

A Good Compass in Turbulent Waters

A message from John Diffey
President and CEO of The Kendal Corporation

In 1987, a little more than a decade into the life of Kendal as an organization, and almost immediately preceding the start of Kendal's growth beyond its original sites here in the Brandywine Valley of southeastern Pennsylvania, Kendal's founding staff and board members worked on a document that came to be called *Values and Standards*. The pamphlet-sized document reflected Kendal's Quaker heritage and its under-girding principles, and incorporated what Kendal had learned since the opening of its first community—Kendal at Longwood—in 1973.

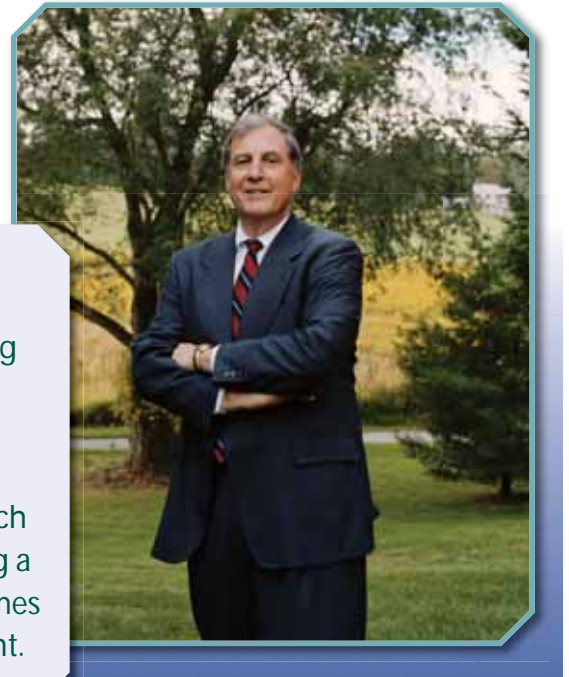
This past year we undertook a substantial review and revision of that document, the first major rewriting since it was first published in 1987. Widely circulated for comments, the original document, and the first draft of a re-written version, attracted more than 300 sets of comments and suggestions for change from community members, staff, and board members. The refined version received widespread affirmation from Kendal boards and has been published and disseminated.

Now titled *Values and Practices*, this recently updated and nearly 25 year-old document continues to be Kendal's strong and centering statement of purpose, core commitments, and desired impact.

As we pull together to diagnose and respond to the current economic challenges which confront our country and the world as a whole, having a strong, clear, and widely understood set of core values and practices is important and helpful.

Kendal entered this economic period fortunate in a number of other ways as well. Kendal's growth has been careful and measured. Assets of existing operations have not been leveraged and put at risk to finance new ventures. In the years leading up to the recent housing and banking crisis, Kendal grew increasingly cautious.

...when things are clear and easy, we can find our way using visible landmarks. In storms though, our view... is obstructed and of little use. In such circumstances, having a good compass becomes all the more important.



That is not to say that Kendal has been entirely immune from impact. The equity portions of investment portfolios have declined in value, interest rate swaps and letters of credit with troubled financial institutions have had to be reworked, the defined benefit pension plan will need additional funding over the next several years, and we will operate even more conservatively than usual for a while in order to mitigate against having to make abrupt changes if business conditions become even more problematic.

Why do we place so much emphasis on values when beginning a discussion about a period of economic challenge? Well, metaphorically speaking, when things are clear and easy, we can find our way using visible landmarks. In storms though, our view of the stars and other navigational landmarks is obstructed and of little use. In such circumstances, having a good compass becomes all the more important.

In this period, we want to be especially sure that we are well-grounded in our values. There are three

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in particular that we are keeping before us—they are *security, community, and integrity*.

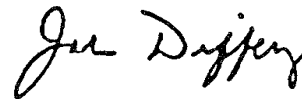
Speaking first of *security*, we want everyone to come through this period as well as possible—community members and staff. It is likely that we will have to use some of the principal in our reserves for financial assistance for residents. It is likely also that we will want to be very conservative in preserving liquidity by keeping staffing levels, capital spending, wage changes, and other expenditures tightly controlled. But we hope, in the process, to come through this period able to maintain Kendal's historic quality, serve every resident who needs financial help, and avoid having to lay staff off into the current and very difficult job-market.

