

2018
ANNUAL
REPORT

Resilience

Kendal
branches out
far and wide.

And, our roots
run deep.

KENDAL®

Together, transforming the experience of aging.®

CALIFORNIA

Enso Village
Healdsburg, California
(under development)

The Admiral at the Lake
Chicago Lakefront

ILLINOIS

OHIO

Kendal at Granville
Granville, Ohio

Kendal at Home
Based in
Northern Ohio

Kendal on Hudson
Sleepy Hollow, New York

Kendal at Ithaca
Ithaca, New York

Kendal at Oberlin
Oberlin, Ohio

NEW YORK

NEW HAMPSHIRE

Kendal at Hanover
Hanover, New Hampshire

MASSACHUSETTS

LATHROP COMMUNITIES
Easthampton, Massachusetts
Northampton, Massachusetts

MARYLAND

PENNSYLVANIA

Chandler Hall
Newtown, Pennsylvania

Barclay Friends
West Chester, Pennsylvania

Kendal-Crosslands Communities
Kennett Square, Pennsylvania

VIRGINIA

Kendal at Lexington
Lexington, Virginia

Kendal Communities
branch out far and wide.

Resilience

- 4 | Barclay Friends Renewal—Cotter Reopens, Construction of Preston Residence to Begin in 2019
- 6 | The Admiral at the Lake Celebrates 5 Years After Reopening as a Kendal Affiliate
- 7 | Chandler Hall Staff Implement Electronic Health Records with Kendal System Support
- 8 | Collington Turnaround Since Kendal Affiliation—Occupancy Up 25%

Branching out far and wide

- 9 | Kendal & SFZC Secure Site for Unique New Community in Northern California
- 10 | The Admiral's Medical Director Attends to Puerto Ricans in Hurricane's Wake
- 11 | Pilot Project to Reduce Isolation and Suicide Among Older Adults Funded by Kendal
- 12 | *Boston Globe* Article Spotlights Vitalize 360
- 13 | Kendal Riverfront Park Draws More Than 30 Hanover-area Rowing Teams
- 14 | Kendal on Hudson Residents' Grants Help Fund Local Charities' Special Projects
- 15 | Generosity in Action—Kendal at Ithaca Residents Donate to Area Agencies
- 16 | Residents' Volunteer Clearing House Strengthens Oberlin Nonprofits

Our roots run deep

- 17 | Special Education Students Learn Essential Job Skills at Kendal at Granville
- 18 | Kendal Residents, Staff Find Mindfulness Improves Well-Being
- 20 | Two Music Grad Students Live Rent-Free as Artists-in-Residence at Collington
- 21 | Cross-campus Collaboration Animates Lathrop Communities
- 22 | Kendal at Lexington Funds Training to Expand CNA Staff
- 23 | Fundraising Extends Reach of Hospice and Palliative Care at Chandler Hall
- 24 | Kendal at Oberlin at 25: Looking Back, Moving Forward
- 25 | Kendal at Home Nurtures Homegrown Leaders
- 26 | Intergenerational Programming Study Cites Two Kendal Communities

2018 ANNUAL REPORT CONTENTS

| | | | |
|---|-------|---|-------|
| Chair of the Board and President and CEO Messages | 2-3 | Kendal Vice Presidents of IT and Health Services Retire | 30 |
| Chandler Hall Selects Dakia McMillian as Executive Director | 7 | Kendal COO Retires | 31 |
| Beth Vettori Named Kendal at Hanover Executive Director | 13 | Community Benefit | 34-35 |
| Kendal System Finances | 27-33 | A Culture of Generosity | 36-37 |
| | | Kendal Leadership, Boards, Addresses | 38-40 |



From the Chair of the Board

The Kendal Spirit

Kendal residents, staff and board members share a strong sense of community and collaboration. We call it the “Kendal Spirit.” There’s a focus on life enrichment, personal growth and on making contributions in the wider world.

As you’ll see in this year’s Annual Report, over the past year the Kendal Spirit manifested itself far and wide.

- Kendal and the San Francisco Zen Center have partnered to create a new type of community in northern California’s Sonoma wine country for older individuals who want to live and age together in an enriching and uplifting setting, with support for wellness, mindful living, meditation, lifelong learning and engagement with the broader community. It will be the first Zen Inspired Senior Living Community in the U.S. The partners have signed a purchase agreement for a 15-acre parcel of land in Healdsburg, California, and formed an independent board of directors for the community. The community will be a Kendal affiliate, and will be part of the Kendal network of senior living communities founded on Quaker principles and values.

- In May, Lathrop Communities cosponsored and provided a 20-strong marching contingent for the 36th Annual NoHo Pride Event and Parade in Northampton, Massachusetts. The event brings diverse communities together to celebrate who they are.
- After Hurricane Maria hit Puerto Rico in September, Dr. Eric Mizuno, Medical Director at The Admiral at the Lake, spent two weeks in Puerto Rico helping those in desperate need.
- In December, Kendal Charitable Funds awarded a \$50,000 Promising Innovations grant to fund a two-year initiative to engage isolated older adults who are at risk for depression, substance abuse and suicide through one-on-one home visits, support groups, educational programs and referrals for needed services. The grant will benefit adults 60 and older living in Prescott, Arizona, and surrounding areas. The program has the potential to be replicated in large and small communities nationwide.
- Vitalize 360, a joint venture between Kendal and Hebrew Senior Life, a Harvard Medical School Affiliate, was described as “transformative” by Dr. Atul Gawande in a Dec. 6 *Boston Globe* feature article. A renowned surgeon and *New Yorker* contributor, Dr. Gawande is an expert on end-of-life care and wrote the best-selling book *Being Mortal*.

We envision the full impact of our work as the transformation of our culture’s view of aging, of older persons and of the potential for fulfillment and continuing contribution during the later stages of life. While remaining firmly grounded in the Quaker values that animate our activities, Kendal continues to move forward.

Joan Countryman, Chair
The Kendal Corporation Board of Directors



From the President and CEO

Resilience

Born of Quaker ideals, Kendal's character draws in equal parts from a real sense of stability balanced by an intense drive for something better. Some might see this notion of stability matched with an embrace of evolution as a contradiction. At Kendal, we view this paradox as a condition to be acknowledged, nurtured and celebrated.

You'll see in this report that Kendal is indeed in a time of transition and change. Radical changes in technology, demography, health care and the sensibilities and expectations of an aging population present challenges and opportunities that are unique in their magnitude. They demand our attention and, in many ways, will demand a different view of how our values are manifest in our work and in our culture.

Like a deeply rooted tree, Kendal continues to branch out, exploring different directions, different spaces, battling for sunlight, creating shade

and comfort, growing, thriving, building strength and resilience, ever-changing but always grounded by its founding principles.

In November 2017, Kendal residents, staff and board members began living out a new paradox together: one of grief and fear coupled with gratitude, transformation and inspiration. A tragic fire at Barclay Friends in West Chester, Pennsylvania, took the lives of four residents and destroyed the Woolman residential living and personal care building. It took our breath away and left families and friends with insufferable losses that will endure forever.

Beginning on that same November night, though, we witnessed acts of courage, heroism and compassion that began with staff, first responders, friends, families and neighbors. The actions and the generosity of the entire Barclay Friends community in no way detracted from the pain but did inspire hope and engender a resilience that will ultimately lead to Barclay Friends' renewal.

There is strength here that shows up at Kendal in different forms each day, always derived from its roots—values that allow for and even embrace paradox. In this field and at Kendal we know well that getting older can and will bring with it changes that are difficult and even disabling. At the same time, we are empowered by the truth that with advancing age there are also immeasurable opportunities for growth, for learning, for giving, for wonder, for love, for resilience and even transformation.

We hope you will enjoy learning in this report more about the people who bring Kendal to life.

Best,

A handwritten signature in black ink, appearing to read 'Sean Kelly', written in a cursive, flowing style.

Sean Kelly
President and CEO
The Kendal Corporation



In the Face of Tragedy, a Path to Renewal



Good Will Fire Company opened its garage bays to collect donations, and they were quickly filled with piles of towels and linens, boxes of toiletries, shirts, pants, socks, soap, shoes and reading glasses. Soon a huge assortment of donated walkers and wheelchairs lined the brick entrance of the fire house.

Barclay Friends, a community with roots planted more than 125 years ago, has long been an integral part of West Chester, Pennsylvania. During that time, it has demonstrated its commitment to West Chester in countless ways. Each year, Barclay Friends provides millions of dollars in community benefit support to West Chester and surrounding communities.

For example:

- In 2016 Barclay Friends provided health care to low-income adults worth \$2,121,733 more than the reimbursement it received from Medicaid for those services.
- Over the past eight years, residents and staff have grown and donated almost 2,000 pounds of fresh vegetables to the Chester County Food Bank.
- For more than 10 years, Barclay Friends has served

as a clinical site for West Chester University's undergraduate and graduate nursing programs.

- In 2016, Barclay Friends teamed up with West Chester University and nine participating local businesses to collect food waste for composting as part of a yearlong pilot study to reduce the volume of waste going into landfills.

When fire struck Barclay Friends Thursday evening, Nov. 16, 2017, the fire quickly went to five alarms, and an estimated 200 firefighters converged on the scene from Chester County and beyond. Despite a swift, effective and compassionate response by first responders, along with Barclay Friends staff and dozens of neighbors from surrounding homes, the loss was devastating.

The community's response was both humbling and overwhelming in the wake of that tragic fire, which

took the lives of four residents and destroyed the Woolman residential living and personal care building. Kendal-Crosslands Communities was one of 32 senior living communities that opened its doors to admit Barclay Friends residents in the wake of the fire.

Good Will Fire Company and Trucks2, a volunteer group devoted to aiding those affected by disaster, played a major role in jump-starting the relief effort. Good Will opened its garage bays to collect donations, and they were quickly filled with piles of towels and linens, boxes of toiletries, shirts, pants, socks, soap, shoes and reading glasses. Soon a huge assortment of donated walkers and wheelchairs lined the brick entrance of the fire house. After Barclay Friends families collected the items they needed for displaced residents, Trucks2 representatives distributed the overflow of donations to 27 local human service organizations.

Kind words and support also emerged from out of state. Hundreds of people and organizations generously gave \$363,000 to help support Barclay Friends' recovery efforts.

"We are thankful and humbled by this incredible generosity," said Linda Sterthous, Barclay Friends' Executive Director. In addition to financial support, LeadingAge—a national association of 6,000+ nonprofit providers of services for older adults—provided funds to purchase 30 new mattresses for Barclay Friends' Cotter skilled nursing neighborhoods, which reopened in April.

The Cotter building was protected by a firewall and had only water damage from the Nov. 16 fire that destroyed the adjoining Woolman building. Cotter, which includes six separate wings, has a system of firewalls intended to limit the spread of fire from one area to another within the building. Cotter has been repaired and renovated, and

Barclay Friends was able to welcome residents home beginning April 2, 2018.

"While we continue to carry those in our hearts who lost so much, we are grateful to be able to welcome back many community members to Barclay Friends," Linda said. "The entire Barclay Friends team cherishes the confidence our families continue to hold in us."

A separate project team is focused on designing a new residential living, personal care and memory care facility to be built where the Woolman building once stood.

"We hope to begin construction sometime in 2019," Linda said, "so that Barclay Friends can renew its mission to care for individuals who need assistance with daily living in the West Chester area."



The Admiral at the Lake Celebrates 5th Anniversary of its Rebirth



When the 31-story Admiral at the Lake opened its doors on Chicago's North Side in July 2012, it already had a 154-year history in the city. As

Chicago's longest serving senior living provider, The Admiral at the Lake learned to adapt and reposition itself repeatedly to create new levels of service and care.

When it announced in 2009 that it would be collaborating with Kendal on its redevelopment plans, The Admiral gained a strong partner that helped secure long-term bond financing for its new high-rise home on Chicago's lakefront in the midst of an especially nasty economic downturn, "The Great Recession."

Kendal's nationally recognized expertise and leadership in the development and operation of not-for-profit life plan communities also proved to be critical to The Admiral's sales and marketing efforts. Three-fourths of its 200 residential apartments were reserved when The Admiral opened in 2012.

The collaboration worked because Kendal's values resonate deeply with those held by The Admiral and its board, staff and residents. The Admiral has a long history of serving older adults of all faiths and nationalities, and it shares

Kendal's commitment to resident leadership in planning the life of the community.

When plans were being made to celebrate the fifth anniversary of The Admiral at the Lake's renewal, the Executive Team worked closely with residents to plan a party that would be appealing to everyone, and the entire community came together to throw a party on July 21, 2017.

"Several hundred people attended the party, which stretched from one end of the sixth floor to the other, including The Harbors health care center," recalls Nadia Geigler, The Admiral's Executive Director. "We had musicians playing on one of the outdoor terraces, and there were food and beverage stations set up all along the indoor and outdoor spaces.

"We also had on display in one of the common areas a number of pieces from the old Admiral building and from the construction of the new Admiral, including two grandfather clocks, resident handbooks dating back to the 1930s, architectural drawings and blueprints, along with shovels and hard hats from the groundbreaking ceremony in 2009," Nadia says.

"The Residents Association contributed to cover the cost of refreshments, and community members contributed their time and talents to the party by decorating, creating flower arrangements, cooking and baking, taking the lead on employee recognition, party planning and shopping. And staff created videos about what makes The Admiral a great place to work. It was truly an event for the community by the community," Nadia says.



Kendal at Longwood RN Jason Eldridge (standing left) and MatrixCare Clinical Consultant Jennifer Narewski (standing right) teach Chandler Hall staff members Karen Fatula, Registered Nurse Assessment Coordinator; Bich Bui, Medical Records; and Charlene Kirby, Registered Nurse Assessment Coordinator, the ins and outs of electronic health records.



Chandler Hall Staff Implement Electronic Health Records with Kendal System Support

Making the transition from paper to electronic health records can be challenging for even the most experienced clinicians. To ensure that Chandler Hall staff were well-prepared when their new MatrixCare electronic health record system went live in March, super users from three Kendal affiliates came on-site in February to help ease the transition.

"I'm living at Chandler Hall these days," said Elaine Jackson, Kendal's Application Support and Training Specialist. "Since I'm not a clinician, I reached out to the MatrixCare super users at nearby Kendals."

Nurses Jason Eldridge from Kendal at Longwood, Sue Daley from Kendal on Hudson, and Loren Hibbert and Justina DiRocco from Barclay Friends came to Chandler Hall to help with the training and the order entry.

"It was awesome," Elaine said. "They were able to share

how they use MatrixCare for specific scenarios, such as documenting behaviors or anticoagulants. Often it developed into a discussion that led to a model practice recommendation for Chandler Hall."

Besides being tutored by four Kendal super users, Chandler Hall staff also received three days of training from Jennifer Narewski from MatrixCare. She trained staff on the physician orders and pharmacy Interface and then how to enter orders in MatrixCare and transcribe orders imported from the pharmacy.

