

Enhancing Well-Being | Promoting Understanding | Meeting Emerging Needs





**Enso Village**  
Healdsburg, California  
(under development)

**The Admiral at the Lake**  
Chicago Lakefront

ILLINOIS

OHIO

**Kendal at Granville**  
Granville, Ohio

**Kendal at Home**  
Serving Ohio

**Kendal on Hudson**  
Sleepy Hollow, New York

NEW YORK

NEW HAMPSHIRE

**Kendal at Hanover**  
Hanover, New Hampshire

**Kendal at Ithaca**  
Ithaca, New York

**Kendal at Oberlin**  
Oberlin, Ohio

MASSACHUSETTS

**LATHROP COMMUNITIES**  
Easthampton, Massachusetts  
Northampton, Massachusetts

**Kendal at Home**  
Serving 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.

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## A Culture of Generosity

Kendal's "Values and Practices" tie our system together. We share them with individuals thinking about becoming a member of a Kendal community, with staff before and after they are hired and with board members before and during their terms of service.

One of Kendal's values is its commitment "to foster a culture of generosity, encouraging and developing full use of time, talent and resources." Over the past year, Kendal residents, staff and board members have demonstrated their generosity of spirit in countless ways. Below are just three examples of that generosity.

Kendal Charitable Funds awarded a \$25,000 Promising Innovations grant in 2020 to fund a one-year initiative to decrease food insecurity

and help low-income older adults stay in their homes. The grant supported the Kennett Area Community Service (KACS) Senior Support Program in southeastern Pennsylvania.

"With this grant, we made 26 payments to 17 senior households," said KACS Executive Director Leah Reynolds. "The grant made possible 14 payments for rent or mortgage assistance, eight payments for electric bills, two payments for property taxes, one payment for heating assistance and one payment for a photo ID for a senior who could not access needed services due to the lack of a photo ID."

Promising Innovations grants were made possible by a gift of \$250,000 from the Janet Comey Foundation, established by the estate of Kendal at Longwood resident Janet Comey. Since 2007, the Promising Innovations campaign has raised over \$500,000 in matching gifts.

In Sleepy Hollow, New York, Kendal on Hudson residents and staff rallied in the face of the coronavirus pandemic to help those in the surrounding community. They made over \$60,000 in grants to fight food insecurity and support local public-school students. Grants to food pantries and Meals on Wheels helped meet increased demand during the economic downturn, and funds donated to a local foundation helped purchase laptops and provide high-speed internet access for families with children attending school online.

In November, the Delaware Valley chapter of the

Alzheimer's Association singled out KendalCares as the Top Corporate Team participating in its 2020 Walk to End Alzheimer's fundraiser. The KendalCares team included 27 Kendal Corporation staff members. Together they logged a total of 2,578 miles and raised \$5,480 to support the Alzheimer's Association. Kendal Charitable Funds added a \$5,000 matching contribution, bringing the total amount raised to \$10,480.

Kendal's residents, staff and board members clearly share the spirit of community, collaboration and generosity that flow from Quaker principles.

Thomas Gibian, Chair  
Board of Directors, The Kendal Corporation





## Enhancing Well-Being— Promoting Understanding— Meeting Emerging Needs

Under the heading “Quaker Roots” on page 23 of Kendal’s “Values and Practices” booklet, you’ll find this statement: “... the Kendal System reaches out to older adults to enhance well-being, to promote understanding, and to meet emerging needs.”

Over the past year, “reaching out” during the coronavirus pandemic required all of us to become reacquainted with the telephone and often craft new relationships with technology that enabled us to connect and build communities from a distance and to deliver care and compassion from far away or behind barriers.

In a year when handshakes were replaced by elbow bumps and hugs were replaced

by “smiling-eyes” we saw the Kendal System indeed reaching out—not with extended hands, but with hopeful hearts across our communities and indeed to the world that surrounds us. During this past year, we’ve seen new expressions of respect, integrity, stewardship, equality, wonderment, courage, love and community manifest among us. In the throes of crisis we have found and created joy among us.

It is my hope that as you turn the pages of this Annual Report you will draw inspiration from our attempts at speaking to these new ways of reaching out and connecting for the greater good. In these times especially, with courageous resolve, Kendal showed yet again what’s possible when we are willing to acknowledge the harsh reality around us, understand that reality, adapt to it, and actually grow and become stronger together.

Beyond the pandemic, the past year demanded that we look again at the values that underpin the Kendal System. The social unrest we experienced, rooted in renewed revelations about the abuses and violence against people of color in our nation called on us to speak from underlying Quaker values. We were called to speak to what we saw and commit to positive action.