If we are to achieve these things—and I believe we will—the strong sense of *community* that exists throughout Kendal organizations will be an essential strength. We all need to do what we can to help each other, Kendal as a whole, as well as other people and organizations who are close to us. The generation that preceded us has shared its stories of the widespread mutual support with which it met the economic challenges of the 1930s, and we know that our generation is capable of a similar arm-in-arm response.

Integrity is always important, especially so in times of difficulty and even more especially in the aftermath of so many recently published revelations of greed and duplicity. Throughout Kendal, we will be forthright in describing issues with which we are dealing, how they are being addressed, and how everyone can help.

Again, just to be very clear: Kendal comes into this period remarkably fortunate, yet not entirely without some things to address. We have been, and will continue to be, operating in a very conservative mode in the early stages of this recession so as to avoid having to take disruptively abrupt actions, insofar as is possible, if the economic turbulence is very prolonged or significantly deeper than expected. We will speak the truth, work hard to communicate clearly and actively, and let everyone know how to help.

We can't know when this economic storm will end. But we do know that our vessels are strong, our crews are skilled, and our compass is working.



John Diffey, President and CEO
The Kendal Corporation

Meet the New Members of The Kendal Corporation Board of Directors

Dennis Barry of Greensboro, North Carolina, is the CEO Emeritus of the Moses Cone Health System. Among his current volunteer activities are numerous Greensboro civic organizations and the American Hospital Association, National Alliance for Health Information Technology, North Carolina Hospital Association, Healthcare Research & Development Institute, American College of Health Care Executives, Health Issues Study Society, and North Carolina Institute of Medicine.

Spencer D. Hamrick, Jr., of Charlotte, North Carolina, is the Managing Director of East Coast Origination at Wachovia Equipment Finance, a Wells Fargo company. He has been with Wachovia since 1980 in various positions in commercial banking and real estate financial services. Spence's volunteer activities include serving as a board member of the Rotary Club of Greensboro and the World Affairs Council.

Michael J. Hoffmann, of Oberlin, Ohio, retired in 2004 as the Senior Program Officer for Philanthropic Services for The Cleveland Foundation. Mike is a member and board member of Kendal at Home

and a board member for Kendal Northern Ohio. He has served as Treasurer of the Cleveland Board of Education, Assistant to the Cuyahoga County Board of Commissioners, and Manager of Cleveland Congressman Charles Vanik's district office.

Eric Metzker, of West Chester, Pennsylvania, is the Principal Consultant at ICES, a Customer Acceptance Consultant at Lockheed Martin, and an independent consultant through Success Services, Inc. He was previously employed at Agentlogic, Call Technologies, Inc., and GE. Eric serves on the Barclay Friends Board of Directors, is a member and Clerk of Trustees of Willistown Friends Meeting, and a board member of the Rotary Club of West Chester Downtown.

James Wood is a resident of Kendal on Hudson in Sleepy Hollow, New York. He retired in 2002 as First Vice President at Salomon Smith Barney and served as Vice President with The Bank of New York. Jim is a current or past officer, trustee or director of many local community organizations and is a member of Croton Valley Monthly Meeting (New York Yearly Meeting) in Mt. Kisco, New York.

Hands—with Green Thumbs—Across the Sea

Horticultural Therapy in Japan with Roots Stretching Back to Chester County, Pa.

Over a 15 year span, Gwynne Ormsby, recently retired as horticultural therapist at Barclay Friends, worked with young Japanese interns to teach them the discipline of horticultural therapy and to help them become registered with the American Horticultural Therapy Association. Gwynne tutored the interns both at Barclay Friends in West Chester, Pa., and at Melmark, a residential community for people with mental retardation. Each of nine interns spent from two to six months, five days a week, helping Gwynne and learning her field.

Eight years ago, as a guest of the Japan Horticultural Therapy Council, Gwynne travelled to Japan to lead workshops and lecture. As a result of that trip, Gwynne brought back a host of ideas to use in her "new" program and garden development at Barclay Friends—and she also brought back Kitori Kinugasa and Mayumi Naito as Barclay Friends interns.

In November of 2009, Japan was again Gwynne's destination when she made another trip with a focus on the geriatric component of her work. She trained staff and participated in workshops for practitioners of horticultural therapy in both Japan and Korea.