"Everyone benefited from this knowledge exchange, not just Chandler Hall," Elaine said. "It was an opportunity for the super users to learn from the best, including Jennifer from MatrixCare, and we all discovered new parameters, new functionality and recommended practices to take back to all Kendal Affiliates."

Chandler Hall Selects Dakia McMillian as Executive Director



Chandler Hall's Board of Directors announced it selected Dakia L. McMillian—longtime Vice President/Administrator of The Evergreens in Moorestown, New Jersey—to lead Chandler Hall as its Executive Director

Dakia has 20 years of experience in nursing and is both a Licensed

Nursing Home Administrator and a Certified Assisted Living Administrator. From 2001 to 2008, she served as Director of Nursing at The Evergreens, a Life Plan community in Moorestown, New Jersey. In 2008, she became Vice President of Health Services there. In that position, Dakia supervised health care delivery and quality improvement, and was responsible for regulatory compliance, recruitment, staff education and budgeting.

"I am thrilled to be part of the Chandler Hall team," Dakia said. "My career has been dedicated to enhancing the lives of older adults, and I look forward to continuing that work with Chandler Hall and Kendal as we embark on this new journey together."

Dakia began her career as a staff nurse in 1998 at Our Lady of Lourdes Medical Center in Camden, New Jersey. From 1999 to 2001, she was Unit Manager/Director of Nursing at The Fountains at Cedar Parke, a Life Plan community in Atco, New Jersey.

In 1998, Dakia received her diploma as a Registered Nurse from the Helene Fuld School of Nursing, and in 2005 she graduated from the University of Delaware with a Bachelor of Science in Nursing degree. Currently, she is completing work for her master's degree in nursing at Thomas Edison State University in Trenton, New Jersey.

Swimming Upstream

Collington Turns Survival into Strategy

More than 95 percent of Collington's cottages and residential apartments were occupied in December 2017. "When it first affiliated with Kendal in June 2011, though, it's fair to say Collington had just about hit rock bottom," says Executive Director Marvell Adams.

Before its affiliation with Kendal, Collington had:

- Less than 70 percent of its 360 residential/independent living cottages and apartments occupied.
- No permanent Executive Director, Chief Financial Officer or Marketing Director.
- Technical defaults on its debt.
- Millions of dollars in deferred maintenance.

Despite these drawbacks, Collington joined the Kendal System and continued as an independently owned and operated, not-for-profit organization governed by its own volunteer Board of Directors. Under the affiliation agreement, Kendal began providing support services to Collington in the areas of operations, finances, facilities, information technology, planning and marketing.

"Nothing has been more positively decisive than our affiliation with Kendal. At every level, our expectations have been exceeded," Paul Cooney, then Chairman of Collington's Board, stated in a letter to Kendal six months after the affiliation.

Collington's affiliation with Kendal helped to draw many new residents to its idyllic 125-acre campus in suburban Washington, D.C.

"Kendal's values were a major factor in our decision to come here," said Kathleen Gordon, who moved to Collington with her husband in March 2012 from the Philadelphia area. "It was a very

positive factor in our decision."

Two months after its affiliation with Kendal, Marvell Adams took the helm as Collington's new Executive Director. "I can't begin to say just how tremendous the Kendal affiliation has been for me as an Executive Director and for our organization," Marvell said as he neared the end of his first year at Collington. "Plus, the fact that I can pick up the phone and call any one of nearly a dozen 'brothers and sisters' who are facing similar challenges is invaluable."

Being connected with Kendal enabled them to expand their geographic reach by inviting prospective residents to presentations about Collington at locations close to their homes.

Collington's innovative Renaissance Program—allowing new residents to combine cottages and create larger residences with open floor plans—was hugely popular. The program began with a goal of 12 Renaissance conversions. There are now more than 40 Renaissance combinations on campus.

Another key to the turnaround was the investment of more than \$30 million in infrastructure—addressing 10 years of deferred maintenance—included in Collington's 2013 strategic plan. Major investments included:

- Complete replacement of heating, ventilation and air conditioning systems.
- New cottage and apartment roofs.
- New asphalt.
- Addition of a second dining venue, which opened in January 2018.

- New fire suppression sprinkler systems.
- An upgraded telephone system.

Short-term debt restructurings in 2014 allowed Collington to refinance its variable rate bonds at lower interest rates and secure a construction loan to help pay for major infrastructure upgrades. In 2016, Collington began renovating many studio and one-bedroom residences, making them more attractive to prospective residents and reducing vacancies by one-third by the end of 2017.

Collington culminated its turnaround in May 2017 by refinancing its variable-rate debt with \$64 million in long-term, fixed-rate bonds. In announcing the sale of the bonds, Ziegler, a specialty investment bank, stated that: "The Collington and Kendal organizations have been extremely successful affiliation partners and the favorable bond pricing reflects the strong management teams in both organizations."

"This financing is the culmination of several years of hard work and determination by our board, residents and staff to improve all aspects of Collington," Marvell said. "It represents our greatly strengthened financial position and provides a foundation for even stronger performance into the future."

Collington is celebrating its 30th anniversary in 2018 and has drawn on the ideas of residents, staff and board members to develop a new five-year strategic plan and a new mission statement: "Creating community for older adults and all they care about inspired by vision for purposeful lives."





Zen Inspired Kendal Planned for Northern California

Kendal and the San Francisco Zen Center have partnered to create a new type of community in northern California's Sonoma wine country for individuals 60 and older who want to live and age together in an enriching and uplifting setting, with support for wellness, mindfulness, meditation, lifelong learning and engagement with the wider world. It will be the first Zen Inspired Senior Living Community in the United States.

"Kendal and San Francisco Zen Center are committed to a community rooted in the fundamental values of kindness and compassion and to creating a special place to 'live lightly on the land' in a beautiful setting," says Sean Kelly, Kendal's President and CEO.

The partners have signed a purchase agreement for a 15-acre parcel of land in Healdsburg, California. Envisioned as part of a master-planned development, it will offer residential living along with assisted living and memory care to support residents as their health care needs change. The community will be a Kendal affiliate, and will be part of the Kendal network of senior living communities founded on Quaker principles and values.

The San Francisco Zen Center selected Kendal as its partner because of the organization's long track record of operating successful older adult communities that encourage lifelong learning and engagement and ensure community members are honored and are supported at every stage of their lives.

"We will foster a spirit of inclusion to attract a diverse population with a wide

range of interests," says Susan O'Connell, Spiritual Director of the Zen Inspired Senior Living Project for San Francisco Zen Center. "In addition to the Zen offerings such as daily meditation and dharma talks, community members will be free to organize all aspects of their social, intellectual, cultural and spiritual lives."

The partners have settled on **Enso Village** as the name for the community. The term is connected to the practice of meditation and mindfulness, which Suzuki Roshi brought to the Bay Area. San Francisco Zen Center's logo includes an enso painted by Suzuki Roshi. Painting an enso is an expression of being fully present in the moment—lifting the brush from the ink and making a circular stroke in one breath. It captures the fundamental intention of this new community—living in community together and being fully present with each other.

"Kendal and the San Francisco Zen Center understand there is an acute need for older adult housing in northern California," O'Connell says. "Finding an experienced partner like Kendal whose values align with those of San Francisco Zen Center was critical. Now that we have secured the land, and secured seed money, we are eager to re-engage the design and approval process for this unique community."

The San Francisco Zen Center, which has been operating in San Francisco since 1962, has contemplated the creation of a Zen Inspired Senior Living Community for many years. Construction is anticipated to begin in 2020 with the property opening for residency in 2022. For additional information, visit enso.kendal.org.



The Admiral's Medical Director Attends to Puerto Ricans in Hurricane's Wake

We can't land at Puerto Rico's Ponce airport because of hurricane damage. We can't help people living in the mountains because the roads are hazardous. We can't help an infant who might need surgery because we only have medications.

The list of "can not's" are endless when it comes to disaster relief, but not to Dr. Eric Mizuno, Medical Director at The Admiral at the Lake. "Can't is not in my vocabulary," Dr. Mizuno says.

Dr. Mizuno is not affiliated with a rescue organization, but instead travels solo so he can be flexible and head to areas he believes are in greatest need of medical care. He traveled to New Orleans after Hurricane Katrina, and to Haiti after the 2010 earthquake. When Hurricane Maria hit Puerto Rico in September 2017, his "DNA" kicked in and he got a seat on the first private plane to land in Ponce.

Puerto Rico is important to Dr. Mizuno for another reason. He is an internist and works in the Puerto Rican neighborhood of Humboldt Park in Chicago. That personal connection came into play a couple of days after he arrived in Ponce, the second most populated city after San Juan. The devastation was horrible, but not catastrophic. Residents had cleared the roads of debris and hospitals were operating on generators.

"My mission was to find the people who needed us most. In the mountains there are fewer people, but the need is greater," he says. "For me, everything is God-driven."

He hitched a ride with a national organization and headed into the mountains, traveling over muddy, flooded and debris-covered roads. They stopped at a

juncture and learned of a very sick infant further up the mountain who needed help.

A Puerto Rican man stopped Dr. Mizuno to ask, "What are you doing here?" Dr. Mizuno explained he was a doctor from the United States. The man, Patrick, knew who Dr. Mizuno was. Before retiring to Puerto Rico, Patrick lived in Humboldt Park. "You were my doctor," Patrick said. The infant in distress was Patrick's grandson.

Dr. Mizuno hopped in Patrick's Jeep and they headed up the mountain. Thankfully, the infant's condition was not life threatening and Dr. Mizuno was able to help with medication.

Back in Chicago, Dr. Mizuno likes to use his medical mission trips as teachable moments with students at Northwestern University Medical School, where he is a clinical assistant professor of medicine.

"Ask yourself each day, 'Who am I supposed to be helping today?'" he tells students.

For two years, Dr. Mizuno has been helping residents at The Admiral at the Lake, as well. He was introduced to the community by his mentor and The Admiral's former medical director, Dr. Bob Perlmutter.

"As they say, you learn more than you give. I'm in my 50s and I see the pain families go through with their loved ones who have dementia and/or are dying. I've learned from the eloquence that patients and families have shown me. Sometimes they are comforting me in their time of greatest need," Dr. Mizuno says, adding, "The Admiral is a very special place."

Kendal Funds Effort to Reduce Isolation and Suicide Among Older Adults

In December 2017, Kendal Charitable Funds awarded a \$50,000 Promising Innovations grant to fund a two-year initiative to engage isolated older adults who are at risk for depression, substance abuse and suicide through one-on-one home visits, support groups, educational programs and referrals for needed services.

The grant will benefit adults 60 and older living in Prescott, Arizona, and surrounding areas in Yavapai County by allowing the West Yavapai Guidance Clinic Foundation to greatly expand its Senior Peer Prevention Program.

"With this grant we intend to nearly double participation in the Senior Peer Prevention Program from 1,161 today to 2,000 seniors over the next two years," says Laura Norman, Chief Development and Communications Officer for the Clinic and Executive Director for its Foundation. "Some of the best protective factors against depression, substance abuse and suicide among elders are increased feelings of connectedness and support from ongoing relationships, which is what the Senior Peer program provides."

Because of its moderate climate, at an altitude of about 5,300 feet, Yavapai County is a popular retirement destination in northern Arizona. In fact, adults over 65 make up 29 percent of the population, compared to a statewide average of 16 percent. However, the age-adjusted suicide rate in Yavapai County is 32.8 per 100,000—more than twice the national average.

"We draw a straight line between isolation, depression and suicides," Norman says. "About 90

percent of those over age 65 say they want to stay in their homes and age in place, but someone who ends up living at home alone can become disconnected from everything. Older adults typically enroll in our program when chronic health issues, the loss of a spouse or some other significant life change increases their feelings of vulnerability and isolation."

"With this grant, the West Yavapai Guidance Clinic Foundation will be able to greatly expand the reach of its Senior Peer Prevention Program, enabling many more older adults to age in place without being isolated," James Dowell, chair of Kendal Charitable Funds, said in announcing the award. "This program has the potential to be replicated in large and small communities nationwide."

Those who volunteer to serve in the Senior Peer program have a training manual for reference, are coached on what to expect during their weekly visits and are trained in nonjudgmental listening and goal setting.

"The commitment involved in being a Senior Peer volunteer is substantial," Norman says. "It's not so much the time it takes—an hour or an hour and a half a week, plus the time it takes to document the visit—it's a commitment of the heart beyond the commitment of time."

Volunteers are carefully screened and interviewed, and they are finger printed and undergo a criminal background check before they are accepted into the program.

"When you're dealing with vulnerable older adults and you're sending volunteers into their homes, you want to make sure you've done your due diligence,"



Norman says. "The more volunteers we have, the more we will have to spend on finger printing and background checks, which the Kendal grant will help pay for, along with reimbursements for mileage for volunteers."

The effectiveness of the expanded Senior Peer Prevention Program will be evaluated based on ongoing measurements of connectedness and mood.

A panel of leading experts on aging selected the Senior Peer Prevention Program proposal for funding from among 280 letters of intent and 12 finalists from across the nation. Promising Innovation grants provide seed money for the creation of new services that are in keeping with Kendal's values and practices.

"Kendal's pursuit of better ways to address the unmet needs of older adults, coupled with the generosity of the Janet Comey Foundation, Kendal residents, board members, staff and others outside Kendal, led to the creation of the Lloyd Lewis Promising Innovations grant program," said Beverly Grove, Executive Director of Kendal Charitable Funds. "Promising Innovations grants provide an opportunity for greater collaboration among those of us who seek to improve the quality of life and care for all older people."

The Boston Globe

Article spotlights Vitalize 360

An article posted online Dec. 6 by the *Boston Globe*, quotes Dr. Atul Gawande, author of *Being Mortal* and an expert on end-of-life care, as calling the Vitalize 360 approach “transformative.”

Titled “By helping seniors set life goals, coaches motivate them to get stronger and live well,” the article notes that Vitalize 360 (vitalize360.org) is a joint venture between Kendal and Hebrew SeniorLife, a Harvard Medical School Affiliate.

Vitalize 360 recognizes that “even as you may have health issues and frailty and the difficulties that can come with aging . . . people have lives worth living. And, in fact, have a lot more life worth living,” Gawande says.

To read the article online, go to: <https://tinyurl.com/yarlvw2c>



The power of wellness.



Kendal Riverfront Park Draws Rowing Enthusiasts



When it opened in May 2017 on land owned by Kendal at Hanover, Kendal Riverfront Park gave the public easy access to the Connecticut River. The river runs nearly straight and is roughly one-third mile wide along the 10.7 acres of park land on its banks. This stretch of the river is ideal for rowers and is frequently used by crew teams hosting high school and college regattas. Before the 2016 Summer Olympics in Brazil, the U.S. Women's Rowing Team practiced there.

In 2013, Kendal at Hanover bought the property, which had long been owned by a motel, because it was adjacent to the community. Once the property was purchased, it was clear how valuable its waterfront access could be to the broader community, as well as Kendal residents. The site has a long dock, large gazebo and road access that are ideal for rowing competitions, as well as for recreational river users.

"We had long hoped for more active public access," said Julia Griffin, Hanover Town Manager. "It is such a lovely riverfront parcel."

