2840
1-888-607-6660 • e-mail: admissions@kag.kendal.org

Kendal at Hanover

80 Lyme Road • Hanover, NH 03755
603-643-8900 • e-mail: admissions@kah.kendal.org

Kendal at Ithaca

2230 N. Triphammer Rd. • Ithaca, NY 14850 • 607-266-5300
1-800-253-6325 • e-mail: admissions@kai.kendal.org

Kendal at Lexington

160 Kendal Drive • Lexington, VA 24450 • 540-463-1910
1-800-976-8303 • e-mail: admissions@kalex.kendal.org

Kendal Northern Ohio

Kendal at Oberlin

600 Kendal Drive • Oberlin, OH 44074 • 440-775-0094
1-800-548-9469 • e-mail: admissions@kao.kendal.org

Kendal at Home

27519 Detroit Rd. • Westlake, OH 44145 • 440-835-8681
1-877-284-6639 • e-mail: admissions@kahome.kendal.org

Kendal on Hudson

1010 Kendal Way • Sleepy Hollow, NY 10591 • 914-922-1000
1-800-517-8964 • e-mail: admissions@kohud.kendal.org

The Lathrop Communities

100 Bassett Brook Drive • Easthampton, MA 01027
413-586-0006 • e-mail: info@lathrop.org

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THE KENDAL® CORPORATION
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1107 E. Baltimore Pike
Kennett Square, PA 19348

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