

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

SPRING 2001

A message from John Diffey, President of The Kendal Corporation

Considering Kendal *without* Philanthropy

What would have happened...

...30 years ago had the Philadelphia Yearly Meeting of the Religious Society of Friends not given Kendal a \$300,000 grant to explore the development of a continuing care retirement community in Kennett Square, Pennsylvania?

What would be the character...

...of each Kendal community were there not the charitable endowments to provide care and services for those who outlive their financial resources, and the very entry into Kendal of those whose lives have been spent in modestly compensated service?

To what extent could Kendal...

...have made such a tremendous impact on ending the practice of using physical restraints in long term care settings across the country without the Emily Wilson bequest?

Would Kendal at Lexington exist...

...had Fred and Isabel Bartenstein not given the beautiful Virginia land on which the community is now located?

How much would be compromised...

...in the affordability of our on-site child day care, and dozens of other programs and physical enhancements across the Kendal family without the generosity of donors?

Would Kendal be able to offer...

...meaningful internships to promising future leaders without the Eugene Perry bequest?

Clearly, the Kendal family has been able to do so much more *with* important and growing support than *without*. We serve people we otherwise could not serve; we maintain levels of quality we could not otherwise sustain; we make our communities more affordable to a broader range of people; and we serve as a beacon and advocate for improving standards of care—all because of significant philanthropic support for Kendal's essential work.

The leading colleges and universities are those that have built significant endowments, have attracted strong support for programs and physical facilities, and have been able to make necessary financial commitments to deserving students.

The leading organizations in our field also will be those committed to worthy goals and a degree of excellence that only a strong tradition of philanthropy will make possible. That tradition is growing within Kendal; it needs us all if Kendal is to reach its full potential. In this issue of Topics, we are pleased to share some of the ways in which philanthropy has been of crucial importance.



John Diffey

with your help we are



Kendal-Crosslands Communities

Child Care Assistance for Staff

Resident Whitey Mullestein, grateful for the fine care Crosslands' health center provided for his wife, created the Louise P. Mullestein Fund to fund child day care scholarships for staff who needed assistance. Whitey originally made a gift of \$50,000 in the form of a matching grant to create an endowment whose income would be used for scholarships.

The fund is now a popular destination for gifts from residents and now totals \$150,000. Annual scholarships totalling \$7,500 are divided among staff members according to need.

Entry Fee Assistance for Residents

This donor-designated fund to assist worthy candidates with partial or full payment of entry fees began in the early days of Kendal-Crosslands. To date the fund has helped several dozen prospective residents join the communities. In an average year, two new residents are granted a total of around \$75,000 in assistance. Criteria for accepting qualified applicants center on those who have a life of service, either as a vocation or an avocation.

► for the FUTURE: A New Wellness Center

A dream of residents and staff alike for several years, the new wellness center will be the centerpiece of a campaign which is now in the planning stages. Enhanced therapy spaces will make it possible for residents to receive a more complete array of treatments on site. The resident wellness effort will get an all-around boost through this important undertaking.

Top left: Kendal at Longwood Day Care children. Top right, Gwynne Ormsby, Barclay Friends' horticultural therapist, and bottom right, a bridge in Anne's Garden.

Barclay Friends

Support for the New Building

Barclay Friends' Capital Campaign raised \$853,593—113% of the goal. Of the monies pledged, \$120,000 was restricted to use for the building, and \$110,000 for financial assistance. The remaining \$622,000 is unrestricted.

An Ambitious Garden Program

Generous donations created Anne's Garden (above) and made possible the staff addition of horticultural therapist.

► or the FUTURE: Greener Horizons

Additional gift opportunities are possible: a garden area in memory of Ruth Cottom, a former resident of Cotter, planned for the patio in Woolman; and the courtyard gardens at Birmingham and at Goshen. Additional funds for resident assistance are crucial.

building a culture of giving



Top left, health center construction at Kendal at Hanover; bottom left, day care children at Hanover. Top right, Kendal at Oberlin's pool; and bottom right, the BalanceMaster.



Kendal at Hanover

Better Care for All Residents

Revamping and remodeling the Kendal at Hanover health center inspired residents to contribute \$1,065,000 for this purpose in fiscal year 2001. The plans call for improved assisted living facilities and specially adapted environments for those with cognitive impairments. The refurbished wing will also include an indoor/outdoor walking garden. The monies raised directly reduced indebtedness for construction, and consequently the impact of financing on resident fees.

► for the FUTURE: Continued Excellence

Kendal at Hanover's successful fund raising garners mostly anonymous gifts—gifts from residents and others who want the results of their generosity to be that which speaks loudest to future contributors.

Needs to be addressed in the future include the completion of the health center project, and, in light of today's ever-increasing costs, further donations to the Cadbury Fund in support of residents' financial needs.

Kendal at Oberlin

Neighbors Together

Jointly sponsored by the Kendal at Oberlin Residents' Association, Oberlin College, and Kendal Charitable Funds, this grass roots effort provides assistance with home repairs to seniors in the town of Oberlin. Commitment of both time and treasure make the program work.