In December 2016, Kendal at Hanover partnered with the Town of Hanover in a license agreement for public use of the property. Over the past year, this partnership has allowed countless families and more than 30 area crew teams, and their cheering fans, to benefit from their access to Kendal Riverside Park.

Under the terms of the licensing agreement with the Town of Hanover, members of the public are able to park in the upland portion of the Park and use the existing boat launch for access to the water. Hanover Parks and Recreation operates and maintains the property for public access from dawn until dusk, and Kendal at Hanover residents can freely use the land for special events.

Kendal at Hanover Names Beth Vettori Executive Director



Beth M. Vettori joined Kendal at Hanover in April 2018 as its new Executive Director. She succeeded Rebecca A. Smith, who held the position from 2005 until she retired in February 2018.

Beth came to Hanover after serving as Executive Director of Rockridge Retirement Community

in Northampton, Massachusetts, since 2007. She was recently promoted to the role of Senior Executive Director for Rockridge and Deaconess Abundant Life Communities.

"Beth brings a wealth of experience from within the retirement community setting, as well as civic engagement in the broader community," said Anne Page, Chair of the Board of Directors. "The Search Committee felt an immediate connection with Beth and her affinity for our values and practices."

As Executive Director at Rockridge, Beth provided focused leadership to a staff of more than 90 employees and worked closely with over 140 residents. She was critical in a multi-million-dollar expansion from 2015 to 2017 at Rockridge related to its strategic plan.

"Kendal at Hanover is a unique and very impressive Life Plan community that is part of a well-respected Kendal System that I have enjoyed learning from for many years now," Beth says. "When I visited Kendal at Hanover in December, I not only was able to immediately see why Kendal is a leader in our field, but I also took an instant liking to the charm and character of the Upper Valley."

Kendal on Hudson Residents' Grants Help Fund Local Charities' Special Projects



The Kendal on Hudson Residents Association has been helping to fund local community projects since the retirement community opened in 2005. It earmarks about 30 percent of its annual appeal contributions to support local charitable organizations that serve residents of Sleepy Hollow and Tarrytown, New York.

Here's how the process works: The Residents Association's Local Charities Committee invites local nonprofit groups that meet its criteria to submit a request to fund or partially fund a special project. The committee then makes recommendations to the Residents Association, which typically donates \$12,500 annually—in grants ranging from \$500 to \$1,500—to about a dozen nonprofits.

Among the projects funded in 2017 were the Sleepy Hollow Fire Department's wellness program for its volunteer firefighters, and the Warner Library's updating of signage for its many Spanish-speaking patrons.

"When we moved here in 2016, we discovered what a compassionate community Kendal on Hudson is, not only within Kendal but also in the surrounding area," says Anne White, who chaired last year's Local Charities Committee.

Kendal and local organizations have a history of working together through many civic and social interactions, including volunteering. "This

grant program enhances that relationship," says Harriet Barnett, the current chair.

In an effort to further strengthen community ties, the committee recently invited a few organizations to share their stories with residents. So far, six have visited.

The presentations give residents a chance to hear about projects funded in the past, and to learn more about essential services provided to their neighbors, especially low-income immigrants from Ecuador and other Spanish-speaking countries.

One of the speakers was Sister Susan Gardella, executive director of the RSHM Life Center, which offers a range of educational and social services for low-income children and families. In 2017, Kendal's \$1,250 grant helped fund a day trip for 62 children to see "Disney's Aladdin" on Broadway. The trip was a unique experience for the children, most of whom had never been to a show or visited New York City, just 25 miles away. "I think that was important in opening the children's minds to a broader world," said Harriet.

One organization familiar to Kendal residents is the Warner Library, which prepares bags of books requested by residents for weekly pick up by Kendal drivers. Along with the signage grant, the Residents Association recently donated money to help renovate a much-needed community meeting room overlooking the Hudson River.

Anne and Harriet say working on the Local Charities Committee is a very pleasant task: They get to advise on giving money away to support Kendal's nonprofit neighbors.



Cornell University Student Awarded Kendal at Ithaca Scholarship

Matthew Avila, a senior in the Department of Human Development at Cornell University, was awarded the 2017 Kendal at Ithaca Scholarship for students interested in pursuing a career in gerontology. The scholarship was established 17 years ago by an anonymous Cornell alumnus living at Kendal at Ithaca, which is located a mile

from the Cornell campus.

Avila is working on a gerontology minor as part of his bachelor's degree and plans to pursue a career researching the relationship between aging and disease.

"I want to explore the idea that growing old and disease are two separate constructs," Avila said. "In other words, I will use the knowledge I gain from gerontology to fight against the stigma of aging, reduce age-related bias in my research, make accurate conclusions about the aging population and produce good science."

"What impressed the jurors about Matthew's application is his continuous engagement with gerontology across multiple areas ranging from formal classwork to research and volunteering," says Corinna Loeckenhoff, director of Cornell's Gerontology Minor Program and Avila's honors thesis adviser.

At Cornell, Avila is involved with the Alzheimer's Help and Awareness Club, a team of students dedicated to raising public awareness about Alzheimer's disease and supporting Alzheimer's patients. And last summer, he was a research assistant at Duke University's Center for Cognitive Neuroscience, where he worked on a brain-imaging study to examine how older adults who suffer from depression regulate their emotions.

Generosity in Action at Kendal at Ithaca

Nearly 20 years ago, Kendal at Ithaca residents decided that they would like to establish a way to thank and recognize, as well as support, other not-for-profit organizations in Tompkins County, New York. They wanted to be good neighbors in the community and alert others to the various groups that provide services to many. That first year, \$7,800 was given to a single not-for-profit, Gadabout, a voluntary transportation service for older and disabled residents of Tompkins County.

"Each September, the residents' Interfaith Activities Committee accepts donations that will be designated for two local not-for-profit organizations. Then, at Kendal at Ithaca's annual Thanksgiving service of songs and readings, the residents' financial contributions are awarded to the selected organizations," says Betsy Schermerhorn, Director of Marketing and Admissions. "Since the program began, more than \$300,000 have flowed to nearly 30 agencies in the community through the generosity of Kendal residents."

The list of recipient organizations includes many that operate very quietly and may otherwise go

unnoticed. The agencies recognized by the Kendal at Ithaca Residents' Association in 2017 were the Women's Opportunity Center (WOC) and the Immigration Services Program (ISP) of Catholic Charities. Each received a donation of \$9,500.

WOC is a local nonprofit organization, founded 38 years ago, dedicated to helping low-income women overcome obstacles to employment. WOC offers individual career counseling, job search assistance, introductory computer classes, interview and work clothing, scholarships to help pay for transportation expenses and other resources that can eliminate barriers to employment.

Since 2007, ISP has sponsored a program that ensures its clients can access community resources despite language and/or cultural barriers, as well as providing access to affordable legal immigration services. ISP has been recognized by the Board of Immigration Appeals as a nonprofit agency that can provide legal advocacy for those it serves. In addition, ISP also provides citizenship and naturalization services that target the elderly, low-income individuals and those receiving public assistance.



Volunteers Larry Dunn (second from left) and Arlene Dunn (right) plant fruit trees with community members in the Oberlin City Community Garden. The six trees, donated by Kendal at Oberlin's John Bartram Arboretum, will provide fresh fruit to families in need.

Residents' Volunteer Clearing House Strengthens Oberlin Nonprofits

Betty and Joe Verlie joined 300 other older adults hailing from as many as 29 different states who moved to Kendal at Oberlin when it first opened 25 years ago.

With so many people relocating far from their long-established community connections, the Verlies knew that meaningful new activities would be critically important. Their solution—matching residents with volunteer opportunities in the larger Oberlin community—became a new organization under the Verlies' leadership, Kendal at Oberlin's Volunteer Clearing House.

A survey of residents catalogued their interests and talents, and a survey sent to all nonprofit organizations in Lorain County, Ohio, determined the unmet needs that Kendal residents' time and talents might address. Betty also recorded all the agencies aided and activities undertaken by the resident volunteers, including the hours spent.

The reputation of the Volunteer Clearing House has been well established for decades now, and

Betty and Joe would be amazed at the number of residents, who over the years have the benefit of serving others in meaningful roles, both within the Kendal community and the larger community. Residents are finding their passions through volunteering, and collaboration with the organizations served continues to grow.

In 2017 Kendal residents and staff volunteered a total of 62,416 hours! With hours increasing annually more needs are being met.

A sampling of the diverse organizations that have been served includes: Meals on Wheels, Oberlin Schools, Lorain County Free Clinic, Community Foundation of Lorain County, Oberlin Heritage Center and Oberlin Community Services.

Rey Carrion, Kendal at Oberlin Facility Services Director, has served on the Community Foundation of Lorain County Board since 2014. Rey is quoted as saying, "Let your actions speak for you and make a difference".

Resident Randy Wagner also is a Director of the

Community Foundation of Lorain County, and he is involved with his family's Fund, which supports causes in the county. Randy credits his parents for modeling a sense of generosity for him and his sister.

Residents, Arlene and Larry Dunn, are stewards of the John Bartram Arboretum at Kendal at Oberlin. Their dedicated, hands-on work has created connections with the city and opportunities for internships for Oberlin College students.

Resident Bob Cothran has been the large project go-to-person, painting murals, designing and building sets and sharing his skills with high school and college students.

"It's just that there is some kind of difficult-to-define ongoing vitality that seems to pervade both Kendal and Oberlin that's like the air; you just breathe it without thinking or intending," Bob says. "It's as though the atmosphere was charged with invisible but irresistibly intriguing possibilities; not exactly jobs or projects or clearly identified causes (although there are plenty of those) but just possibilities."

Kendal at Oberlin has encouraged community engagement since its inception, recognizing that organizations and lives are enhanced by sharing with others.



Special Education Students Learn Essential Job Skills at Kendal at Granville

Kendal at Granville has partnered with a local organization to help individuals with special needs transition from their teen years to adulthood. Will Solivan, Director of Residential Services, has been instrumental in leading the efforts and partnership with Individualized Transition Education to Careers (ITEC)—a local organization serving special education students.

“This program is about identifying opportunities for the students to develop skills that prepare them socially and professionally to perform successfully in the workplace,” says Will, who serves on ITEC’s Advisory Board.

ITEC’s program is based on the belief that all people should live as independently as possible and that obtaining and maintaining employment is integral to achieving independence. Students come two times a week to Kendal at Granville and rotate job duties to expand their learning. Most responsibilities involve housekeeping duties, but some students also work in dining services. The work schedules complement their academic classes, another important component of the program.

“These hands-on job experiences allow the students to learn the work ethic without fear of mistakes and facing consequences,” says Bruce Piper, ITEC Job Coordinator. The ITEC program helps students learn what is acceptable in the workplace and what is not, he says, so they can be successful as adults.

ITEC’s intensive work training program is designed to give students the maximum possible amount of work exposure in community businesses.

Kendal at Granville is one of seven businesses that participate in the program. Over the course of one school year, each student has the opportunity to be trained by employees in three different types of businesses for three months at a time. The students learn what it takes to get and keep a job.

“Keeping their focus can be very challenging for these students,” Will says. “Kendal at Granville provides a supportive learning environment that’s a critical component in helping them to develop the concentration needed to work a full shift.”

As the Job Coordinator, Bruce develops a Transition Plan for each student that emphasizes his or her independence. He assesses each student’s skills and interest at the start of the program, the middle and then at the end. Developing the workplace skills needed in a paid position is the overriding goal, and the Job Coordinator works with the students, their families and agencies to find paid positions for those who complete the program.

ITEC succeeds in placing 51 percent of its students in the workplace, Bruce says, noting that “Kendal at Granville has played a valuable role in making this program a success for the students and their families and has offered paid employment.”

“We are committed to sharing our resources and building and maintaining relationships in our larger community,” says Doug Helman, Kendal at Granville’s Executive Director. “We support ITEC’s program because we believe that everyone should have the opportunity for growth and lifelong learning.”



Kendal Residents, Staff Find Mindfulness Improves Well-being

Over the past decade, residents and staff in more than a half dozen Kendal communities have adopted a variety of mindfulness-based practices—including meditation, yoga and tai chi—to reduce stress and enhance well-being.

Jefferson Health System's Myrna Brind Center for Integrative Medicine has conducted research in 2017 on the effectiveness of mindfulness at reducing stress among residents of Kendal-Crosslands Communities. Two staff and 75 KCC residents have participated in three rounds of Mindfulness-Based Stress Reduction (MBSR) programs offered there by the Philadelphia-based Brind Center. In November, Dr. Andrew Newberg presented results of their MBSR research to KCC residents.

Mindful breathing, gentle touch and essential oils are bringing comfort and healing to residents and staff at Kendal at Granville. "At first everyone was skeptical," Director of Nursing Krystal Etters says about the Kendal at Granville's Urban Zen Program. A woman trained in the gentle healing therapies of yoga, essential oils and Reiki was hired to come to the community a couple times a month. Now she's a popular visitor at Kendal at Granville and everybody asks when she's coming back, Krystal says.

Yoga therapy involves gentle movements and breathing exercises that can be done in a bed or chair. Reiki is a Japanese technique of light touch, on or near the body, that helps reduce stress and promote relaxation and healing.

Kendal at Oberlin offers tai chi classes on land and in the water. Often described

as meditation in motion, tai chi involves a series of slow-paced movements, accompanied by deep breathing. The benefits of tai chi include increased flexibility and balance and decreased stress and anxiety. Studies have shown that tai chi can reduce falls among older adults by up to 45 percent.

Fortune 500 companies like Google, General Mills and Black Rock offer mindfulness training to enhance focus, decision-making and productivity. A course called M-Fit has been taught to Marines in order to strengthen their resilience in combat, and both yoga and meditation are used at Walter Reed Army Medical Center to treat post-traumatic stress disorder. Early research suggests that regular mindfulness practice can help older adults sustain cognitive function and slow memory loss.

Research also indicates that consistent mindfulness practice can create long-lasting changes in the brain. "The best data shows powerful impacts from meditation right from the beginning. The more hours of practice you accumulate, the stronger the benefits," says Dr. Daniel Goleman, co-author (with Dr. Richard Davidson) of *Altered Traits: Science Reveals How Meditation Changes Your Mind, Brain, and Body*.

"It's gratifying to see how mindfulness practice strengthens Kendal culture as residents and staff grow more resilient in the face of stress. There's less conflict, more cooperation and kindness toward self and others," says Laura Peters, Human Resources Development and Learning Manager at Kendal at Ithaca.



Laura began teaching Mindfulness-Based Stress Reduction (developed by Dr. Jon Kabat-Zinn at the University of Massachusetts more than 35 years ago) in the wider Ithaca community in 2007. Residents and staff expressed an interest in taking mindfulness classes, so Laura began teaching a six-week modified form of MBSR in 2012. Learning simple practices in a supportive group setting, participants reported benefits including improved sleep, lower blood pressure, greater self-control, improved digestion and less pain.

