

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<sup>®</sup> TOPICS

SUMMER 2002

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## Of *Excellence* and Wider *Service*

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

Like other not-for-profit organizations—colleges and universities, private secondary schools, hospitals, and others—Kendal has multiple aspirations. Moreover, these important goals to which we are committed are difficult to achieve simultaneously.

Our first aspiration is to be excellent in how we serve. We want to be sure that Kendal's *Values and Standards* are genuinely reflected in all of our practices, that service to residents is of uncompromisingly high quality, that our communities are employers of choice in each locale, and that Kendal organizations innovate to remain dynamic and thriving in the future. Our sister not-for-profit organizations speak similarly of their commitment to quality and the critical factors that enable it.

Kendal shares a second aspiration with these other institutions; it has to do with those whom we seek to serve. It has always been a part of Kendal's mission to address the needs of a broad segment of society. Just as the best colleges and universities attempt to serve students from a broad range of economic circumstances and cultural backgrounds; just as the best secondary schools seek to reach beyond serving only those who can afford full tuition; just as the best motivated hospitals decline to favor private pay patients over serving the needs of the broader community—so also does Kendal seek to serve older people whose economic means and backgrounds are diverse.

Reconciling excellence in service and breadth of outreach is not easy for not-for-profit organizations. It can be tempting to sacrifice quality in pursuit of accessibility. It can be equally tempting to serve only those who can afford quality and forsake the effort to serve more widely. Kendal—just as the best of other not-for-profit activities—seeks to do both. However imperfectly we may achieve a balance, we remain unflinchingly committed to both of these essential goals.

Over its history, Kendal has earned a reputation for quality, indeed for leadership, in raising the standards in our field as a whole. What has come more slowly is a reputation for working hard also to meet the needs of people of a broader range of circumstances. In this issue of *Topics*, we are pleased to be able to report on some current growth and development activities which both strive to sustain Kendal's quality and seek to serve a broader spectrum of need. With your support, individual Kendal communities and the Kendal family as a whole will grow stronger in meeting both essential goals. In doing so, we will join the company of the best of our colleges and universities, hospitals, and other not-for-profit organizations. For they demonstrate an enduring commitment to the achievability—and the reality—of excellence walking hand in hand with charitable purpose. Working together, so can we.

*John Diffey*



# The Kendal Corporation *Board News*



**R**etiring amid expressions of gratitude and thanks—between them, Bob Metz (left) and George Bent (right) served as members of The Kendal Corporation Board for 20 years. In addition, they have been involved with nearly every other board in the Kendal system. Over the years, board and staff have come to appreciate the good judgment of both George Bent and Bob Metz, listening carefully when they spoke and also appreciating their friendship. In both instances, their ability to have a vision of a future different from the present has been a gift to Kendal, and we hope to move into the future with the same energy that they gave in such complete measure over the years.

**BOB METZ** was the founding chair of the Kendal at Hanover (New Hampshire) Board of Overseers and as such participated in the dramatic change of the Kendal organization as we developed the first community at a distance from Kennett Square. It took no small amount of courage and then energy to accomplish this new community outside Pennsylvania. Kendal needed Bob then and since as a formal and informal liaison with what turned out to be such a magnificent affiliate community. Bob served as a corporate board member since 1989, and also on the boards of Kendal on Hudson (from 1997) and Kendal at Ithaca (from 1999).

**GEORGE BENT** was instrumental in the development of Kendal at Oberlin, Ohio, where he had served as chair of the board of trustees of Oberlin College. He joined The Kendal Corporation board in 1995 in the Kendal at Oberlin seat, and also served on the Kendal at Lexington board, beginning in 1997. Well-equipped by background—in business and nonprofit organizations—and temperament to be an outstanding leader in the CCRC world, George also garnered national recognition from the American Association of Homes and Services for the Aging.

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## *Joining* The Kendal Corporation Board in 2001-2002:

**WENDELL WHITLOCK**, of Wyncote, Pennsylvania, also serves as chair of the board of directors for Progress Investment Associates of Philadelphia, and is a life member of the Pennsylvania National Alumni Association at Cheyney University. He is a former member and vice chair of the Council of Trustees of Cheyney University, and former trustee of Episcopal Academy in Merion, Pennsylvania, and Lankenau Hospital in Wynnewood, Pennsylvania.

**MARK MYERS**, from Unionville, Pennsylvania, is a retired senior vice president for research and technology for the Xerox Corporation. Mark is a member of the Kendal-Crosslands Communities

board; serves as chair of the board of trustees for Earlham College, Earlham School of Religion in Richmond, Indiana; and is a member of the boards of directors of the Connor Prairie Museum in Indianapolis; SDL, Inc., in Sunnydale, California; and ScanSoft, Inc. in Peabody, Massachusetts.