Balanced Response

Inspired by residents' sense of responsibility to their community, and motivated by several personal experiences with physical therapy, one Kendal resident acted to benefit all. Believing that balance training and assessment equipment would be a very useful tool, the resident researched available programs and apparatus and then donated funds sufficient to purchase a BalanceMaster. The purchase signalled the start of a program of falls assessment and falls prevention research at Kendal. In addition to the research, the BalanceMaster is used in a series of group balance exercise programs meeting several times each week.

► for the FUTURE: Operational Enhancements

Expanded staff education resources; a larger resident assistance fund to expand diversity; an enlarged child day care center; enhanced community space for resident activities such as a greenhouse, wellness center, computer lab and improved TV station; and an outside dining patio are some of the ideas generated by long range planning and a satisfaction survey.



Left, Kendal at Ithaca's gift bus. Top right, Kendal at Lexington, and bottom right, Sunnyside House.

Kendal at Ithaca

Giving Thanks in a Big Way

Each year Kendal at Ithaca residents collect a community thanksgiving offering for donation to local charities. In the three years of this effort's history, \$33,000 has been donated toward such good ends as a brand new bus for the local senior bus service, support for charitable organizations serving families and children, the local hospice residence, and a food pantry in Ithaca. The year's gifts are awarded at a special community gathering in which residents and staff participate. The thanksgiving gift and celebration are the brainchild of one energetic resident who now has many eager supporters and helpers from the Kendal community.

Gerontology Scholarship

A Kendal resident who wished to be an anonymous donor established a \$50,000 Kendal at Ithaca Scholarship at Cornell University's College of Human Ecology. The yearly scholarship is awarded to a student in the Bronfenbrenner Life Course Institute who has hands-on experience in working with seniors and who is planning a career in gerontology. This year's recipient will be honored at a special dinner with Kendal residents.

► for the FUTURE: Assistance Funds

Growth of the fund to assist residents in coming years will be a key to ensuring the growth of a diverse community.

Kendal at Lexington

The Possible Dream Made Practicable

This community owes its life to belief in the soundness of an idea and to belief in the power of philanthropy—both were instrumental in building a continuing care facility in a small town with a small population, but a long and rich heritage and a lot of determination. A small group of original board members and interested people secured over \$1,000,000 in initial capital and 80 acres of beautiful land for a site. Founders, future residents, and interested public supporters made these gifts.

Fred Bartenstein, donor of the land and future resident, has also given separate gifts of \$250,000 toward the rehabilitation and restoration of Sunnyside House, the property's historic farmhouse. Sunnyside was the childhood home of Fred's late wife Isabel, and Fred came to believe strongly the farm would be best used as a retirement community for Lexington, and in Kendal creating the kind of culture that will repay the town handsomely in future years.

► for the FUTURE: Sunnyside, Assistance Funds

Phase II of Sunnyside's restoration will require \$1,000,000. The project will provide guest rooms, common spaces, and a preserved historical site.

The Fellowship Fund at present has \$230,000 earmarked for future potential liabilities of present residents. Kendal's hope is that this fund will grow and enable the admissions of those who may be not fully financially qualified.

fulfill our charitable goals



Kendal at Oberlin residents planting in the new Courtyard Garden.

Examples of gifts practical and temporal, gifts uplifting and soul-satisfying—gifts that honor Kendal's mission.

“Stewart-ship” of Resources

Kendal at Ithaca resident Jack Stewart has become something of an expert in the area of long term care insurance and retirement housing options. He believes so strongly in the Kendal concept that he has been influential in the entry into Kendal at Ithaca of a significant number of satisfied residents.

Jack continues to give generously of his time and expertise in these ways: he volunteers as a health insurance information counselor at the Ithaca Senior Center; he helps people who call on him for advice with regard to long term care insurance; he has repeatedly done great amounts of work to help people who question their ability to afford Kendal to find a way to make their finances work. In addition, he has put men and women in touch with qualified people to assist with the many financial and legal details necessary after the death of a spouse.

Courtyard Garden for Kendal at Oberlin

\$84,329 was donated toward the cost, with \$75,000 coming from two major gifts, and another \$2500 from the residents' association. The cost was just under \$200,000, including expansion of the exercise room and remodeled entrance to Stephens Care Center. Kendal at Oberlin met \$115,000 of the cost as a capital project.

Support for Staff as Need May Arise

The A. & E. duPont Kendal Staff Support Fund honors Kendal at Longwood residents Averell and Edmond duPont, and provides help to staff in times of emergency. *The Robert N. and Lenora C. Zearfoss Endowment Fund for Crosslands Staff Support* was established by Crosslands resident Robert Zearfoss, whose wife Lenora was cared for in the health center.