During her latest trip, Gwynne visited what she calls an "inspirational" retirement community on Kyushu, Japan's southern island. She says, "The community is owned and run by a dynamic physician who believes in the necessity of minimizing the use of drugs in the care of older adults—and, he is a strong supporter of horticultural therapy. It was so interesting and reaffirming to see that we have the same conclusions about the need for, and successes of, horticultural therapy—me from my hands-on approach and he from his scientific and medical approach."

Below: Gardens in Japan.



Right: Dr. Nishino with Thika, a translator, in the garden at his "hospital" designed by one of Gwynne Ormsby's former interns.



Below: Residents at Nishino Hospital at work in the garden.



Right: Kawasakigakusha, a small residential rural community for people with mental retardation. Gwynne lectured on "Horticultural Therapy for People with Dementia," and community members gave Gwynne a tea ceremony.



The Kendal System Pioneers Transition to Electronic Records

The Kendal Corporation Guides Conversion Effort for the System

Kendal Answers an Important Call

Despite the national call for a transition to electronic health and medical records, few long term care organizations throughout the country have computerized their full medical record. Now the Kendal System is answering the call and is in the process of implementing an electronic clinical record that is integrated with financial software called *Answers on Demand* (AOD).

Now, in Kendal communities, the thick three-ring binders filled with pages of resident health information and lined up on shelves in most nursing venues in the United States are going the way of the dinosaur. Not only is Kendal once again pioneering in the adult services field, but in the words of Peg Sinnott, Director for Health Services at The Kendal Corporation, “It is turning our health centers upside down.”

Turning it upside down.

The certified nursing assistant, who usually provides 90% of the care for residents, rarely has her or his tasks, observations, or information entered into a paper medical record. The CNA perspective, however, is critical to the entire care process. With the new electronic system, CNAs receive training in information gathering and have access to computers either at or close to the bedside where they immediately can document care provided for and information learned about residents. This electronic record then allows nurses and the entire interdisciplinary team to build assessments and care plans for residents based on the actual care provided by CNAs. CNAs have always been the backbone of care in our health centers; now they are appropriately the foundation on which medical records are built.

In addition to CNA documentation, the electronic medical record will include assessments for all disciplines, care plans, physician orders, progress notes, medication and treatment records, therapy notes—and almost all the other sheets presently stored in those bulging three-ring binders. In addition, through interfaces with local hospitals and pharmacies, Kendal health centers will be able to order medications, transfer information, and receive reports electronically.

Why implement electronic medical records?

Besides reducing paper use, there are several important benefits to electronic medical records. Most

important is an improvement in quality of care for residents and all those we serve. Because all staff have access to computers and document care provided shortly after it has been delivered, information about the status of residents is available to the entire team in a very timely manner. Electronic medical records have also shown to improve the accuracy of documentation, decrease medication errors, improve workflows and efficiencies, and empower staff with enhanced information. For example, under the paper system, when a nursing assistant took a blood pressure she usually wrote the reading down on a slip of paper and recorded it in the vital sign book at the end of her shift. If the reading was abnormal, she may or may not have recognized the abnormality and notified the nurse. With the electronic record system, the nursing assistant enters the reading in the computer at the bedside or nearby. An abnormal reading immediately alerts the nursing assistant that the reading is out of range and sends an alert to the nurse.

Where is Kendal in the process?

At present Kendal at Hanover and Kendal at Granville have implemented AOD. Kendal at Oberlin is scheduled to “go live” at the beginning of May and the remainder of the Kendal communities will be added on at the rate of about one every two months. Preparation for the change, on the other hand, has been underway for over a year. In order to standardize the medical record information, groups of staff from around the system, coordinated by corporate staff, met frequently to decide on what would be included in the Kendal medical record. The result is a standardized platform that will allow for some individualization at the affiliates, but will assure consistent information that can be used for comparisons and sharing of model practices across the Kendal System.

Looking Even Further Ahead

Since the Kendal System is pioneering the implementation of electronic medical records in our field, and other organizations will need to do so in the future, we are attempting to document the process. We hope to share our learnings, and the results of our information gathering with others in the field. In keeping with one Kendal value published in *Values and Practices*—to take an active, collaborative role in aging issues—Kendal has partnered with Widener University’s Center for Business Process Innovation to study the implementation process and the outcomes, and to identify some workflows that can be incorporated into the software. The Kendal Corporation and *Answers on Demand* have agreed to share the cost of a pilot study, while Widener and Kendal Corporation staff explore grant opportunities that would support a full study of the implementation across the Kendal System.