Laura shared these results with wellness and Human Resources leaders across the Kendal System and gathered information about their mindfulness offerings. She also began delivering a mindfulness presentation annually to Kendal Leadership Fellows. As information about mindfulness' benefits becomes public knowledge, interest is growing among Kendal Affiliates.

In 2015, Barclay Friends' Social Work Director, Kimberly Coder Bernardi, reached out to Laura, expressing interest in offering classes to her community's assisted living residents. Laura, in turn, connected Kim with Lucia McBee, author of Mindfulness-Based Elder Care. This yearlong mentoring relationship bore fruit in 2016 at the LeadingAge National Conference in Indianapolis, where the three presented "The Art of Mindfulness: Cultivating Well-being" to an audience of 120. It was the organization's first presentation on mindfulness.

In May 2017, Laura presented an overview titled "Cultivating Mindful Living in Kendal Affiliates" to representatives of the San Francisco Zen Center who are

collaborating with Kendal on developing a Zen-inspired community for older adults in northern California. The ensuing discussion focused on the Zen concept of "contemplative care" and similarities between Quaker and Zen values.

Kendal Affiliates Offering Mindfulness-Based Practices

| | Meditation | Yoga | Tai Chi | Reiki |
|-------------------------------|------------|------|---------|-------|
| The Admiral at the Lake | | X | | |
| Barclay Friends | X | | | |
| Chandler Hall | | X | | |
| Collington | | X | X | |
| Kendal at Granville | | X | | X |
| Kendal at Hanover | X | X | X | X |
| Kendal at Ithaca | X | X | X | |
| Kendal at Oberlin | X | X | X | X |
| Kendal-Crosslands Communities | X | X | X | X |
| Kendal on Hudson | | X | X | |
| Lathrop Communities | X | X | X | X |



Two Music Grad Students Live Rent-Free as Artists-in-Residence at Collington

Collington and the University of Maryland School of Music (SOM) have partnered to create a student artist residency program that brings together two different generations through music. Beginning in August 2017, SOM graduate students Samantha Flores and Matthew Rynes received free room and board at Collington in exchange for performing regularly and organizing additional concerts and educational programs for residents.

"The artist residency at Collington affords students the chance to connect in meaningful ways with a distinct segment of our community and compels them to think about how we use music to engage with specific audiences," says SOM Director Jason Geary. "It's important that students understand fully the role that music can play in enriching the lives of those around them."

A committee of residents at Collington organizes

on-site music performances and collaborative opportunities for residents, including a community choir, jazz band and Sunday afternoon concerts that feature residents who are musicians. As a reciprocal living-and-learning experience, Samantha and Matthew enhance these existing activities by performing for residents, curating a new concert series and teaching courses on music appreciation and music theory.

Collington Executive Director Marvell Adams says that residents clearly appreciate the new energy and knowledge that Samantha and Matthew bring not only to their music programs, but also to their community as a whole. In fact, the idea for the artist residency came from a Collington resident who graduated from SOM with a degree in clarinet performance.

"Our residents want enriched lives that include

student experiences," Marvell says. "Many of our residents are retired professors and teachers who long to interact with students."

Samantha, a cellist, has toured with orchestras and chamber music ensembles around the United States, Latin America and Europe. She is pursuing her master's degree in cello performance and is dedicated to teaching music. Matthew, a clarinetist, is a freelance musician and teacher in the Baltimore and Washington, D.C., region. Also, an accomplished jazz saxophonist, Matthew has performed with many jazz artists. He is pursuing a doctorate in clarinet performance.

As one of several community engagement programs at both SOM and Collington, the artist residency is an extension of both institutions' commitment to fostering a spirit of inclusion and engagement with diverse communities.



Cross-campus Collaboration Animates Lathrop Communities

Over the past 30 years, Lathrop Communities residents, board members and staff have fostered a collaborative framework to accomplish the goals and the mission of the organization. One such initiative is the land conservation and restoration program that residents have led since 2013. It has yielded impressive results and garnered local, state and national acclaim.

As a committee, residents and staff co-labored to remove more than 5,000 invasive plants and restore wildlife habitats on 50 acres of Lathrop land on its campuses in Easthampton and Northampton, Massachusetts. With grants from local agencies and Kendal Charitable Funds, committee members also restored trails on each campus to make them more accessible.

Because of the Land Conservation Committee's efforts, the National Wildlife Federation has designated the Lathrop Communities in Easthampton as a Certified Wildlife Habitat. The land now supports a wide range of native wildlife, including wild turkeys, bears, bobcats, deer, rabbits, porcupines, pheasants and hawks. In October, the community hosted a "Free Fifty" celebration that included educational and experiential sessions about the land for local naturalists, board members and residents.

"Community is ever-evolving and only possible

through intentional collaboration to transform the experience of living at Lathrop, together," says Thom Wright, Executive Director of the Lathrop Communities. "In 2017, Lathrop reimagined its governance structure to strike the right balance of committees to optimize engagement at every level and to support effective decision-making. Committee work centers on organizational goals and resident interests; the latter being integral, valued and meaningful."

Each campus has its own Residents' Association with different goals and interests and, therefore, different committees, Thom says, but there are also joint committees with representatives from each campus that support joint initiatives. Residents lead the direction of programs and services in ways that broadly consider Lathrop's people and the land.

"Many initiatives are being planned for 2018, and as new residents, board members and staff join Lathrop, they are invited to participate in established committees and to inspire new initiatives and committees," Thom says. "The spirit of community within Lathrop Communities draws inspiration from an indomitable sense of cooperative living for which inhabitants of New England's Pioneer Valley are well-known."

Lathrop Cosponsors 36th Annual Pride Parade



Saturday, May 6, 2017, was the 36th Annual NoHo Pride Event and Parade. As always, Lathrop Communities was a sponsor and provided a strong marching contingent. Twenty Lathrop residents walked the one-mile parade route from downtown Northampton to the 3 County Fairgrounds. To view Lathrop's video of the parade, go to: <https://player.vimeo.com/video/217052119>.



Kendal at Lexington Funds Training to Expand its CNA Staff

Like many Life Plan communities, Kendal at Lexington found that maintaining a full complement of qualified caring staff for its Benjamin Borden Health Center grew more challenging in 2017.

"This was an anomaly for Kendal at Lexington," says Executive Director Mina Tepper. "For several years, we had been very fortunate to be able to attract and retain high-quality, certified nursing assistants, with a waiting list of applicants desiring to join our team."

Standard staff recruiting tools failed to find CNA candidates, so an unconventional way of solving the staffing problem was needed.

"Our existing CNA staff was working extra shifts and many long hours to ensure that residents received quality care," Mina says. "We recognized that we

could not ask them to continue to work at this level. Fortunately, Margaret Hager, our Human Resources Director came to the rescue when she identified an organization in Charlottesville, Virginia, that was willing to conduct a special CNA training program for us."

For a set fee paid by Kendal at Lexington, the organization was prepared to provide training for a class of up to 10 students at a time. The students would receive books, uniforms, classroom and clinical training, and preparation to sit for the state test conducted by the Virginia Board of Nursing that would ultimately result in licensure as a certified nursing assistant. The school even made arrangements for assisting the students to schedule the test.

Since the training would occur at the school's facility in Charlottesville, Kendal at Lexington also opted to provide transportation. The students would meet at Kendal and be driven to and from school by one of Kendal's drivers. In return, the students who received this career growth opportunity would be asked to commit to working for Kendal at Lexington for a period of one year.

Once the program and expenditures were approved, the HR Director and the Director of Nursing partnered to advertise this opportunity and interview and select the 10 best candidates. The selected candidates shared common traits; they recognized the career benefits of the opportunity being provided and had the initiative and desire to work hard and be successful. One of the applicants was a Kendal dining employee.

Before embarking on this educational opportunity, those who were selected were advised about the expectations of the academic program. But more importantly, their orientation also provided an opportunity to share Kendal at Lexington's expectations, including an emphasis on Kendal's Values and Practices.

"As it turned out, there was an unexpected positive outcome, as well," Mina says. "A strong mutual support group was formed among the students as they got to know one another during the drive between Lexington and Charlottesville."

Eight of the students successfully completed the training program, and all eight began work at in the Borden Health Center as nursing assistants pending their passing of the Virginia State Boards, which all have since passed.





Fundraising Extends Reach of Hospice and Palliative Care at Chandler Hall

Chandler Hall's Hospice and Palliative Care programs provide support and care for patients at the end of life and for those dealing with serious illnesses by being respectful of patient choices and where they want to be. Donations totaling more than \$250,000 in 2017 allowed Chandler Hall to extend these services to hundreds of patients who otherwise could not afford them.

"Chandler Hall's Benevolent Care Fund has allowed us to be the hospice of YES," says Patty Bevlock, Senior Director of Hospice and Palliative Care. "We are able to help patients who desire different treatments to keep them comfortable longer. Decisions on care are patient-focused, not cost-focused."

Chandler Hall Hospice served more than 600

patients in 2017. Reimbursement for hospice care is less than \$200 each day and is meant to cover all medications, equipment, transportation, services of nurses, physicians, social workers, chaplains, and nursing assistants, physical and other therapies and volunteers' expenses. However, the costs of care far exceed the reimbursement for care and at least half of Chandler Hall's hospice patients received some assistance in 2017 from the Benevolent Care Fund.

"Last year, we had a young mother of two in our care who wished to die at home. Her goal, even while dying, was to spend as much time with her children as possible. She wanted infusions and treatments that could make that possible,"

Patty says. "This care would be cost-prohibitive with normal reimbursement, but we were able to help her gain weeks of time to be with those she treasured most and to give her children precious memories because the Benevolent Care Fund paid for her infusions and treatments when their cost exceeded insurance reimbursement."

In June 2017, Chandler Hall became a Joint Commission-Certified Community Based Palliative Care Program. People receiving this care are those most likely to fall through the cracks of health care. They may not be sick enough to qualify for hospice care, but they are often fragile enough to benefit from palliative care, which focuses on providing relief from the symptoms, pain and mental stresses of a serious illness.

During 2017, Chandler Hall's Benevolent Care Fund made it possible for 24 palliative care patients to receive more than 541 visits from physicians, social workers, nurses, chaplains and volunteers. None of this care was reimbursable under the present health care system.

Chandler Hall also has organized support groups for family members.

"Our monthly bereavement groups are growing and diversifying. In 2017, we added two evening support groups and two closed, focus support groups. [Focus support groups are facilitated by participants who have been active members for years.] In 2018, we foresee again providing closed group support and adding a loss-of-partner group," Patty says.

"In 2017, we implemented a children's bereavement camp. Heartened by the success of the camp and its value to the campers and their families, we will continue the camp this year. All of these services are free of charge and available to the wider community."



Kendal at Oberlin: Looking Back, Moving Forward

To a casual observer, the clay-surfaced tennis courts located on the far south edge of Kendal at Oberlin's campus, are a venue for recreation and exercise. But to the dozen Kendal residents and staff convened in early 2018 to reflect on Kendal's 25th anniversary, the courts illustrate the caring community where they live and work.

Gretchen Roose, who moved to Kendal when it opened in the fall of 1993, remembers people from the city and Oberlin College helping her husband Ken and other residents build the courts. Later, community residents returned to play tennis. The courts set a "welcoming tone" from the start, CEO Barbara Thomas said. "It showed that Kendal was a community in unity with our larger community," she said.

The clay surface was selected because it's easier on aging joints and can be used by people with various physical limitations.

"We had a resident early on who had Parkinson's and he would go out on those courts and it was like he was a totally different person," said Maggie Stark, Director of Admissions & Marketing. For another resident recently sidelined by a stroke, recovery will

be complete when she is able to play tennis again.

Other examples of how Kendal at Oberlin has collaborated within and with other groups to make a positive impact are abundant. The gathering went around the table listing many of them:

- An Oberlin College student from Lebanon visits resident Ed Schwaegerle to share conversation and offer vision support.
- A handful of tech-savvy residents trouble-shoot other resident technological issues either over the phone or in person.
- For the past 15 years, residents have been matched with first-year students at Oberlin College to participate in "Ars Moriendi: Death and the Art of Dying" to talk about living life to its fullest.
- The Ninde Scholars Program, started by residents Dick and Nan Ninde, and financially supported by dozens of residents, matches Oberlin high school students who are low-income or first-generation college students with college student mentors.
- Every holiday season, Kendal and Oberlin residents join together to sing carols and spread holiday cheer in the downtown shops and college buildings.
- Kendal and Oberlin residents also came together in the mid-1990s to infuse new life into the city's faltering League of Women Voters.

"Today the League of Women Voters of Oberlin Area is the fourth or fifth largest in the state. I see the resurrection of the defunct Oberlin league by a group of Kendal residents and Oberlin citizens as a sterling example of both collaboration and resilience," said resident Elizabeth Aldrich,

managing editor of the monthly *Kendalight*.

The community's 25th anniversary celebration has also served as a touchstone to reflect on how the community has changed, and its resilience in facing those changes.

The Jameson House, a 12-bedroom "small house" concept for men and women with mild to moderate cognitive changes, recently opened. A multiyear, campus-wide renovation of cottages and apartments continues. Yes, living amid remodeling and construction is challenging for both residents and staff.

Technological improvements are ongoing and will increase in all facets of operation—one of five goals outlined in Kendal's 2017-2021 strategic plan. The plan also recognizes that growing older today has changed over the past 25 years. Aging boomers, who were born between 1946 and 1964, have different expectations, interests and needs as they begin to reach retirement age, including working beyond normal retirement age. Plus, many of them want to age in place.

Kendal at Home, first offered in northeast Ohio and now expanding outside of Ohio, provides supportive services for people who want to remain in their home. Some Kendal at Home members are now Kendal at Oberlin residents, and the two organizations have worked together to make that an easy move.

"They both share Quaker values. It was really a seamless transition and a great partnership," said Grover Zinn, who moved to Kendal in 2011 with his wife, Mary, now deceased.

Barbara Thomas, who joined Kendal at Oberlin a year before it opened, said the community will continue to change with the times. "But I have confidence that if we continue to attract the kind of residents we have now, we will be fine," she said.

Kendal at Home Nurtures Homegrown Leaders

When Kendal at Home was launched in northern Ohio 15 years ago, only a handful of companies were focused on providing home-based continuing care for older adults. Lynne Giacobbe was at the helm of this startup, and as she watched this field grow, she realized that she and her team at Kendal needed to grow too, by acquiring leadership skills for the task ahead.

Fast-forward to today, and you can see Kendal at Home's leadership acumen making its mark in an aging services field now about 30-strong. Kendal at Home has:

- Developed a training curriculum, sharing tools and lessons learned with other continuing care at home organizations.
- Expanded its service area into other parts of Ohio and is working on plans to launch continuing care at home services at other Kendal locations.
- Created a memory care program to help support its members living at home.
- Implemented a Falls Prevention Program and was part of a statewide collaboration to prevent falls.

For Kendal at Home's Executive Director, personal and organizational growth go hand in hand. Before getting involved in leadership training programs, Lynne says she felt a bit isolated and struggled to find her way. As her list of leadership credentials grew, so did her confidence to emerge as a leader in an expanding field that had more in common with retirement communities than she realized.