**JOHN PICKEN**, of Oberlin, Ohio, is a retired senior associate physician with Peer Review Systems, Inc., of Westerville, Ohio. John is a member of the Kendal at Oberlin Board of Directors. His career includes positions as associate medical director and senior vice president for medical affairs/medical director for Riverside Methodist Hospital in Columbus, Ohio.

# 2002 All Communities *Gathering*



What do organizations look like if they are good at sustaining innovation? The 2002 All Communities Gathering considered this question in the company of 150 board members, staff, and resident association presidents from Kendal affiliates and The Kendal Corporation. Paul Light of the Brookings Institution was the keynote speaker, leading participants to consider the core values—internal trust, honest, rigor, and faith—of organizations that innovate effectively.

## *New Corporate Role*

### Director for Affiliate Services



by Judy Braun

The Kendal Corporation Director for Affiliate Services is a newly created position with responsibilities for supporting operations of Kendal affiliates and coordinating corporate staff resources. The director works with the executive directors, boards of directors, affiliate and corporate staff, and residents to optimize the performance of the affiliates and the system as a whole. In the job description are words like “coach” and “facilitator” and over the last 10 months three primary categories of activities have emerged.

**1. Connecting people and resources.** A major function of my role is to facilitate collaboration among Kendal affiliates and The Kendal Corporation, and between the Kendal system and the wider world. My work is intended to help the Kendal affiliates learn from one another and maximize the benefits of being part of our system. Some methods I use to further these goals are facilitating regular conference calls among department heads, organizing group purchasing opportunities, coordinating the development of benchmark data, and facilitating the relationships between communities and local colleges and universities.

**2. Supporting areas for improvement.** Kendal affiliates enjoy both a record of and reputations for the highest quality, and residents, staff, and board members are committed to continuously improving Kendal’s quality. In this aspect of my role, I have become involved in a variety of projects to enhance operations in individual Kendal communities and within the Kendal system—some specifics include providing board education, coaching executive directors, evaluating aspects of clinical and financial operations in individual Kendal communities, coordinating start-up activities for new affiliates, and developing communication strategies to better explain the Kendal system to residents.

**3. Stretching the Kendal system to lead in the field.** One of Kendal’s stated values is to demonstrate leadership in the field of services for the aging by impacting care for older adults and making a difference in their world. I hope to be instrumental in helping to advance this commitment by developing a research agenda for the Kendal system, supporting the Kendal/interRAI project, and participating in a variety of professional organizations.

# CROSSLANDS

Kennett Square, Pennsylvania

## New Cottages

Kendal-Crosslands board, staff, and residents welcomed prospective residents of Crosslands' new cottages at a groundbreaking ceremony on May 30. Gathered in front of the farmhouse on the property adjacent to Crosslands, the group was welcomed by board clerk Dick Kirk, residents' association president Betty Mather and executive director Phil DeBaun. Representatives of the contractor, Warfel Construction, were also on hand.

Special guest and founding Crosslands resident Adrienne Wickersham commented favorably on Crosslands' latest success as she turned the first shovelful of soil. After the ceremony, the prospective residents joined hosts for lunch and an information sharing on the construction project, their new homes, and life at Crosslands.



Left to right: Dick Kirk, Clerk of the Kendal-Crosslands Communities Board of Directors; Phil De Baun, Executive Director of Crosslands and Cartmel; Adrienne Wickersham, Founding Resident of Crosslands; Betty Mather, President of the Crosslands Residents' Association.

# Affiliate News

## KENDAL AT LONGWOOD

Kennett Square, Pennsylvania

### Wellness Center

Final design of the Kendal at Longwood wellness center is now complete. The wellness center will be attached by a connecting bridge to the Cumberland wing of the Kendal health center and will include therapies, fitness rooms, separate therapy and lap pools, and a multipurpose room for floor exercises and dance. A fund raising campaign to help support the cost of the new center was organized by a committee of Kendal residents and has generated \$1.7 million in donations and pledges to date. Groundbreaking is projected for fall 2002.



Architect's rendering of the lap pool in Kendal at Longwood's new wellness center.

# KENDAL AT OBERLIN

Oberlin, Ohio

## New Directions

**LIFE CARE AT HOME:** Kendal at Oberlin has received a \$50,000 grant from The Cleveland Foundation to cover the costs of a feasibility and marketing study designed to evaluate a new program that would offer a continuing care at home contract to clients in Lorain County and Cuyahoga County, Ohio. The initial funding was supplemented by grants from Kendal Charitable Funds and Kendal at Oberlin. Results are expected by the end of 2002.