Shedding Some Light on Falls

High School Senior's Girl Scout Gold Award Project Makes a Difference

by Becca Jackson

In a family of engineers, I grew up with only two real rules: be curious and give back. Whether coaching a middle school Science Olympiad team or hammering together the foundation of a house, I always tried to match my passion for science and buildings with my love of helping others. So when it came time to come up with a Girl Scout Gold Award project, I decided I wanted to forgo the typical food drive or educational program in favor of something more meaningful to both myself and my community. After my sophomore year, I started making contacts, hoping to come up with a quality project. When I heard from Patricia (Pixie) Wilder, a registered nurse at Kendal at Longwood, I was elated. Pixie is the chairperson of the Kendal at Longwood Falls Prevention Committee, and she suggested the possibility of studying the recent increase in resident falls. I already had been active in the Kendal at Longwood community, visiting residents and hosting tea parties during the previous summer, and I was excited about carrying out a project with the people I considered to be part of a fantastic staff.

The topic of the study seemed both important and perhaps a little daunting—to create and test new approaches that might help reduce falls. As I started considering the situation, I learned that a new, well shaded wing of the health center had been built within the past several years. I found that the daylight orientation of the wing, plus the installations of new high intensity lighting, had combined to generate shadows that impaired residents' ability to see their way around the rooms. Tours of the rooms, further research, and some advice from experts revealed that a series of relatively small steps could have an enormous impact. Among the changes we implemented were the introduction of compact fluorescent light bulbs and regular checks of lighting functionality. The changes initially were introduced in eight resident rooms over the course of a year. At the end of that year, fall data for those residents was compared to that of residents not involved in the study and to data from previous years. Data analysis showed that the residents with the new lighting system

Data analysis showed that the residents with the new lighting system experienced fewer falls than other residents and than those from previous years.



Becca Jackson, the project designer, and Pixie Wilder, R.N.

experienced fewer falls than other residents and than those from previous years.

At the start of this project, I was concerned that I might find myself with a minimal role or that I might feel little respect since I was only a high school student. But whether it was helping me access the archives of falls or giving me a tour of the rooms, I never received any negative response, only encouragement and constructive criticism. Pixie and the rest of the staff were extremely knowledgeable about falls and resident care, and their meticulous records of falls for the past several years were a true asset in assessing and creating the lighting solution. I am so pleased that the staff members of Kendal at Longwood were more than happy to give me the opportunity to make this project a success.

I know that I was given the opportunity to assess a situation, explore the data, make observations, and create a solution that truly impacts the lives of older adults in a very positive way...and I am very grateful for the experience.

Becca Jackson is a senior at The Charter School of Wilmington in Delaware and is the daughter of Elaine Jackson, Affiliate Services Training Coordinator for The Kendal Corporation.

On the Menu: Forward-Looking Developments in Kendal Dining Services

Design and Re-design

Kendal at Lexington opened the doors to a renovated Bistro featuring, among other specialty items, hearth baked or panini grilled foods.



Scenes from Kendal at Lexington's very popular new dining areas.



Kendal at Oberlin is working with designer JEM Associates to expand dining options. The expansion and renovation will create a Café-Bistro where food is cooked to order, a buffet for residents who like to serve themselves, and a traditional formal waited service area. Construction is expected to begin in late spring.

Kendal at Hanover, supported by Sedexo, is involved in a renovation process that includes dining.

Nutrition Care Process

Certified Dietary Managers and Registered Dietitians representing eight Kendal affiliates met during a retreat at Kendal at Longwood and Crosslands to learn about a new approach to nutritional care. Developed by the American Dietetic Association, the new method offers a systematic process for dietetic practitioners to use in providing care. The process is designed to improve consistency and quality and to assist Registered Dietitians to measure outcomes by following four steps in nutrition: assessment, diagnosis, intervention, and monitoring and evaluation. In addition, new definitions will standardize and structure documentation, thereby changing the way the dietitians currently assess residents' nutrition needs and record information.