"We are all serving older adults and are focused on person-centered care, we're just doing it in different ways. These leadership programs connected me to people across the country and opened doors I didn't even know I should be knocking on," she says.

Lynne's leadership accomplishments include:

- Alumna of the 2010 LeadingAge Leadership program and the Inaugural Leadership Educator Program in 2015.

- Served on the LeadingAge Leadership Alumni Board of Directors.
- Collaborated on the design committee helping to develop and launch LeadingAge Ohio's Leadership Program, and then served as facilitator for four years.
- Participated in Cleveland's first Harvard Business School program, Strategic Perspectives in Nonprofit Management, in 2017.
- Currently serves as a coach in the national LeadingAge Larry Minnix Leadership Academy.

"The important thing leadership training did for me was it helped me feel that I belonged here and gave me the confidence to carry the organization forward," Lynne says.

Lynne is also a graduate of the Leadership Educator Program, led by consultant Judy Sorum Brown and Wendy Green, Managing Vice President, Leadership Development at LeadingAge. Both women have been mentors to Lynne. "They made me realize how important it is to have a mentor in your life, who can help you discover more about yourself," Lynne says.

Lynne's staff is small, only 12 people. "When you have such a small team it is so critical that each person has an opportunity to contribute. My goal is that everyone here has an opportunity to participate in a leadership program," she says.

Lindsay Scott, Lead Sales Specialist, and Mary Jo Dziak, Director of Clinical Services, have both completed the Kendal Leadership Fellows program, and Karen Graham, Controller, is currently enrolled. Katie Tipton, Care Coordinator, has completed the LeadingAge Ohio Leadership program, and Terri Lanham, Care Coordinator, is currently participating in the Lorain County Leadership program. Mary Jo also plays a major role in Lorain County leadership activities (see sidebar story).

Taking Leadership Beyond Kendal at Home

Mary Jo Dziak joined Kendal in 2015, the same year she completed Leadership Lorain County. The nonprofit's mission is to foster lifelong leaders who serve as catalysts for positive change, which is a good descriptor of Mary Jo, Kendal's Director of Clinical Services.

For four years Mary Jo has spearheaded Strides for Leadership, an annual fun walk and run that raises money for health and wellness programs in Lorain County.

"As part of Leadership Lorain County, you have to pick a project that gives back, and we started Strides for Leadership with the idea of carrying it on," says Mary Jo, an avid runner.

The event has raised more than \$10,000 and grown to about 225 participants. Kendal at Home is one of the sponsors of Strides for Leadership.

Mary Jo says leadership training has helped her develop two important skills—problem-solving and networking, which she uses at Kendal and in her work as a volunteer.

In looking for a worthwhile project for Strides to fund in 2018, Mary Jo saw Facebook postings on a local running group site about a grassroots effort called Blessing Box. Two local runners were

filling boxes with food and personal care items, then placing them in high poverty areas to help those in need.

Because Blessing Box is not a 501c3 charity, Mary Jo and her team needed to both

network and problem-solve so Blessing Box could legally receive money from the race. They worked it out by adding an established charity, Second Harvest Food Bank, to the mix.

Mary Jo is also a graduate of the Kendal Leadership Fellows Program.

"Leadership training has opened my eyes to the bigger picture and the greater good. It's helped me see the challenges other people face," she says.



Intergenerational Programming Study Cites Examples of 2 Kendal Communities



A 2017 report describing the findings from a yearlong study on the nature and extent of intergenerational programming in senior housing includes references to successful programs at both Kendal at Oberlin and Kendal-Crosslands Communities. Generations United and LeadingAge conducted the study—"Intergenerational Programming in Senior Housing: From Promise to Practice"—with support from the Retirement Research Foundation.

"Residents at housing communities with a long-standing, mission-based intergenerational focus are active in planning and participating in intergenerational programming," the report notes. "At

Kendal-Crosslands, ... an Intergenerational Committee comprised of an active group of residents, identify pressing community needs, locate appropriate community partners, and recruit volunteers. At Kendal at Oberlin, a Resident Volunteer Clearinghouse disseminates information about volunteer opportunities to residents."

Participants in the study at Kendal at Oberlin included CEO Barbara Thomas, Early Learning Center Director Jeni Hoover and Michele Tarsitano-Amato, Director of Creative Arts Therapy. The report includes this quote from Barbara: "We customize intergenerational experiences for our students. We want our volunteers to share their talents."

The report also quotes Kendal-Crosslands resident Betty Warner, who notes that residents of senior living communities often become isolated from their neighbors. "We want to broaden the horizons of residents and keep them in touch with the outside world," Betty says.

On Oct. 30 at its annual meeting in New Orleans, LeadingAge awarded Kendal-Crosslands Communities its 2017 Hobart Jackson Diversity and Inclusion Award for the community's five-year collaboration with educators and advocates to create the Chester Charter School for the Arts in Chester, Pennsylvania, one of the poorest cities in the nation.

The research report highlights challenges



and effective strategies for overcoming barriers to intergenerational programming and identifies technical assistance needs. It also includes four "Spotlights" that focus on different ways providers can integrate multigenerational activities into senior housing.

The study's key findings include the following:

- Many housing providers have integrated a range of intergenerational activities into their overall programming and see positive benefits for residents and youth.
- Most intergenerational efforts identified are short-term or one-time events and do not require a major commitment of time.
- Most providers have not identified clear outcomes for older adults or youth, nor have they conducted formal program evaluations.
- There is limited training of staff and volunteers.

Beryl Goldman, who retired in 2016 as Director of Kendal Outreach, served on an advisory panel to help guide the research study.

System Finances

THE KENDAL CORPORATION devoted 2017 to helping affiliates execute on planned capital transactions totaling over \$270 million, supporting Kendal Affiliates through leadership transitions, and building a framework for systemwide strategic planning. With our partners, we continued to make progress on developing a unique Zen-inspired senior living community in Northern California. In 2017, in accordance with its longer-range plan, Kendal reduced its unfunded pension obligation by nearly 9% (\$1.8 million) and oversaw the plan assets' growth of 15% (about \$11 million). In 2017 Kendal's plan provided reliable income to more than 400 active Kendal retirees. There are over 1,000 future retirees in the plan who will benefit from Kendal's ongoing commitment to honoring the promises made to those who have served at Kendal, while at the same time, remaining responsive to the evolving demands of today's labor markets. The Kendal Corporation Group Health Plan concluded its fourth year of service in 2017, providing essential coverage to participating Kendal Affiliates' employees and families. Conceived at a time when there was a great deal of uncertainty about the availability and cost of health insurance, the Plan has sought to reduce cash flow volatility, remove uncertainty from the annual renewal process and enhance the health and wellness benefits participating affiliates are able to provide to their employees. The Plan complements the robust employee benefit programs many Kendal Affiliates offer, including participation incentives for wellness initiatives aimed at managing chronic conditions, identifying emergent health risks, and improving quality of life for participants. The Plan provided coverage for over 1,340 members during the year, with a 20% improvement in the loss ratio over the prior year, increasing plan reserves by just over \$2,100,000. Although permitted by the Plan Documents, the Plan has not had an additional capital call or adjusted the stable premiums paid by participants during a plan year since inception.

—Amy Harrison, CFO

THE ADMIRAL AT THE LAKE has been working toward positioning itself to refinance its outstanding bonds. The community has remained resilient since opening in its new high-rise building in July 2012 and ultimately that paid off. Last year was capped off by a successful refinancing, or advance refunding, in December of its Series 2010 bonds. The original Series 2010 bonds were issued in the amount of \$202,350,000, with interest rates ranging from 7.25% to 8.00%. The new Series 2017 bonds were issued in the amount of \$150,940,000 with an average rate of 5.41%. The Admiral will benefit from debt service savings in the first two years of over \$3 million per year, while the following years will see a debt service savings of about \$1.2 million per year. Overall, the net present value savings is approximately \$17.5 million, or 13.6% of the debt service on the Series 2010 Bonds. The collaboration among The Admiral, many of its residents, Kendal Corporation staff, the underwriter, Ziegler and many attorneys and consultants made this transaction a success. The federal tax legislation proposed in early November included the elimination of advance refunding of tax-favored bonds, so The Admiral had to act fast to accomplish the refinancing by the end of the year. Due to the dedication and perseverance of the Admiral's team, The Admiral was able to achieve in 45 days what normally takes at least 90 to 120 days to complete. During 2017, The Admiral achieved a net operating margin of approximately 17%, putting the community in the 80th percentile of all CARF accredited communities. The Admiral at the Lake Foundation provided over \$330,000 of support to residents in need during 2017.

—Daniel Churchill, CFO

BARCLAY FRIENDS experienced a devastating fire in November 2017, causing the entire campus to be closed for several months. The Woolman building, which housed residential living, personal care and the Tapestry Memory Support program, had to be demolished. The skilled nursing building, Cotter, was largely undamaged, and the Barclay Friends team was able to welcome returning and new residents starting in April 2018. Barclay Friends remains humbled by the outpouring of gifts totaling \$363,000 as well as other assistance that was received to help support

the recovery. About 80% of the generous monetary contributions came directly from Kendal Boards, staff, residents and our partners across the Kendal system. With close ties to the community going back to 1893 when it was founded as The Barclay, Barclay Friends is committed to serving residents and its community as it seeks to recover, and help others recover, from the loss.

—Jennie Bury, Director of Finance

CHANDLER HALL closed on a new \$25 million tax-exempt bond issue in July 2017. Proceeds from the Series 2017 bonds were used to refund the outstanding bonds, establish certain reserve funds and create a capital expenditure project fund. \$2.6 million was invested in the campus infrastructure, including new roofs and paving, and mechanical systems, such as boilers and generators, and to modernize resident care areas as well as improve the independent and personal care residences. These improvements have enhanced the physical appearance and timeless appeal of the Chandler Hall campus. Despite incurring over \$800,000 refinancing and other restructuring costs, Chandler Hall improved its bottom line in 2017. Overall resident revenue increased by 5% due to improvements in skilled nursing and personal care. Operational efficiencies were also achieved through controlled overtime, and outsourced security services. More thorough financial screening prior to admission has contributed to a reduction in uncollectable accounts from residents. A new pricing program for personal care was also established in 2017 that enables the cost of care to reflect the level of independence of each resident. Residents are charged a base rate for their accommodations, and then for the care and management of medicines based on individual assessments. The new pricing structure allows Chandler Hall to appropriately bill for services provided, while appealing to a broader market segment.

—Michael McGlone, Senior Director of Finance

COLLINGTON continued to be successful in improving occupancy, ending 2017 with 309, or 95%, of independent living residences occupied. Collington remained focused on financial stability,

ending the year with a debt service coverage ratio of 2.23x, a net operating margin of 8.0% and 284 days cash on hand and in full compliance with its debt covenants. Collington achieved excellent results through keen attention to operational excellence. On May 1, 2017, Collington closed a \$63,995,000 series 2017 tax-exempt bond refinancing through Prince George's County, Maryland. This refinancing allows Collington to further leverage its recent growth and increase its financial flexibility, benefiting current and future residents. Collington wrapped up an 18-month strategic planning process near the end of the year, solidifying the deliberate strategic focus of the community over the next five years. The key initiatives of the strategic plan are Health and Wellness, Stakeholder Engagement, Stewardship of Resources and Partnerships. The Collington Foundation funded 39 employee scholarships totaling \$47,825, provided over \$146,000 to support residents with financial need and hosted \$3,100 of donor-funded musical events. In 2017, the Collington Foundation received just over \$485,000 in donations. —Justin Reaves, CFO

KENDAL-CROSSLANDS COMMUNITIES had another year of strong positive results, with an excess of revenues over expenses of approximately \$6.7 million, driven by net income from operations of \$2.9 million and realized gains of approximately \$3.8 million for 2017. Net assets increased to approximately \$72 million in the same period. KCC has maintained a strong cash and investment position relative to debt obligations, with \$90.6 million in unrestricted cash and investments, compared to just under \$48.1 million in long-term obligations, and more than 760 days cash on hand at year's end. Kendal-Crosslands Communities enjoyed overall occupancy of approximately 89%, across a diverse array of living options in 2017. —Edward Plasha, Director of Finance

KENDAL AT GRANVILLE continued to focus its efforts on increasing move-ins and occupancy during 2017. The community collaborated with The Kendal Corporation to craft a new marketing plan, including many initiatives aimed at increasing independent living occupancy. As a result, the community

implemented new contract types, more competitive pricing, and flexible options for residency. We are optimistic these strategies will increase occupancy and drive revenue over the next several years. During 2017, net assets decreased by \$352,540. While not the desired outcome, it is a 48% improvement over 2016. Revenue increased 3.7% while expenses increased by 1.2% over the prior year. —Jennifer Bobak, Finance Manager

KENDAL AT HANOVER ended 2017 in the strongest financial position since opening in 1991. The community had revenues over expenses of \$2,143,596, realized gains on sale of investments of \$2,389,829, unrealized gains on investments of \$1,913,976, for an overall increase in unrestricted net assets for the year of \$6,654,041. The average independent living occupancy during the year was 97%, while the average census in the Health Center was 91%. The community turned over 17 independent living apartments, resulting in net entrance fees of \$7,125,000. As of the end of the year, days cash on hand, debt service coverage and net operating margin were 808 days, 2.99X, and 1.52, respectively. This was the second consecutive year that the community ended the year with positive operating results. In keeping with the Master Plan, Kendal at Hanover will begin renovation and expansion of the Health Center in 2018, funded by \$5,000,000 from reserves, and additional debt of about \$26 million. The project will increase the Health Center's assisted living level 1 from 43 to 51, and assisted living level 2 from 39 to 45. Overall assisted living will increase from 82 to 96, an increase of 14 accommodations. The Health Center's skilled nursing capacity will remain unchanged at 5. The expansion footprint is expected to be approximately 13,000 square feet, while about 80,880 square feet of the existing Health Center will be renovated. Construction is expected to begin in June 2018 and be completed by May 2021. Fitch Rating also reaffirmed Kendal at Hanover's investment grade rating of BBB+ with a "stable" outlook in 2017. —Brent Edgerton, Associate Executive Director/CFO

KENDAL AT HOME added 42 new members in 2017. Just under a third of those new members

joined in the central and southern Ohio divisions. Revenue grew 13% in 2017, and the Kendal at Home community now connects members living in 169 different cities. Care Coordination remains the core program, helping members remain resilient and live their best lives by coordinating both care needs and wellness initiatives. The Kendal at Home Care Coordination team obtained CLIPP (Certified Living in Place Professional) certification this past year through collaboration with the Universal Design Living Laboratory located in Columbus, Ohio. The team also hosted quarterly Healthy Living Healthy Aging seminars, bringing members together to learn, share and navigate the aging process together. Kendal at Home's Supportive Services Division grew internally, providing as much as 40% of member care needs throughout 2017. A dementia specialist provided specialized training for all caregivers to help better serve members with cognitive impairments. Kendal at Home added key positions and continued to align operations among the divisions to improve service capacity and better position the organization for growth. These efforts resulted in a 12% reduction in operating expenses from budget for the year, and an improvement in results from operations of 23% over the prior year. Cash & investments grew by 19% over 2016, ending at just under \$4.9 million, excluding restricted funds. The management team participates in both local and national leadership programs, sharing knowledge and strengthening collaboration with other continuing care at home programs. —Karen Graham, Controller