**GROWTH PLANNING:** Kendal at Oberlin's board has created the Growth Task Group to determine appropriate expansion steps for Kendal's next decade. Areas of focus include physical plant and program needs, land acquisition, site planning, and financial modeling. Individual task groups in these areas—with broad participation from residents, staff, and board members—are expected produce a final report for the board in November, 2002.

**AAHSA BOARD MEMBER:** Executive Director Barbara Thomas was elected in November, 2001, to a three-year term on the Board of Directors of the American Association of Homes and Services for the Aging (AAHSA). Barbara's current service with AAHSA also includes work on the Integrity Task Group and Assisted Living Committee.

**Best Practices Honored:** Kendal at Oberlin's Board Mentoring Program and Volunteer Clearinghouse were selected by the Continuing Care Accreditation Commission (CCAC) as "best practices." The programs were recognized in presentations at the fall, 2001, and spring, 2002, AAHSA conferences, and will be featured in an AAHSA publication this summer. In addition, AAHSA's newest quarterly publication, *Best Practices*, featured Kendal at Oberlin's human resources recruitment practices and the "Falls at Risk program."

# KENDAL AT LEXINGTON

Lexington, Virginia

## Health and Wellness Center



Kendal at Lexington's new health and wellness center is nearing completion for a scheduled fall opening. In accord with Kendal's goal to be of service to the wider community, a collaborative relationship between Kendal and Stonewall Jackson Hospital will allow the new center to serve both Kendal residents and those currently receiving care in the hospital's extended care facility. The fully licensed, 60-bed Kendal center will be certified for Medicare and Medicaid reimbursements.

The Virginia State Corporation Commission approved Kendal at Lexington's new contract offerings for extended health care. Kendal is now offering contracts which cover unlimited nursing care (lifecare), and a modified contract which covers 365 days of nursing care, as well as the original contract, which covers 60 days of nursing care.

In addition, approval was received from the commission for two new entry fee refund options. In addition to the original declining entry fee refund, 50% and 90% refund options are now offered.

# Affiliate News

## BARCLAY FRIENDS

West Chester, Pennsylvania

### Fund Raising Strides

Philanthropy is alive and well in the Barclay Friends "family." Since its inception in July, 2000, the Barclay Friends Board Development Committee expanded the fund-raising effort from a single yearly direct mail appeal to a multifaceted, comprehensive program resulting in \$215,000 of revenue in 2001. The primary goal for this very successful program is continuous improvement of the quality of life for residents of Woolman residential and assisted living and Cotter nursing care communities. Steps taken to reach the goal included the hiring of a part-time development director, enhancement of *Caring Fund* direct mail appeals, and creation of major gifts, planned giving, and grant-writing programs. In keeping with Quaker philosophy and the mission of Barclay Friends, the projects and services developed as a result of fund-raising activities continue to enhance a supportive, homelike and compassionate atmosphere for residents.



Contributions from friends, families and foundations enabled the construction of the Ruth T. Cottom Garden at Barclay Friends, providing a gentle space for invigorating exercise, quiet contemplation or continuation of a resident's passion for planting and nurturing plant materials of their choosing.

## KENDAL AT ITHACA

Ithaca, New York

### One Kendal Program

*When we see a need, we come together to take care of it. That's what Kendal is about.....* This statement was made by a member of the recently formed *One Kendal Committee*, an idea born to encourage more interaction between residents living independently and those residing in the health center. A reception desk staffed by volunteers has been set up in the health center. A group calling itself *Friendly Visitors* do all kinds of tasks in addition to visiting. Still another group established a book and periodical cart. Several residents organized themselves as escorts to take health center residents to community activities, while others host afternoon teas.



OK (One Kendal) Dining Club volunteers take health center residents to a meals in different dining rooms. The response is enthusiastic from everyone involved. In fact, one of the health center residents has asked to become an OK volunteer. We are truly *One Kendal!*

## KENDAL AT HANOVER

Hanover, New Hampshire

### Health Center Completed

Phase II of Kendal at Hanover's five-phase construction process includes a fully renovated health center and new amenities such as a larger assisted living room, a beautifully renovated dining facility, additional office space, meditation room, and garden area. With the assistance of dedicated staff and resident volunteers, 32 residents began moving into the renovated facility on June 4, 2002. Phase III will be completed in September 2002, giving additional space to residents in the Friendship Program.

# Continuing Grants

## to Programs of The Kendal Corporation

### ► *Kendal/InterRAI Collaboration*

This collaboration will develop a screening tool for those who live in residential settings to supplement the tools already in use in long term care.