At Kendal there is a real sense of obligation to lead toward an ever more reliably welcoming and open community for all people. Places where every single person is honored for who they are and the essential joy and light they

bring to this world. Kendal’s understanding starts with quiet so that the practice of listening to one another can prevail. Deep listening, born of sincere care and respect for every person is our foundation which supports the platform from which we are compelled to speak when we see unfairness, ignorance and violence so that we can together offer a vision of a better place and a means to continue the journey toward that vision.

The Kendal System includes organizations committed to good work and to delivering that work in light of its values. Together, we are transforming the experience of aging by enhancing well-being, promoting understanding and meeting emerging needs in new and inspiring ways that meet the challenges of each day. Thank you so much for your time and support.

Best,

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

Sean Kelly  
President and CEO  
The Kendal Corporation

## Admiral Wellness Coordinator Honored as a Rising Star



Michelle Roth, The Admiral at the Lake's Wellness Coordinator for Independent Living, was awarded LeadingAge Illinois' Rising Star Award for management in April 2020.

The award recognizes "individuals who have demonstrated an extraordinary performance within their first 12 months of employment. They have consistently demonstrated a strong work ethic, commitment, initiative, leadership and the ability to be a team player, and they routinely go above and beyond what is expected."

The organization's annual Honoring Excellence Award Program recognizes staff employed by LeadingAge Illinois member organizations who put quality first, deliver excellence and inspire others to do the same. LeadingAge Illinois posted a video on YouTube of Michelle working with Admiral residents.

<https://www.youtube.com/watch?v=ctrmiXQwyHU>

*"Everyone reacts to acclaim differently. Michelle was struck speechless. Followed by gratitude for the opportunity to create the change the award celebrates." — Nadia Geigler, CEO*

## Virtual Ribbon Cutting Marks Completion of Preston

"Good evening and welcome to the ribbon cutting for Barclay Friends' newest building, Preston," Executive Director Linda Sterthous said in kicking off the July 30 online celebration of the completion of construction of the 61,000-square-foot building. Barclay Friends is a Kendal-affiliated senior living community.

"We have over 170 people with us on Zoom tonight," Sterthous noted. "We would have loved to see each of you in person, but we thought it best to keep everyone safe by bringing Preston to you virtually, to your homes and offices."

Preston has 60 apartments, including 20 for residents in need of secure memory care. When it opened last summer, the building also provided accommodations for personal care and residential living. The look and feel of Preston will be intimate, with small memory care "neighborhoods," or clusters of rooms, to help residents feel at-home.

The layout of the new building will afford residents opportunities to enjoy natural light, as well as open spaces. Residents will have easy access to Barclay Friends' gardens, where they can spend time outside and plant flowers and vegetables. Families will enjoy visiting, knowing that the gardens provide safe, tranquil places to gather with loved ones outdoors in the fresh air.

Preston will feature new, modern amenities.

Dedicated spaces, including an art room, library, fitness room and hair salon will enrich residents' lives. Residents will also have opportunities for rehabilitative therapies through Barclay Friends' award-winning program. Preston has been constructed with steel and concrete, and the exterior features brick, stone

and siding known for its attractiveness, as well as durability and flame-retardant properties.

"The Preston building is an incredible example of [what] can be done when we put our minds to it, when we put our hearts to it and when we get after it together," said Kendal President and CEO Sean Kelly. "Thank you so much for letting us all, through



Kendal, be a part of your journey and feel the energy with you as you've taken on this incredible challenge and seen it through."

The building was named in honor of Dr. Ann Preston, a 19th century Quaker activist and physician who was one of the first women in America to become a medical doctor. Sterthous noted that Dr. Preston was "an abolitionist whose home was on the underground railroad and a champion for voting rights for women. She served as Dean of the Women's Medical College of Pennsylvania and founded a nursing school there. In choosing a name for this building, we felt that Dr. Preston's life and legacy represented much of what Barclay Friends stands for. ..."

# at Barclay Friends



*Preston offers Residential Living, Personal Care and Memory Care for individuals with milder forms of dementia. As residents' needs change, they may transition to Bartram Way or one of the skilled nursing neighborhoods.*

"For 127 years, Barclay Friends has been serving the needs of older adults in West Chester and the surrounding area," Board Chair John Braceland said. "Our mission is to continuously improve care of those aging across the continuum of services we provide. Our new facility is just one way we are serving these needs."

Sterthous and Braceland shared the ribbon-cutting honors at Preston's main entrance with Diane Williams, a Barclay Friends employee for 28 years who will serve as Preston's Personal Care Administrator.

The ribbon cutting celebration concluded with a virtual tour of several interior and exterior areas of Preston by Faith Woodward, Barclay Friends Director of Admissions and Marketing. To arrange a socially distanced personal tour, a virtual personal tour, or for additional information about Preston, call 610-696-3432 or email [fwood@bf.kendal.org](mailto:fwood@bf.kendal.org).