KENDAL AT ITHACA enjoyed a very successful year in 2017, as the benefits of its \$39 million repositioning project, which was completed in April, began to be realized. The new building with 24 independent living apartments is fully occupied, and the number of new residents in cottages exceeded projections. Independent living occupancy grew to 85% by year end, with the total number of residences occupied Dec. 31 at the highest level in eight years. Health Center census was high, with the newly constructed and expanded skilled nursing area averaging 93% occupancy. Growth from both independent living

and the Health Center helped drive a \$2.6 million increase, or a 13% improvement, in total revenue over the previous year. With the organization's continued focus on operational excellence, there was improvement during 2017 in a number of Kendal at Ithaca's key financial indicators. In particular, the net operating margin was 0.86%, the first positive net operating margin for the community since opening and a 200% improvement over 2016 results. Net entrance fees were just over \$9.4 million, helping days cash on hand increase to 682 days. The debt service coverage ratio now stands at a solid 3.5X. In 2017, Standard & Poor's Global Ratings affirmed Kendal at Ithaca's investment grade credit rating of 'BBB' with a stable outlook. —*Gregory Sommers, CFO*

KENDAL AT LEXINGTON experienced strong fiscal performance during 2017, fueled by high occupancy in all levels of care and diligent expense management. The community posted an operating gain of \$2.5 million, yielding a net operating margin of 12.8%. Total net assets increased by \$4.2 million. The community continues to experience high residential occupancy with yearend occupancy at 98% and entry fee receipts totaling over \$4.7 million. At Dec. 31, day's cash on hand and debt service coverage was 570 days and 3.64X, respectively. Assisted living and skilled nursing occupancy averaged 91% and 95%, respectively. Fitch reaffirmed the community's BBB- investment grade rating, which was particularly welcome when Kendal at Lexington borrowed \$20,380,000 via fixed rate bonds and \$13 million in variable, short-term, bank-qualified debt in December of 2017 to finance its Phase III renovation and expansion project. The community is hard at work and extremely excited about the renovation and expansion of the campus. After significant zoning challenges, construction began and will continue for about two years. During Phase III, 30 new residential cottages, of which 26 are already reserved, will be constructed on a ridge overlooking the campus. The main dining venue will also be renovated and expanded to accommodate additional residents who will live in the new cottages. Phase III will include extensive renovations to the

Webster Assisted Living Center and the Benjamin Borden Health Center. A maintenance building and an emergency access road into the community are also part of the project. In addition to Campaign 2020 contributions of \$438,000 in 2017 to support the renovations of the Health Centers, Kendal at Lexington received a very generous unrestricted gift of \$514,000 from the estate of a former resident. The board designated this contribution for the Fellowship Fund and Campaign 2020. By yearend 2017, the total capital campaign contributions and pledges were approximately \$1.4 million. —*Felicia Bush, Chief Financial Officer*

KENDAL AT OBERLIN had a busy year in 2017, with the implementation of a newly approved Strategic Plan, followed by a realignment of Board committees tied to specific strategic goals of the community. There was significant planning for Kendal at Oberlin's upcoming 25th Anniversary, with a special focus on growing the Residents Assistance Fund to ensure that current and future needs will continue to be met. The year ended with the opening of Jameson House, a small house that offers memory support services for residents living with mild to moderate cognitive changes. The strong financial and operational results of 2017 provide Kendal at Oberlin with the foundation to support its commitment to those we serve and those who serve. There were several key areas of focus and accomplishment in 2017.

- CARF reaccreditation was awarded through 2022, with a significant number of strengths cited, including three exemplary areas recognizing unique contributions and practices of staff and residents, along with outstanding financial ratios that included the operating ratio, days cash on hand and cash to debt ratio.
- Operational Excellence—Standard & Poor's affirmed Kendal at Oberlin's A- Rating and revised the outlook from Stable to a Positive due to solid liquidity and consistently high occupancy, driven by a strong management team with the support of The Kendal Corporation.
- Preparing for the launch of the 25th Anniversary Residents Assistance Fund Initiative—In 2017,

Kendal at Oberlin began preparations for a significant initiative focused on growing the Residents Assistance Fund by over \$3.5 million through outright gifts, named endowment funds, bequests and planned giving instruments. During 2017, Kendal received its largest estate gift ever, \$1.3 million, along with many other community-wide gifts, that have contributed to a very successful fundraising initiative.

- The community continues to focus on investing in staff through participation in comprehensive leadership programs in collaboration with the Kendal System, LeadingAge national and LeadingAge Ohio's Leadership Academy Programs.
- Kendal at Oberlin's investment in the Ziegler/LinkAge Venture Funds I & II provide access to innovations that are focused in the Senior Living Sector. It provides a venue that broadens exposure to innovative technology that will enable the community to be both high-touch and high-tech.

The areas specified above contributed to Kendal at Oberlin's ability to:

- Grow total assets on the balance sheet by over \$11.8 million.
- Increase total net assets by approximately \$8.8 million through income from operations of \$2.4 million and nonoperating results of \$6.3 million.
- Reconfigure certain operating areas to maintain a five-star rating by CMS in the Stephens Care Center.
- Maintain a five-star (highest level) rating for its Early Learning Center from the Ohio Department of Jobs & Family Services—Ohio's Quality Award System.

Kendal at Oberlin continues to focus on enhancing the resident experience through ongoing planning, listening to resident feedback and developing programs and services that are creative and resident-centered. —*Ann O'Malley, CFO*

KENDAL ON HUDSON's first full year of operations since the completion of Project Renew was 2017. The benefits of that project have manifested in several

areas, including: the achievement of marketing targets for both assisted living and skilled nursing; a reduction in average cost of health care per resident due to the shift to a more cost-efficient and appropriate model of care. In the independent living, marketing results were positive, with 25 move-ins, resulting in net entry fees for the year of \$10.6 million. Overall, key metrics such as days cash on hand, cash to debt, operating margin and net operating margin improved. The debt service coverage ratio at the end of the year was strong at 2.13X and the actuarially funded status is resilient at 105.1%. The past three years have shown steady progress with move-ins as compared to the previous three years. The Board approved a renovation project for the Bistro to create a modern, “casual dining” venue consistent with emerging market demand. The experienced management team was able to reduce controllable expenses by 5%, compared to budget, and holding those same costs to a 1.5% increase over previous year. Kendal on Hudson is well-positioned to continue to strengthen operating results and explore new contract options to appeal to the next generation of consumers in 2018. Resident satisfaction remains strong at more than 90%, and a disciplined, experienced management team is in place. —*Jean Eccleston, CFO*

LATHROP COMMUNITIES enjoyed another year of increasing occupancy. As of Dec. 31, occupancy was 90% across all residential units and was 94% in the townhomes. Cash and investments decreased from 239 days to 138 days due to increased investment in refurbishing residences to support marketing and campus master planning. Building on the momentum of increased occupancy and improved operational performance, master planning continued throughout 2017 to ensure that Lathrop will thrive by maintaining and enhancing its position in the market and refreshing the campus with new accommodations over the next three years. Former and current residents continued their generous culture of philanthropy in 2017, with just over \$80,000 in gifts to the community. —*Frank Sansom, Director of Finance*

Joe Savery retires as Vice President, IT



One of Kendal's longtime stalwarts has retired. After more than 41 years of service to the Kendal System, Joseph Savery retired June 29, 2018, as Vice President, Information Technology. Joe—whose mother, Joanna B. Savery, was one of Kendal's founding directors—brought curiosity, determination,

a healthy sense of humor and a wide range of talents to his career at Kendal.

Joe held a master's degree in Social Service from Bryn Mawr Graduate School of Social Work and Social Research in Bryn Mawr, Pennsylvania, and a bachelor's degree in Human Relations from Earlham College, Richmond, Indiana.

He joined Kendal at Longwood in April 1977 as a Social Service Associate. In April 1979, he became the Social Service Director for Crosslands. While there, Joe also served as temporary Administrator for Linden Hall in 1980.

Joe became Manager for Information Services for The Kendal Corporation in 1987 and was made Director in 1998. Since 1987, Joe has brought computerization at Kendal from a few disconnected PCs at a single site to an interconnected network involving 13 locations in eight states and staff from every department, as well as residents.

Joe also served as the Director for Information Technology for COLLAGE—the forerunner of Vitalize 360—a nationwide consortium of more than 50 aging services communities using a suite of computerized and scientifically grounded health and wellness assessment tools to measure, track and better manage the health and wellness of independent living residents.

Over the past couple of years, Joe worked tirelessly to create KendalNet, a secure, user-friendly intranet platform to speed and enhance communications, document sharing and collaboration across the Kendal System. It will serve as a lasting tribute to the multifarious talents of Joe Savery.

Health Services Vice President Peggy Sinnott retires



Peggy Sinnott retired as Kendal's Health Services Vice President April 1, 2018. In that role, Peggy facilitated and coordinated all health services staff for Kendal's 13 affiliates in eight states. Her responsibilities included policy and procedure development, program development, staffing analysis, model practice integration into Kendal practices, risk management and corporate compliance programming.

Another of Peggy's major responsibilities entailed the assessment, evaluation, education and implementation of Kendal's comprehensive Electronic Health Record (EHR). When she came to Kendal in 2006 as Director for Health Services, the health information of residents consisted of countless pieces of paper organized in three-ring binders. With Peggy's guidance, though, Kendal soon took the lead among long-term care organizations nationwide in computerizing its residents' medical records.

Beginning in 2008, Peggy spearheaded the training of health services staff on how to transfer the information into electronic medical records. Within two years, nearly 1,600 staff across the Kendal System—including all nurses, therapists and certified nursing assistants (CNAs)—had been trained as registered users of the new EHR system. While manually converting the medical records into electronic form was a sizable undertaking, it also proved to be an effective way for staff to learn how to use the software.

“There were more pros than cons to entering the clinical data for each resident by hand because the staff learned the system very quickly that way,” Peggy said. “After you enter data for about two residents, you’re really zipping along.”

Peggy received her bachelor's degree in nursing from Gwynedd Mercy College and her master's degree in nursing and business administration from Columbia University. Before coming to Kendal, she served as Vice President of Nursing at Riddle Memorial Hospital.



Kendal COO Judy Braun Retires

Judy Braun, The Kendal Corporation's Chief Operating Officer, retired July 6, 2018, after 17 years of service with the organization. Since joining Kendal in 2001, Judy has worked in close collaboration with Executive Directors, Affiliate Boards of Directors and staff throughout the Kendal System, serving as coach and supporter for the Kendal Affiliates and coordinator of corporate staff's services to the 13 affiliate organizations in eight states.

"With grace, wisdom and a contagious passion for our work, Judy has led Kendal's Affiliate Services team to the great benefit of the Kendal System and the people it touches," Kendal President and CEO Sean Kelly said. "The feedback from dozens of meetings and discussions held all over the Kendal System has convinced us that besides recruiting a new Chief Operating Officer we'll need to add someone in a newly created role of Chief Strategy Officer to take over all of Judy's responsibilities."

During Judy's tenure, the Kendal System added eight new affiliates in seven states, and Judy orchestrated the teams from throughout the System that helped to successfully open each one. She co-chaired the Kendal System response to Hurricane Katrina in New Orleans, sending teams of staff to assist Lambeth House, a life plan community that experienced significant damage and challenges. She also oversaw the system-wide transition to electronic medical records, assisted Kendal Affiliate Boards with the search and onboarding of 13 Executive Directors, and the development of KendalNet, the Kendal System's intranet.

Most recently, Judy has helped provide operational plans for Enso Village, a new type of Kendal community in northern California being developed in partnership with San Francisco Zen Center.

"Kendal is an awesome organization, deeply committed to its values. It has been an honor and a delight to serve the residents, staff and board members," Judy said. "From my new place of retired relaxation, I will be excited to watch Kendal's growth and advancement as it continues to seek better ways to transform the experience of aging."

Judy's colleagues commented that they will miss her laugh, can-do approach, and listening ear, as well as her incredible work ethic and amazing productivity. She has inspired, encouraged and cheered them on as the team in the corporate office accomplished great things during her tenure with the organization.



Judy Braun with Kendal Leadership Fellows consultant, Judy Sorum-Brown.



Judy Braun talks to Kendal's Leadership Fellows about "the light within."

The Kendal Corporation Condensed Financial Information

beginning 1/1/17 and ending 12/31/17

BALANCE SHEET

| | |
|---|---------------------|
| Assets | |
| Cash and Investments | \$3,214,935 |
| Receivable from Affiliates and Intercompany | 4,451,657 |
| Other Assets | <u>20,701,866</u> |
| Total Assets | <u>\$28,368,458</u> |
| Total Liabilities | 30,739,129 |
| Unrestricted | (4,026,996) |
| Temporarily Restricted | 1,649,475 |
| Permanently Restricted | <u>6,850</u> |
| Total Net Assets | (2,370,671) |
| Total Liabilities and Net Assets | <u>\$28,368,458</u> |

Statement of Operations

| | |
|--|--------------------|
| Operating Revenue | |
| System Fees from Affiliates | 7,980,525 |
| Development Fees | 904,047 |
| Outreach programs | 142,180 |
| Investment and Other Income | 465,729 |
| Total Operating Revenue | 9,492,481 |
| Expenses | 10,319,957 |
| Operating Gain (Loss) | (827,476) |
| Non Operating Revenue | |
| Reserve Fee from Affiliates | 283,736 |
| Realized Gains (Losses) on Investments | 117,403 |
| Change in Defined Benefit Pension Plan | 1,831,784 |
| Unrealized Gains (Losses) on Investments | <u>937,795</u> |
| Increase (Decrease) in Unrestricted Net Assets | <u>\$2,343,242</u> |