The two-day retreat featured training by Carol Elliott, a nutrition consultant and member of ADA's Peer Network for Nutrition Diagnosis group. The Kendal peer group practiced using the Nutrition Care Process with case studies and standardized the assessment tool for use in Kendal communities. The successful retreat positioned Kendal affiliates to implement the new process with peer support as the new Answers on Demand software is rolled out.

Flexible Meal Plans

Several Kendal affiliates now offer an array of flexible meal plans in addition to the original one-meal-a-day plan. Kendal at Longwood and Crosslands have a 25 meal per month plan, and Kendal on Hudson began to offer the plan in March. Kendal at Granville offers a 30 meal per month plan, and Kendal at Lexington utilizes a declining balance plan. The increased flexibility meets the needs of residents who travel or dine out regularly.

Group Purchasing

With food costs increasing 7-8 %, a team of dining directors assessed three different group purchasing organizations to determine the best pricing plan. Kendal's volume as a group placed the system in the most competitive pricing tier. Further savings are being realized through careful purchasing by the production managers .

It's Worth Thinking Again about Charitable Gift Annuities

They prove to be an excellent option any time.

In just one week in January 2009, Kendal affiliates reported processing nearly \$500,000 in Charitable Gift Annuities (CGAs). Nearly \$400,000 were concluded and signed while another \$100,000 remained in process. What is a charitable gift annuity and what draws this level of response?

One simple answer may sound extremely familiar: it's the economy. Where else can you invest your money, and receive a risk-free return that can produce annual income of 6.3% at age 75 and 7.1% at age 80, for example? A charitable gift annuity is a contract between a donor and a charity in which the donor irrevocably transfers money and/or property to the charitable organization, and the organization takes on an obligation to pay an annuity for the lifetime of either one or two annuitants.

If this sounds good, there is more! The donor also receives a generous tax deduction for the gift made to the charity. And the charity will expect to receive approximately 50% of the value of the gift at a later date when the gift matures. It is a win-win for both the donor and that Kendal affiliate or program which the donor selects to receive the gift.

Here's how it works. A donor who is 80 years old gives a gift of \$10,000 to a Kendal affiliate. His immediate charitable deduction is \$5,092. His annual income will be 7.1% of the gift's original value or \$710 annually. Of the annual income, \$522 is tax exempt. After his death, the charity will receive the remaining value of the gift outright.

A donor who is 75 years old gives a gift of \$50,000 to a Kendal affiliate. Her immediate charitable deduction is \$22,715. Her annual income will be 6.3% of the gift's original value or \$3,150 annually. Of the annual income, \$2,200 is tax exempt. After her death, the charity will receive the remaining value of the gift outright.

But about that earlier question—What draws this level of response to the offer of a Charitable Gift Annuity? The answer is really a lot more than simply, "It's the economy..."

Here's an illustration explaining the motivation of Frank Conant, Lathrop Communities resident: As an early member of the philanthropy committee Frank felt it important to provide for the needs of the community. As a committee member he encourages residents to donate funds not only for community priorities but also for the Residents' Assistance Fund. As an early advocate for a charitable gift annuity program, Frank decided to demonstrate his confidence by entering into a contract with Lathrop.

(Find out more by visiting the website at <http://www.legacy.vg/97/giving/3.html#1d>).



Maybe you would like to find out more about how you can follow Frank's example. Contact the Kendal executive director near you, or call Cheryl Wade, Director for Philanthropy, at 610 335-1223.

Updated *Values and Practices* Replaces the Original 1987 *Values and Standards*

In January of 2009, The Kendal Corporation published the new *Values and Practices*. The statement is the first major revision of the original *Values and Standards*, first published in 1987. The so-called "values booklet" has been a widely circulated document within and outside the Kendal System of communities and services for older adults. The statement helped to direct Kendal's evolution as it gained a national reputation for excellence, and subsequently helped direct its growth in the areas of additional communities and services, and in education and advocacy in the field of aging services.

The publication of the revised version of *Values and Practices* presents and reinforces the values shared by the entire Kendal System, and the statement has been embraced and adopted by the whole system.

In an open letter to Kendal's constituency, William Rogers, Chair of the The Kendal Corporation Board of Directors, and John Diffey, President and CEO of The Kendal Corporation, declared, "The very process of reviewing and redrafting this statement of values reflects the nature of our shared commitment...it makes relevant the Quaker sensibilities which have animated and guided our work, and it demonstrates the inclusiveness and affection with which we hold others of all backgrounds in high esteem. These distinctive



qualities are the core of what makes Kendal attractive and what has drawn us all together."