In addition to Kendal and InterRAI, the multinational research and practice consortium, the partnership includes Hebrew Rehabilitation Center in Boston and the University of Michigan.

Sybil Schwartz was named Project Director for the Kendal/InterRAI collaboration. Sybil is a registered nurse and paramedic and earned masters degrees in education, counseling, and administration. In Sybil's first months on the job, she has been developing a screening tool for resident assessment. The tool has been modified in conjunction with Kendal's research partners, and it is being piloted at Kendal at Longwood in Kennett Square, Pa.

### ► *Pennsylvania and Ohio Best Practices grants*

The last issue of TOPICS reported on the receipt of a \$250,000 grant from the Pennsylvania Department of Health to collaborate in a two-year study of best practices in long-term care in Pennsylvania. With Beryl Goldman, The Kendal Corporation's Director for Health Services, nurse educators Sabita Balgobin and Ruth Bish have identified 10 long-term care facilities that will take part in the project.

The Kendal Corporation has received a \$234,000 one-year grant for a similar initiative, The Models of Care Project, from the Ohio Department of Health.

### ► *Pennsylvania Restraint Reduction Initiative (PARRI)*

The Commonwealth of Pennsylvania and the County Commissioners granted \$401,800 for year 7 of the Pennsylvania Restraint Reduction Initiative (PARRI).

Originally, the initiative's goal was to assist long-term care facilities in Pennsylvania eliminate the use of physical restraints through a train-the-trainer program. Since July, 2000, Kendal's four person training team has included assistance with reduction in the use of chemical restraints and in resident falls. Twenty long-term care facilities are serving as physical restraint training sites, and three are chemical restraint training sites, actively supporting other facilities in their regions.

In the sixth year of the program, the team produced a video for nursing assistants focused on interactions with residents who exhibited difficult behaviors. The video was used in training sessions for facility staff.

To date, 72.5% of Pennsylvania's 801 long term care facilities have participated in the initiative through phone consultation, training programs by PARRI team members, and facility meetings with PARRI team members.

### Kendal at Hanover (continued)



The cost of the renovations was offset in part by generous donations in excess of \$1,000,000 from residents. Residents also donated an additional \$750,000 to transform an old skilled nursing unit into enhanced space for the resident clinic. The old clinic space will become additional activity space for the Friendship Center and the developing adult day services program. Some of the old space also will be devoted to expanding the child care program.

# KENDAL *on Hudson*

## KENDAL ON HUDSON

Continuing Care Retirement Community Under Development in Sleepy Hollow, New York

**Marketing Office Opens.** The Kendal on Hudson marketing office opening in April on the grounds of the Phelps Memorial Hospital Center. As of mid-May, a model of the community is on view in the office. "Now prospective residents visiting the office can enjoy views of our site, Rockwood Hall State Park and the Hudson River, and also can envision the model buildings in this beautiful setting," says Maureen Voghel, Kendal on Hudson's Director of Marketing and Admissions.

"We are very appreciative of the hospital's welcoming attitude and assistance in bringing this office into being," says Tim Reed, The Kendal Corporation Director for Property and Design. "It is one more example of the good working relationship we enjoy with the Phelps staff."

The Kendal on Hudson Marketing Office hours are 8:00 A.M. to 5:00 P.M. Monday through Friday, and weekends by appointment. The toll free phone number is 1-800-517-8964.

**Site Plan Approved.** On Thursday, April 28, 2002, the Sleepy Hollow Planning Board unanimously granted site plan approval for Kendal on Hudson. The approval completed nearly three years of work with the Village of Sleepy Hollow.

The New York State Department of Health is in the process of final review of the Kendal on Hudson certificate of authority application. That approval paves the way for the admissions process to proceed. In the meantime, prospective residents are enjoying visiting the office to meet the staff and view the model.



Front: Maureen Voghel, Director of Marketing and Admissions; Denise Di Giacomo, Administrative Assistant. Back: Dave Swartz, Project Consultant; Terry Minervini, Marketing and Admissions Associate. Below: The architectural model.