Kendal Operating Affiliates Selected Financial Information

| Fiscal year ending | The Admiral at the Lake 12/31/2017 DRAFT | Barclay Friends 12/31/2017 | Chandler Hall 12/31/2017 DRAFT | Collington 12/31/2017 | Kendal-Crosslands 12/31/2017 |
|---|---|-------------------------------|--------------------------------------|--------------------------|---------------------------------|
| BALANCE SHEET SUMMARY | | | | | |
| Total Assets | <u>\$168,200,751</u> | <u>\$27,652,185</u> | <u>\$29,609,190</u> | <u>\$89,579,728</u> | <u>\$214,185,998</u> |
| Total Liabilities | 303,651,677 | 8,956,794 | 30,346,056 | 122,415,164 | 142,130,229 |
| Net Assets | | | | | |
| Unrestricted | (144,803,127) | 16,659,306 | (1,157,757) | (36,037,309) | 54,153,573 |
| Temporarily Restricted | 0 | 617,999 | 155,706 | 3,201,873 | 17,303,263 |
| Permanently Restricted | <u>9,352,201</u> | <u>1,418,086</u> | <u>265,185</u> | <u>0</u> | <u>598,933</u> |
| Total Net Assets | <u>(135,450,926)</u> | <u>18,695,391</u> | <u>(736,866)</u> | <u>(32,835,436)</u> | <u>72,055,769</u> |
| Total Liabilities and Net Assets | <u>\$168,200,751</u> | <u>\$27,652,185</u> | <u>\$29,609,190</u> | <u>\$89,579,728</u> | <u>\$214,185,998</u> |
| OPERATING SUMMARY | | | | | |
| Total Income | 20,982,295 | 15,170,000 | 18,597,398 | 27,509,355 | 54,909,119 |
| Total Expense | <u>30,742,774</u> | <u>13,862,378</u> | <u>20,665,005</u> | <u>27,825,229</u> | <u>52,065,671</u> |
| Gain(Loss) from Operations | (9,760,479) | 1,307,622 | (2,067,607) | (315,874) | 2,843,448 |
| Realized Gain (Loss) on Sale of Investments | (376,638) | 0 | 462,769 | 490,959 | 3,819,183 |
| Unrealized Gain (Loss) on Investments | (9,274) | 1,074,796 | 137,624 | 619,206 | 3,149,690 |
| Change in Value of Interest Rate Swap/Cap | 0 | 0 | 0 | 0 | (59,490) |
| Change in Obligation to Provide Future Services | 0 | 0 | 0 | 0 | 0 |
| Unrestricted Contributions | 642,028 | 103,285 | 268,966 | 79,882 | 65,902 |
| Assets Released from Restriction for Capital | 0 | 86,497 | 0 | 0 | 0 |
| Gain (Loss) on Property, Plant and Equipment | 0 | (849,505) | 0 | 0 | 0 |
| Loss from early retirement of debt | (20,754,430) | 0 | (325,079) | (1,986,523) | 0 |
| Other | <u>0</u> | <u>0</u> | <u>14,259</u> | <u>2,726,968</u> | <u>7,717</u> |
| Incr(Decr) in Unrestricted Net Assets | <u>\$(30,258,793)</u> | <u>\$1,722,695</u> | <u>\$(1,509,068)</u> | <u>\$1,614,618</u> | <u>\$9,826,450</u> |

| Kendal at Granville 12/31/2017 | Kendal at Hanover 12/31/2017 | Kendal at Home 12/31/2017 | Kendal at Ithaca 12/31/2017 | Lathrop 12/31/2017 | Kendal at Lexington 12/31/2017 | Kendal at Oberlin 12/31/2017 | Kendal on Hudson 12/31/2017 |
|-----------------------------------|---------------------------------|------------------------------|--------------------------------|-----------------------|-----------------------------------|---------------------------------|--------------------------------|
| <u>\$57,641,087</u> | <u>\$155,425,049</u> | <u>\$5,611,696</u> | <u>\$109,151,923</u> | <u>\$22,905,581</u> | <u>\$90,735,019</u> | <u>\$109,430,193</u> | <u>\$179,677,790</u> |
| 68,826,913 | 110,754,807 | 10,297,565 | 101,083,383 | 43,825,344 | 84,473,133 | 74,433,423 | 192,824,082 |
| (11,585,611) | 35,837,984 | (4,704,832) | 6,282,119 | (21,408,235) | 3,688,984 | 30,076,065 | (13,974,544) |
| 399,785 | 7,354,361 | 18,963 | 1,786,421 | 316,472 | 2,288,548 | 4,645,655 | 828,252 |
| 0 | <u>1,477,897</u> | 0 | 0 | <u>172,000</u> | <u>284,354</u> | <u>275,050</u> | 0 |
| <u>(11,185,826)</u> | <u>44,670,242</u> | <u>(4,685,869)</u> | <u>8,068,540</u> | <u>(20,919,763)</u> | <u>6,261,886</u> | <u>34,996,770</u> | <u>(13,146,292)</u> |
| <u>\$57,641,087</u> | <u>\$155,425,049</u> | <u>\$5,611,696</u> | <u>\$109,151,923</u> | <u>\$22,905,581</u> | <u>\$90,735,019</u> | <u>\$109,430,193</u> | <u>\$179,677,790</u> |
| 14,251,126 | 27,590,448 | 3,585,369 | 23,020,329 | 4,913,944 | 16,198,213 | 19,539,156 | 28,343,705 |
| <u>14,816,763</u> | <u>25,446,852</u> | <u>4,453,195</u> | <u>22,501,639</u> | <u>6,270,666</u> | <u>14,209,585</u> | <u>17,946,548</u> | <u>28,478,861</u> |
| (565,637) | 2,143,596 | (867,826) | 518,690 | (1,356,722) | 1,988,628 | 1,592,608 | (135,156) |
| 0 | 2,389,829 | 134,343 | 143,373 | 0 | (946) | 904,937 | 493,823 |
| 94,537 | 1,913,976 | 285,978 | 211,588 | 63,126 | 1,076,812 | 4,262,652 | 286,795 |
| 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 101,441 | 219,273 | 0 | 7,270 | 70,637 | 514,413 | 28,178 | 0 |
| 0 | 0 | 0 | 8,898 | 9,118 | 0 | 0 | 0 |
| 0 | (12,633) | 0 | (207,353) | (27,334) | (1,146) | 0 | 0 |
| 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| <u>53,160</u> | <u>0</u> | <u>0</u> | <u>0</u> | <u>0</u> | <u>0</u> | <u>0</u> | <u>0</u> |
| <u>\$(316,499)</u> | <u>\$6,654,041</u> | <u>\$(447,505)</u> | <u>\$682,466</u> | <u>\$(1,241,175)</u> | <u>\$3,577,761</u> | <u>\$6,788,375</u> | <u>\$645,462</u> |



**\$1,043,727 in Subsidized
Health Services provided to
Medicaid recipients
by Kendal communities.**

**\$354,976 in Community Building
Activities, including support of
educational programs for local
students and schools and
payments in lieu of taxes.**

Community Benefit

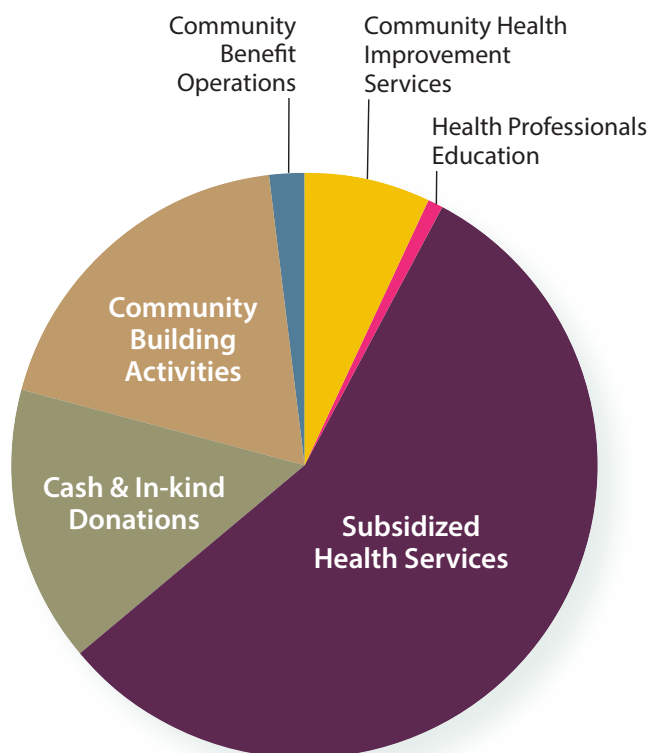
“Just as we encourage our community members, boards and staff to be involved in the larger community as individuals, we believe that each Kendal Affiliate must be a responsible member of the larger community. To this end we strive to be good neighbors, use responsible business practices, be good stewards of the environment, maintain ethical relationships and build good relations within the local community. It is our practice to make fair and reasonable payments to local governments in order not to add significant burden to municipal services. We keep our immediate neighbors and local authorities informed of plans for development. Whenever possible, we share our resources, knowledge and facilities with the larger community. Staff members are encouraged to share their skills with local groups through speaking engagements, workshops and other educational programs.”

—Kendal Values and Practices, page 18

Kendal System 2017 Community Benefit Statistics

Community benefit is defined as an activity that is made possible by the direct commitment and financial participation of a not-for-profit organization.

| COMMUNITY BENEFIT CATEGORIES NET BENEFIT | Expenditures | Persons Served |
|--|--------------------|----------------|
| Community Health Improvement Services | \$ 131,521 | 2,330 |
| Health Professionals Education | 13,903 | 162 |
| Subsidized Health Services | 1,043,727 | 110 |
| Cash & In-kind Donations | 279,689 | 23,417 |
| Community Building Activities | 354,976 | 234 |
| Community Benefit Operations | 30,913 | — |
| TOTAL | \$1,854,729 | 26,253 |



Taking Responsibility in the Larger Community

Kendal communities, board members and staff are committed to taking responsibility in their larger communities, maintaining extensive and mutually supportive relationships and sharing resources and experience. Each year, Kendal community members donate thousands of hours of service as volunteers in their larger communities. For example, Kendal at Oberlin residents, staff and board members contributed more than 62,416 hours of volunteer service in 2017 at more than 80 nonprofit agencies, valued at \$1,456,165, according to research by Independent Sector. Such volunteer activities are classified as community service—not community benefit activities within the technical IRS definition.

What is a Community Benefit?

Community benefit is defined as an activity that

is made possible by the direct commitment and financial participation of a not-for-profit organization. According to LeadingAge, "Community benefit activities are community outreach services that demonstrate an organization's charitable mission." Community benefit programs or activities respond to identified community needs and meet at least one of these objectives:

- Enhance the health of the community.
- Relieve or reduce the burden of government or other community efforts.
- Improve access to health care services.
- Advance medical or health care knowledge.

Kendal began tracking community benefit activities throughout the System using Community Benefit Inventory for Social Accountability (CBISA) software in 2010. The pie chart on this page shows the value of community benefit activities reported throughout the Kendal System in six major categories.

WE ARE INSPIRED BY the deeply held belief and confirming observations that the later stages of life can bring new opportunities for growth and development even if emerging challenges may bring some loss of independence.

WE ENVISION THE FULL IMPACT OF OUR WORK AS the transformation of our culture’s view of aging, of older persons, and of the potential for fulfillment and continuing contribution during the later stages of life.

WE CONTRIBUTE BY working with older people, and others in the broader community, to create conditions that foster independence, well-being, security and fulfillment in later years.

WE WILL BE SUCCESSFUL WHEN all people in our society approach the later years with an understanding of the aging process, with an appreciation of the potential for continued growth and development, and with realistic plans to address the variety of circumstances that may arise during the later period of life.

—Kendal *Values and Practices*,
page 2

A Culture of Generosity

The Kendal System has always been values-based. Our commitment is “to foster a culture of generosity, encouraging and developing full use of time, talent and resources.” Giving is, at heart, a matter of values. It reflects the intersection of your personal values and those of the Kendal community and beyond our walls, whom you may choose to support with a gift.

Kendal Giving

Gifts to Kendal Affiliates and Kendal Charitable Funds during this reporting year came from:*

| AFFILIATES’ FUNDS | FY 2017 |
|---|---------------------|
| Resident Assistance | \$29,253,127 |
| Employee Assistance | \$3,970,063 |
| To benefit Kendal Community | \$20,595,086 |
| To Benefit Wider Community | \$219,483 |
| Expectancies from CGA’s, Unitrusts & Bequests | <u>\$13,069,309</u> |
| TOTAL | \$67,107,068 |

| KENDAL CHARITABLE FUNDS | |
|-------------------------------------|---------------------------|
| For Kendal Charitable Funds benefit | \$3,154,232 |
| Expectancies for Affiliate Benefit | \$1,217,563 |
| Total | <u>\$4,371,795</u> |
| GRAND TOTAL | \$71,478,863 |

| | |
|----------------------------------|--------------|
| Board Members | 131 |
| Residents/Members | 1,660 |
| Corporations/Organizations | 363 |
| Family Members and Friends | 1,871 |
| Employees | 217 |
| Foundations and Trusts | 38 |
| Friends of Kendal | 70 |
| Resident Associations/Committees | 26 |
| Estate Gifts | <u>18</u> |
| Total | 4,376 |

* Does not include statistics from Collington, Kendal on Hudson and Lathrop Communities.

Kendal Giving

Generous contributions in support of Kendal Charitable Funds and Kendal Affiliate funds and programs:

THE ADMIRAL AT THE LAKE

Resident Assistance Fund
Employee Assistance Educational Program
Employee Holiday Fund
Admiral Residents Association
Unrestricted Fund

BARCLAY FRIENDS

Caring Fund for Resident Assistance
Horticultural Therapy Fund
Spirit of Vitality Capital Campaign
J. Carol Hanson Tribute Fund
Employee Holiday Fund
Capital and Restricted

CHANDLER HALL

Adult Day Contributions
Annual Board Giving
Annual Employee Giving
Annual Fund
Assistance Fund
Benevolent Care Fund
Center for Lifelong Learning Contributions
Charitable Gift Annuities
Child Development Program Contributions
Culinary Classics
Employee Holiday Fund
Estate Gifts
Friends Nursing Home Contributions
Gifts in Kind
Golf Classic
Grants
Hicks Contributions
Hospice Program Fund
Memorial Contributions
Memorial Lights
Monthly Meetings
Restricted Fund
Tennis Classic
United Way
Unrestricted Fund
Worthington Scholarship Fund

COLLINGTON

Development Fund

COLLINGTON FOUNDATION

Fellowship Fund
Scholarship Fund
Arts and Culture Fund
Annual Fund

KENDAL AT GRANVILLE

Caring Friends Fund
Employee Appreciation Fund
Staff Development and Education Fund

KENDAL AT HANOVER

Cadbury Fund
Elizabeth Fry Fund
Clarence Pickett Fund
General Endowment Fund
Beveridge Webster Performance Fund
Joseph W. Davis III Fund
Sarah Sapir Eisen Child Care Fund
Employee Loan Program
Mary and Bryce Lyon Fund
Staff Vacation Fund
Staff Holiday Fund
Eudora Dronge Fund
Mel & Jinny Dickenson Home Care Fund

KENDAL AT HOME

Caregiver Appreciation Fund
Enrichment Fund
Member Assistance Fund
Restricted Fund
Unrestricted Fund

KENDAL AT ITHACA

Rainy Day Fund
Other Restricted Purposes
Unrestricted

KENDAL AT LEXINGTON

Barbara Brown Endowment Fund
Fellowship Endowment Fund
General Endowment Fund
Staff Development Fund
Borden Health Center Fund
Capital Campaign Fund
Dementia/Memory Fund
Fellowship Fund
General Gifts Fund
Landscape Fund
Staff Appreciation Fund
Sunnyside House Fund
Sustainability Fund
Unrestricted Fund
Webster Center Fund