A Swimming Pool for Kendal at Oberlin

\$425,432 was donated including a gift of \$175,000 from resident Bill Johnson who believed strongly in the project. Pledges were made in the amount \$132,351, and \$228,000 was collected in loans. Kendal at Oberlin paid the remaining \$400,000.

for the FUTURE: Resident Assistance Funds

These funds provide financial assistance to residents who may otherwise be unable to meet full monthly fees. Sources of the funds include gift shop sales, bequests, and a variety of individual gifts. We expect resident assistance funds to grow in importance in coming years as Kendal communities continue to ensure the well-being of current residents, as they further fulfill their commitment to diversity, and as they cope with rising health care costs.

Older, established Kendal communities have made impressive contributions to their assistance funds. The newer communities have started funds and are actively pursuing their growth.

At present, the funds total approximately \$13,250,000.

grants/collaborations



Five who are making a difference: (L to R) Beryl Goldman, Director for Health Services for the Kendal Corporation; PARRI team members Karen Russell, Neil Beresin, Sara Wright, and Janet Davis.

Pennsylvania Restraint Reduction Initiative (PARRI)

This initiative is currently in its fifth year of work supported by grants from the Commonwealth of Pennsylvania and the County Commissioners Association through an Intergovernmental transfer fund.

For the first two years \$382,176 was granted. The work has grown and so have the grants, with \$343,000 granted to the initiative through June 2002.

Initially, PARRI's goal was to assist Pennsylvania long term care facilities in eliminating the use of physical restraints through a train-the-trainer program. Since July, 2000, Kendal's four-person training team has also included assistance with reducing the use of chemical restraints, and preventing resident falls.

To date, 61% of Pennsylvania's 807 long term care facilities have participated in the effort through phone consultation, training programs, and facility meetings with PARRI team members.

a thank you to the PARRI team:

I have to tell you that in the time I've been in long term care the relationship that we've had has been one of the most gratifying experiences of my life. You guys have really spearheaded a change in long term care and it has made it easier to put these things in place and to justify some of the things we were doing which were big changes within a mind-set. We would never have been able to do it without you, and you really have improved the lives of hundreds and hundreds of people across PA. I'm not exaggerating when I tell you it's just been a wonderful educational, personal experience for me to know we've got you and the rest of your team... I just hope that you continue to be the strong advocates that you are...

Janet Brier
Long Term Care Administrator

In receiving and giving grant monies, The Kendal Corporation seeks to be a wise steward of financial resources. Here are three significant grants made to improve health care.

Best Practices Grant

Pennsylvania Department of Health awarded The Kendal Corporation over \$250,000 of a \$980,000 grant to collaborate in a study of best practices in long term care. Duration of the grant is from April 2001 through March 31, 2003.

The project is to (a) determine best practices based on the Resident Assessment Instrument, a mandated national tool for all long term care facilities); (b) design, implement and evaluate best practices pilot projects that will directly address specific quality problems in nursing homes; and (c) document project objectives, procedures and outcomes so that successful pilot projects can be widely replicated. Kendal will hire two health care educators responsible for the implementation portion of the project, the outcome data collection process, and the monitoring system.

Working in collaboration with Kendal are Morrison Informatics, Inc.; Clifton Gunderson, L.L.C., health care reimbursement consultants; John Morris and Katharine Murphy of Boston's Hebrew Rehabilitation Center for the Aged; Brant Fries of The University of Michigan; and Sacunas and Saline, public relations.

Kendal/interRAI Collaboration

Kendal Charitable Funds granted up to \$125,000 for the first year of a collaborative effort to (1) maximize resident function, (2) promote and provide the appropriate mix of services leading to the best outcomes, (3) determine and manage service provision costs, (4) determine needed services and environmental conditions for future community development, and (5) capture a population early in the aging process and track the outcomes of "aging in place."

The grant brings together staff of The Kendal Corporation and staff of *interRAI*, a multinational consortium of researchers, clinicians, and regulators committed to improved care of the elderly through improved assessments and especially in cross-national comparison.

The grant work will cover a period of three years, and further funding from other sources is being sought.

ways of giving

We welcome your gifts to support Kendal's programs and services, and communities through Kendal Charitable Funds. Any gifts earmarked for one organization or program will be allocated according to the wishes of the donor. *Please make your checks payable to Kendal Charitable Funds.*

Outright Gifts of Cash or Securities

An outright gift in the form of cash or securities permits an immediate federal income tax deduction. Gifts of long-term appreciated securities offer additional benefits.

Pooled Income Fund and Trust Arrangements

You may also wish to consider making a gift that will provide you a lifetime income. You may do so through a variety of gift instruments such as our pooled income fund or a charitable remainder unitrust, in which you transfer cash or other assets to our organization but retain an income from the assets for life. Such a gift can be earmarked for any community or purpose you wish. We will be happy to provide you with more information.

Bequests

Another way of giving is through your will. Suggested wording for a bequest might be as follows: "I bequeath to Kendal Charitable Funds, a not-for-profit Pennsylvania corporation, the sum of \$_____ (or % of your estate) to be used for its general purposes (or specify the particular community or purpose you wish to benefit).

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