## Chandler Hall Hospice Recognized for Quality of Care

Chandler Hall announced in February 2021 that its Hospice program has been designated Deficiency Free by The Centers for Medicare and Medicaid Services (CMS), a department of Health and Human Services (HHS). In July 2019, HHS' Office of the Inspector General issued reports indicating that only 13% of Hospice programs participating in Medicare had met the stringent standards set by CMS.

### What Does Deficiency Free Mean?

According to CMS, Home Care including Hospice Care, as well as Skilled Nursing Facilities and Nursing Facilities, are required to comply with federal requirements to receive payment under the Medicare or Medicaid programs. Each of the 50 States, Puerto Rico and the District of Columbia has an agency that conducts on-site surveys for CMS to determine whether nursing homes are complying with federal requirements. Surveys are conducted on a nine- to 15-month cycle with a statewide average of 12 months.

### What Kinds of Things are Evaluated?

The evaluation is an all-inclusive look at each program and the services that are delivered. The

survey focuses on a variety of quality indicators, including:

- Understanding the levels of care offered
- Levels of supervision
- Family satisfaction
- Quality controls
- Infection controls
- Patient satisfaction

### What a Deficiency Free Designation Really Means

While a designation of deficiency free is a welcome accolade for any care program, to Chandler Hall it is an affirmation that its person-centered care philosophy is working for its patients. Person-centered care translates into quality care and better outcomes. It allows Chandler Hall to offer the very best of care in any setting. Receiving this accolade during a year beset by a pandemic is an exceptional accomplishment.

This designation affirms Chandler Hall's ethos, standards of care and commitment to its patients and their families.



# MedStar Health Brings Center for Successful Aging to Collington

Collington CEO Ann Gillespie announced in February that the continuing care retirement community (CCRC) has partnered with Maryland-based MedStar Health to bring the Center for Successful Aging to Collington. The partnership was initially developed in early 2019, and both parties have settled into a long-term agreement to provide state of the art medical services to Collington's residents across its 125-acre campus.

The Center for Successful Aging was established in 2014 at MedStar Good Samaritan Hospital, part of MedStar Health, the largest health care provider in the Maryland-D.C. region. MedStar Health's 10 hospitals, MedStar Health Research Institute and a comprehensive scope of health-related entities, are recognized regionally and nationally for excellence in medical care.

The Center is known for its holistic, person-centered care for older adults. The individual is an important part of the team and together they navigate the decisions about their own care, which is something Collington residents greatly value.

MedStar Health physicians take the time to learn about each patient's values and preferences for care, and as treatments move forward, the individual is involved in every decision.

The Collington-MedStar Health partnership emerged from Collington's intention to establish a navigation model of care and services, and the Center for Successful Aging's goal to pilot an onsite geriatric primary care clinic with a high-quality Life Plan Community.

"Collington residents are proactive and open-minded, and played a huge part in establishing the partnership," said Dr. George Hennawi, Chair of

"It has been a really supportive win-win experience. We were warmly welcomed by Collington's team and residents. It was beyond our expectations. It's a unique experience and we know this effort will serve as a promising model for other CCRC's nationwide," Dr. Hennawi said.

"It has been a pleasure to work with the Center for Successful Aging team and Dr. Hennawi," said Collington COO Megan Barbour. "Dr. Hennawi's compassion, expertise and understanding of unique care concerns that older adults may have, have been a great asset to Collington and to the health of the residents that we serve. Having access to such high-quality health care just a short walk from your home makes putting your health first an easily achievable goal for Collington residents and we are proud to be able to offer this service to them."

"The Collington leadership team's strong commitment to our collaboration is a key driver of our early success," Dr. Hennawi said. "We quickly formed an integrated team, which engendered confidence across the campus. It's not MedStar Health and Collington anymore, we are one team doing our best to take care of our people. People trust us to keep them safe and they are willing to listen to us. We are thrilled to work with Collington and are excited to see the program continue to grow."



*MedStar nurse practitioner Barbara Wawryszyn examines resident Liz Barbehenn.*

Geriatric Services and Medical Director of the Center for Successful Aging at Medstar Good Samaritan Hospital. The partnership includes ongoing collaboration with the Resident Health Services Committee to ensure the residents are getting as much out of the partnership as possible. Five days a week, MedStar Health clinicians provide Collington's independent living residents primary care in a primary care clinic.





## Live Music Returns for Kendal at Granville Residents

In a welcome return to normal pre-pandemic activities, Kendal at Granville residents gathered at the Midland Theatre in Newark, Ohio, Saturday, March 13, to enjoy the works of Bach and Mozart performed by the Newark-Granville Symphony Orchestra. The residents of Kendal at Granville were chosen as the audience for this concert because 99% of the 161 residents received both doses of the Pfizer-BioNTech COVID-19 vaccine during on-site clinics in January and February.