KENDAL AT OBERLIN

Beth K. Stocker Endowment Fund
Barbara Thomas Leadership Development Fund
Kathleen Knipper Early Learning Scholarship Fund
Anna Poporad Aging Symposium Fund
Community Outreach Fund
Employee Emergency Fund
Other Restricted Purposes Fund
Residents Assistance Fund
Special Purpose Fund
Staff Holiday Fund
Staff Vacation Fund
Stephens Staff Education Fund
Sustainability Projects Fund
Mount Zion—Family Promise Partnership Fund
Neighbors Together
Tennis Project Fund
Laurence and Marjorie Porter Family Fund Endowment
Mary Jean and Bill Rice Family Fund Endowment
John Bartram Arboretum Endowment Fund

KENDAL CHARITABLE FUNDS

Conservation Fund
Endowment Fund
KENDAL | People Development Fund
Lloyd Lewis Fund for Promising Innovations
Unrestricted

KENDAL-CROSSLANDS COMMUNITIES

Anne Perry Fund
Crosslands Reserve Fund
A. & E. duPont Kendal Staff Support Fund
Helping Hands Program
Kendal at Longwood Reserve Fund
Kendal Crosslands Arboretum Fund
Kendal-Crosslands Communities Entry Fee Assistance Fund
Kendal-Crosslands Communities Environmental Stewardship Fund
Louise P. Mullestein Scholarship Fund
Robert N. & Lenora C. Zearfoss Fund for Crosslands Staff Support

KENDAL ON HUDSON

Kendal on Hudson Charitable Fund
Kendal on Hudson Residents Association

LATHROP COMMUNITIES

Employee Development Fund
Endowment
Land Conservation Fund
Music Matters Fund
Resident Assistance Fund
Staff Appreciation Fund
Sustainability Fund



Kendal Leadership

THE KENDAL CORPORATION

Sean Kelly, *President and Chief Executive Officer*
 Nora Adelmann, *Senior Vice President, Governance*
 Stephen Bailey, *Senior Vice President, New Business & Development*
 Howard Braxton, *Director, Sales & Marketing*
 Ben Butler, *Vice President, Culinary Services*
 Judith Braun, *Chief Operating Officer*
 Larry Elveru, *Director, Communications & Public Relations*
 Beverly Grove, *Senior Vice President, Philanthropy*
 Amy Harrison, *Chief Financial Officer*
 David Jones, *Vice President, Development*
 Ted Kirkpatrick, *Director, Analytics & Performance Improvement*
 Colleen Ryan Mallon, *Chief Marketing Officer*
 Gerald (Pete) McBrien, *Vice President, Physical Environments*
 Kurt Rahner, *Director, Information Technology*
 Joseph Savery, *Vice President, Information Technology*
 Wanda Whitted-Smith, *Senior Vice President, Human Resources*

KENDAL NEW YORK

Sean Kelly, *Chief Executive Officer*

KENDAL CHARITABLE FUNDS

Sean Kelly, *Chief Executive Officer*
 Beverly Grove, *Executive Director*

EXECUTIVE DIRECTORS OF KENDAL ORGANIZATIONS

Marvell Adams, *Collington*
 Nadia Geigler, *The Admiral at the Lake*
 Philip DeBaun, *Kendal-Crosslands Communities*
 Patricia Doyle, *Kendal on Hudson*
 Lynne Giacobbe, *Kendal at Home*
 Daniel Governanti, *Kendal at Ithaca*
 Linda Sterthous, *Barclay Friends*
 Douglas Helman, *Kendal at Granville*
 Dakia McMillian, *Chandler Hall*
 Beth Vettori, *Kendal at Hanover*
 Mina Tepper, *Kendal at Lexington*
 Barbara Thomas, *Kendal Northern Ohio/
Kendal at Oberlin*
 Thomas Wright, *Lathrop Communities*

RESIDENTS ASSOCIATION PRESIDENTS

Scott McCausland, *The Admiral at the Lake*
 Fred Thun, *Cartmel*
 Patricia Howard, *Collington*
 Ed Pease and Linda Clark, *Coniston*
 Lou Wonderly, *Crosslands*
 Pam Foster, *Kendal at Granville*
 Stew Wood, *Kendal at Hanover*
 Cindy Noble, *Kendal at Ithaca*
 Joseph Skovira, *Kendal at Lexington*
 Cynthia Kuespert, *Kendal at Longwood*
 Ann Francis, *Kendal at Oberlin*
 Robert Sanders, *Kendal on Hudson*
 Jim Dowell, *Lathrop Easthampton*
 David Morrissey, *Lathrop Northampton*

Kendal Boards

THE ADMIRAL AT THE LAKE

Joan Bransfield
Charles F. Clarke III
Richard Farmer
Graham C. Grady
Andrea O. Hasten
Sean Kelly
Carol Stitzer

THE ADMIRAL AT THE LAKE FOUNDATION

John Bross
Charles F. Clarke III
David Dalton
Clark Fetridge
Lester E. Fisher
Frances R. Grossman
Andrea O. Hasten
Nan Vaile

BARCLAY FRIENDS

Brad G. Barry
Ellen Barron
John Braceland
John Cigler
Lewis Charnock
Duane Davis
Elizabeth Guman
Peter Lane
Ron Madden
John Spangler
Winnie Stroup
Elizabeth Laube
Betsy Swan

CHANDLER HALL

Elizabeth Bayardi
Donald Bruckman
Alan Crosman
Phil DeBaun
Linda Flower
Karen Fulton
Sherrin Johnson
Odie LeFever
Dudley Saurman
Paul Sheehan
David Smith
Greg Wozniak

COLLINGTON

Alphonse Brown
Ken Burton
William Carrington
Sara Case
Randi Chapman
Annetha Hall
Tracy LaMondue
Kay Laughton
D. Michael Lyles
Cindy Medlock
Michael Nolin
Gerry Perez
Norman Prince
Peter Rheinstein
Jeffrey Williams

KENDAL AT GRANVILLE

Karen Chakoian
James Cooper
Tom Cummiskey
Thomas Gallant
Frank Giovannelli
Talya Greathouse
Julia Houpt
Molly Ingold
Richard Johnston
Robert O'Neill
Ruth Owen
Mary Paumier
Mike Rapp
Jessica Rettig
Becky Skeen

KENDAL AT HANOVER

Dulany Ogden Bennett
Frances Brokaw
Joan Burchenal
Nan Kirk Carroll
Robert Donin
John Harrison Jr.
John Hochreiter
Lawrence Kelly
John Kirk
Nancy Peregrim Marion
Dennis Mitchell
Anne Page
Stanley Pelli
Judson Pierson
Ellis Rolett
Spencer Simonds

KENDAL AT HOME

Timothy Beidleman
Jenny Campbell
Michael Carlin
Edna Chun
Andrew Fauver
William Gaskill
Joseph Haubrich
Francis Martines
Patricia Mezinskis
Allen Mix

KENDAL AT ITHACA

Martha Armstrong
Russell Bourne
David Call
Harold Craft Jr.
Susan Dale-Hall
Mary Pat Dolan
Betsy East
George Ferrari Jr.
Arnon Greif
John C. Gutenberger
Richard McDaniel
Andrew Miller
Susan Murphy
Mary Opperman
Debra Raupers
Andrew Simkin
Bryan Warren
Alene Wyatt
Paula Younger

KENDAL AT LEXINGTON

James Adams
Marylin Alexander
Priscilla Baker
Harlan Beckley
Charles Brower
Brian Connolly
David Ellington
Robert Glidden
Hardin Marion
John Page
Beatrix Rumford
Christopher Russell
William Russell
Bruce Summers
Carol Wheeler
Sally Wiant
Linda Wilder

KENDAL AT OBERLIN

Richard Baznik
Julia Binder
Midge Brittingham
Liz Burgess
Ruth Ann Clark
Dave Clash
Vance DeBouter
Mary Haber
John Hightower
Alexia Hudson-Ward
Dominique Hughes
Shankar Kurra
Ed Miller
Robert Monchein
Scott Moore
Alison Ricker
Diana Roose
Jack Southworth
Grace Tompos
Carmen Verhosek
Kathy Wright

KENDAL AT SONOMA

Spence Hamrick
Paul Kuenstner
Rob Lippincott
Greg McClune
Susan O'Connell
Will Rosenzweig
Susan Temple

KENDAL CHARITABLE FUNDS

Alphonse J. Brown Jr.
Jennifer Campbell
James Dowell
Carolyn Friedman
Julia Houpt
James Ingram
Marilyn Richards

KENDAL-CROSSLANDS COMMUNITIES

Marlane Chestnut
Jose Colon
Kay Edstene
Sally Harrison
Willard Hurd
Jonathan Huxtable
Michael Malone
Freeman Miller
Thomas Paxson
Susan Renz
Jeffrey Wise
Richard Wortmann

KENDAL FOUNDING DIRECTORS

Curtis L. Clapham
Nancy F. Darling
Anne W. Harrington
David L. Hewitt
Alan Reeve Hunt
Joanna B. Savery
Robert M.W. Taylor
Richard M. Worth
Sarah Edge Worth

KENDAL NORTHERN OHIO

Carol Bojanowski
Elizabeth Burgess
Annemarie Helm
John Hightower
Robert Monchein
Diana Roose

KENDAL ON HUDSON

Bard Bunaes
Marlene Calman
Edward Doty
Elizabeth Enloe
Ed Hanin
Aubrey Hawes
Joe Lillis
Kyle McGovern
Joanne Murray
Bert Pepper
Caroline Persell
Howard Smith
John Sorice
Lynn Tepper
Chip Wagner
Barry Whitcomb

THE KENDAL CORPORATION, KENDAL AGING, KENDAL NEW YORK

Carolyn Ainslie
Ken Aldridge
Louis Barbarin
William Benson
Joan Countryman
Harold Craft
Porter Dawson
Thomas Gibian
Annetha Hall
J. Harry Hammond
Ed Hanin
Ramona Kirwan
Robert Lippincott
Patricia Macpherson
Richard Melecki
George Mesires
Anne Page
Marilyn Richards
Richard Schramm
Susan Temple
Joseph Volk

LATHROP COMMUNITIES

Karen Clark
Susan Clopton
Jack Devlin
Lisa Halbert
Bruce Hawkins
Charles Johnson
Anne Lanning
Ann LeBrun
Robin Longo
Ellen Ober
Peter Rowe
Phebe Sessions
David Stevens
Peter Van Pelt
Joan Wofford
Marianne Zurn

OLD PEOPLE'S HOME OF THE CITY OF CHICAGO

John A. Bross
Charles F. Clarke III
Andrea O. Hasten
Sean Kelly
George Mesires
Gus Noble
Carol Stitzer
Nan Vaile
Fred Wackerle

Kendal Addresses

THE ADMIRAL AT THE LAKE

929 W. Foster Avenue
Chicago, IL 60640
773-433-1801
Email: info@admiral.kendal.org

BARCLAY FRIENDS

700 N. Franklin Street
West Chester, PA 19380
610-696-5211
Email: admissions@bf.kendal.org

CHANDLER HALL

99 Barclay Street
Newtown, PA 18940
215-497-0905 • 888-603-1973
Email: admissions@CH.Kendal.org

COLLINGTON

10450 Lottsford Road
Mitchellville, MD 20721
301-925-7706 or 1-800-540-1709
Email: tmosley@collington.kendal.org

KENDAL AT GRANVILLE

2158 Columbus Road
Granville, OH 43023
740-321-0400 • 1-888-607-6660
Email: admissions@kag.kendal.org

KENDAL AT HANOVER

80 Lyme Road
Hanover, NH 03755-1218
603-643-8900
Email: admissions@kah.kendal.org

KENDAL AT HOME

26040 Detroit Road, Suite 1
Westlake, OH 44145
440-835-8681 • 1-877-284-6639
Email: info@kahome.kendal.org

KENDAL AT ITHACA

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

KENDAL AT LEXINGTON

160 Kendal Drive
Lexington, VA 24450-1786
540-463-1910 • 1-800-976-8303
Email: info@kalex.kendal.org

KENDAL AT OBERLIN

600 Kendal Drive
Oberlin, OH 44074-1900
440-775-0094 • 1-800-548-9469
Email: admissions@kao.kendal.org

KENDAL-CROSSLANDS COMMUNITIES

P.O. Box 100
Kennett Square, PA 19348
610-388-1441 • 800-216-1920
Email: admissions@kcc.kendal.org

KENDAL ON HUDSON

1010 Kendal Way
Sleepy Hollow, NY 10591
914-922-1000 • 1-866-KENDAL NY
Email: admissions@kohud.kendal.org

LATHROP COMMUNITIES

100 Bassett Brook Drive
Easthampton, MA 01027
1 Shallowbrook Drive
Northampton, MA 01060
413-586-0006
Email: admissions@lathrop.kendal.org

THE KENDAL CORPORATION KENDAL CHARITABLE FUNDS

Worth Center
1107 E. Baltimore Pike
Kennett Square, PA 19348
610-335-1200
Email: info@kcorp.kendal.org



THE KENDAL CORPORATION

Kendal is a not-for-profit organization headquartered in Kennett Square, Pennsylvania, where ground was broken for the first Kendal community in 1971. The Kendal Corporation's role largely is to provide advice, leadership and support to the communities and services that make up the Kendal System primarily by helping to develop and disseminate model practices, facilitate economies of scale and advance responsible growth. As a system of not-for-profit communities, programs and services founded on the principles of the Religious Society of Friends (Quakers), Kendal aspires to transform the experience of aging, guided by Kendal's *Values and Practices*.



Kendal Affiliates are members of LeadingAge (formerly the American Association of Homes and Services for the Aging) and of the respective affiliated state associations:

- LeadingAge PA
- LeadingAge of Maine and New Hampshire
- LeadingAge Massachusetts
- LeadingAge New York
- LeadingAge Ohio
- Life Services Network of Illinois
- LeadingAge Maryland
- LeadingAge Virginia



Kendal at Longwood, Collington, Crosslands, Kendal at Hanover, Kendal at Oberlin, Kendal at Ithaca, Kendal at Lexington, Kendal at Granville and Kendal on Hudson are full-service continuing care retirement communities accredited by CARF, an international body that accredits organizations aspiring to excellence.



Barclay Friends and Chandler Hall are accredited by The Joint Commission, an independent, not-for-profit organization dedicated to improving the quality of care in organized health care settings.



The Kendal Corporation and its Affiliates are members of Friends Services for the Aging.

Kendal Affiliates consider and admit residents and members without regard to race, color, gender, sexual orientation, religion, national origin or any other characteristic protected by law.



The Kendal Corporation and Kendal Affiliates operate on the principle of equal opportunity for all qualified persons regardless of race, color, gender, sexual orientation, age, religion, national origin, disability, or any other characteristic protected by law in evaluating any person for employment, training, compensation, promotion or termination.

KENDAL®

Together, transforming the experience of aging.®

WORTH CENTER

1107 E. BALTIMORE PIKE

KENNETT SQUARE, PA 19348-2366

Check us out on Facebook at:
facebook.com/DiscoverKendal