The *Values and Practices* revision process and the resulting publication reflect Kendal's governance style as a system with a federal-style structure that affords affiliates a combination of autonomy and support with respect and care given to all viewpoints. In response to the draft revision, over 300 sets of comments were received from Kendal board, staff and

community members. Comments came from those familiar with all aspects of Kendal's 35-year history.

The resulting document includes additional values that more accurately speak to today's concerns and to the current reach and depth of Kendal's work. Generosity, sustainability, participation and consensus building, fiscal integrity, and social accountability are all emphasized to reflect Kendal's experience and its direction for the future.

Kendal's *Values and Practices* is available on line at www.kendal.org, or hard copies are available by writing The Kendal Corporation, 1107, East Baltimore Pike, Kennett Square, PA, 19438, or by calling toll free (800) 220-0042.

Kendal System Accreditation Update

Kendal at Longwood
Crosslands
Kendal at Hanover
Kendal at Oberlin
Kendal at Ithaca
Kendal at Lexington
Kendal at Granville
Kendal on Hudson



All are accredited as continuing care retirement communities by CARF/CCAC, an international body accrediting organizations that aspire to excellence. Kendal at Oberlin is also accredited as a person-centered long-term care community.

Barclay Friends is accredited by the Joint Commission on Accreditation of Healthcare Organizations.



Joint Commission
on Accreditation of Healthcare Organizations

Sustainability News...a sampling of initiatives from around the Kendal System

Kendal-Crosslands Communities

In cooperation with an experimental program run by the University of Delaware, a station has been set up at Crosslands to establish test and control sites for the control of the pest mile-a-minute weed (*Polygonum perfoliatum*). The uncontrollable vine scourge is being confronted not by herbicides but by weevils (*R. latipes*). Successive generations of weevils feeding on the vine eventually control the plant. The big challenge is winter survival and reemergence for the weevils. So far, results look very encouraging.

Barclay Friends

To boost cost effectiveness and energy efficiency, digital controls have been installed for building management and heating/air conditioning.

Kendal at Hanover

The architect for Kendal at Hanover's planned expansion has been asked to keep The Leadership in Energy and Environmental Design (LEED) Green Building Rating System principles in mind as the design work proceeds. LEED principles provide tools for maximizing building performance.

Refurbishment of building exteriors for enhanced energy efficiency is continuing.

Lathrop Communities

Presentations by speakers on environmental topics are planned, some open to the public.

The Lathrop Green Sheet newsletter has been initiated.

EarthMate CFL bulbs with lower mercury content and other conservation measures are being promoted. Programmable thermostats have been introduced.

The Kendal Corporation

Corporate staff agreed to a shared goal of reducing paper usage by 10% in 2009.

The cleaning service company contracted for Worth Center uses only natural products.

Hybrid vehicles are rented whenever possible for business trips.

Kendal on Hudson

A campus-wide motion detector corridor lighting system saves 4,000 kw per building each month.

Sustainability has been included in the strategic plan, including exploration of composting, and solar and wind power. A study by the New York State Energy Research and Development Authority (NYSERDA) will be reporting soon.

Kendal at Ithaca

Kendal at Ithaca undertook an energy study partially financed by NYSERDA. Final goals would be to become more energy efficient, reduce energy use and cost, reduce the carbon footprint, install recommended measures, and track the results. Recommendations range from installation of condensing boilers and energy recovery units to controls for air handlers and attic insulation. Payback calculations cover 1-24 years for recommended measures. The study projected savings of up to \$244,987 per year if all measures were installed.

Kendal at Oberlin

All cottage and apartment turnovers and new units receive Energy Star appliances. Solar tubes are being retrofitted in resident homes to lighten dark areas of the living rooms. A survey is being developed to determine what energy conservation steps are being implemented by residents.

Kendal at Granville

Housekeeping has switched to all green products. Styrofoam use is being sharply curtailed.

Relationships are being developed with local farms and dining services is working with local markets to purchase local produce.

Kendal at Lexington

New cottages and apartments feature tankless water heaters, cellulose insulation in attics, dual flush toilets, Energy Star appliances, and high efficiency furnaces.



TOPICS

a publication of THE KENDAL CORPORATION

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