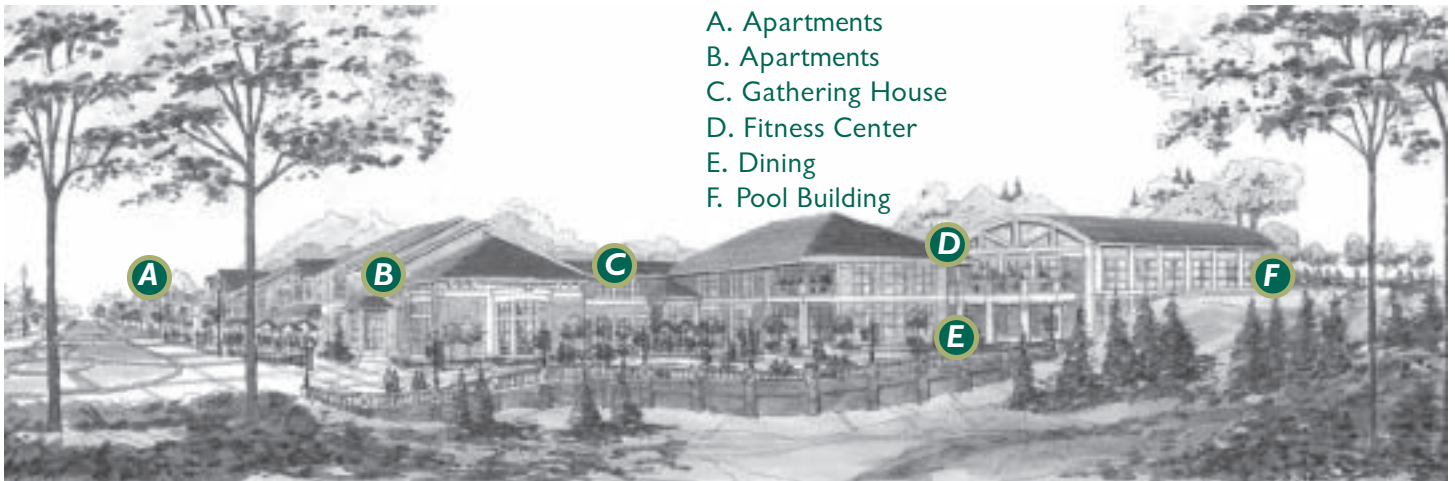


# KENDAL at Granville

## KENDAL AT GRANVILLE

Continuing Care Retirement Community Under Development, Granville, Ohio

*a charming and friendly "village" design concept*



- A. Apartments
- B. Apartments
- C. Gathering House
- D. Fitness Center
- E. Dining
- F. Pool Building

In spring 2001 Kendal at Granville obtained 88 acres of beautiful land near the Village of Granville and Denison University. Over the past year a great deal has been accomplished. An exciting master plan utilizes a village concept and offers 14 different residence styles. The community center will include formal and informal dining as well as a fitness center with indoor lap and therapy pools. The site is now fully zoned, and best of all—the fees are in the same range as announced in 2000. The office has an vibrant new set of informational materials including brochures, floor plans, color renderings and a 3-D model of the community.

Admissions are well underway. Monthly series of informational meetings are bringing new friends to the mailing list and priority list. Special events have been held at the Columbus Museum of Art and the Franklin Park Conservatory in Columbus. For the Founders, a number of informal gatherings are planned including a concert, antiques show, and "bluesfest," all in Granville.

Kendal at Granville now offers a modified life care

contract that gives residents with long term care insurance a discount on their entry fees. This plan is available with the declining refund and 50% refundable agreements already offered.



In the Granville office left to right are Michael Levenoood, Marketing Consultant; Bobbi Thios, Director of Marketing and Community Relations; Jeff House, Project Director for The Kendal Corporation; Tom Mitchell, Project Development Consultant; Bill Silbert, Director for Marketing and Public Relations for The Kendal Corporation; Raenae St. Julian, Associate Director of Marketing and Admissions; Terry Merrin, Office Manager; and Ruth Weaver, Office Assistant.

**TOPICS** is a publication of  
The Kendal Corporation • P.O. Box 100 • Kennett Square, PA 19348  
(610) 388-5594 • e-mail: [info@kcorp.kendal.org](mailto:info@kcorp.kendal.org)

**Kendal at Longwood • Crosslands • Coniston • Cartmel**  
P.O. Box 100 • Kennett Square, PA 19348  
(610) 388-7001 • e-mail: [admissions@kcc.kendal.org](mailto:admissions@kcc.kendal.org)

**Kendal at Hanover**  
80 Lyme Road • Hanover, NH 03755  
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600 Kendal Drive • Oberlin, OH 44074  
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**Kendal on Hudson**  
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1-800-517-8964 • e-mail: [admissions@kohud.kendal.org](mailto:admissions@kohud.kendal.org)

**Kendal at Granville**  
1921 Newark-Granville Rd. • Granville, OH 43023 • (740) 587-2840  
1-888-607-6660 • e-mail: [admissions@kag.kendal.org](mailto:admissions@kag.kendal.org)

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