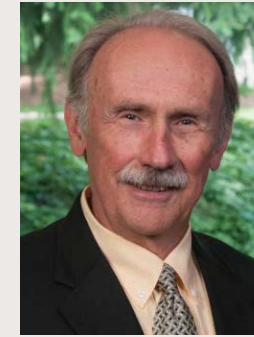
While a small audience of 50 residents was in attendance compared to the Midland's 1,800 seat capacity, there was excitement in the air for both those on the stage and in the crowd.

"Everyone was ecstatic to be there, especially after the year of COVID restrictions" said Larry Murdock, Resident Association President at Kendal. Another Kendal resident, Jane Cotsamire,

put it best stating, "It was a little bit of heaven. I loved every minute of it. It was so good to have a little bit of normalcy back."

"I was very tickled to be able to take the Kendal bus to hear live music for the first time in over a year," said Jane Karaffa, a Kendal at Granville resident and former flutist. "It was a wonderful treat."

Kendal residents, who appreciate the arts and lifelong learning, often attended concerts at the Midland in the past. One of the many challenges of the past year was to provide opportunities for those experiences. The Kendal at Granville Resident Council did an exceptional job of providing many virtual opportunities for lifelong learning, but all the residents agree there is nothing better than hearing music live.



### LeadingAge NY Names Hal Craft Trustee of the Year

Longtime Kendal at Ithaca Board member Harold D. "Hal" Craft Jr. was recognized by LeadingAge New York as its Trustee of the Year for 2020. The Trustee of the Year award is bestowed on

an individual who has served unselfishly and with distinction on the board of trustees of a LeadingAge New York member organization.

LeadingAge New York CEO Jim Clyne presented the award to Hal during a Dec. 16 Zoom meeting of Kendal at Ithaca's Board of Trustees. A member of Kendal at Ithaca's Board from 2009 through 2019, Hal served as Board Chair from 2013 to 2019. He currently is a member of The Kendal Corporation Board.

Hal is praised by colleagues for his wisdom, leadership, engagement and collaboration. His interactions with others are always characterized by adherence to the Quaker process and values.

The awards brochure noted that during his tenure as a Kendal at Ithaca trustee, Hal:

- Improved the orientation and education of Board members.
- Formed the Board's marketing committee.
- Formed an audit committee separate from the finance committee to enhance accountability.
- Led the strategic efforts to reposition Kendal at Ithaca through a \$30 million expansion and renovation project that was completed under budget and on time.

Hal is Vice President Emeritus of Cornell University, having retired as Vice President for Administration and Chief Financial Officer.



# Kendal at Hanover Staff Accredited for LGBTQ+ Competence

Kendal at Hanover has achieved Silver Status accreditation from SAGECare, a division of the country's oldest and largest not-for-profit organization dedicated to improving the lives of LGBTQ+ older adults. Silver Status accreditation indicates that more than 40% of Kendal at Hanover's staff has completed SAGECare's extensive online or in-person training. Kendal at Hanover is the only Life Plan Community in New Hampshire to achieve this status.

"We are proud of our partnership with SAGECare, but more importantly, we are proud to provide this training opportunity for Kendal's staff," said Executive Director Beth Vettori. "Broadening our staff's education enables us to support each resident to live to his or her full potential as we look to meet the needs of a diverse and inclusive community."

SAGECare's training includes lessons on quality of service, supports available to LGBTQ+ older adults and how to create a more inclusive community through best practices. More than 150 of Kendal at Hanover's 300 staff members have

participated in the training in the past year. Kendal at Hanover will attain Gold Status when 60% of staff complete the training, which is expected by the year's end.



"In order to meet the needs of the LGBTQ+ aging population, we need to be competent and educated on language barriers and have access to resources for improved care," said Tammy Bishop, Kendal at Hanover's Community Health Educator. "Through SAGE, we have access to evidence-based models and professional staff that support this growing community. The LGBTQ+ population is a consumer in the long-term care market, and their opinions, concerns and health care are incredibly important to us."

Kendal at Hanover and SAGECare plan to continue their partnership to serve LGBTQ+ individuals with the best care possible while making each older person feel comfortable with who they are. In

the next phase of the training, staff will work directly with residents around language, specific health care needs and social biases.



*Ann Francis and Nancy Lombardi, residents of Kendal at Oberlin, are among leaders in The Kendal System seeking to improve the lives of LGBTQ+ older adults.*

*Love is Love*





## Kendal at Lexington Residents Join Multigenerational Memoir Project

The popular Rockbridge Community Memoir Project through Virginia Military Institute looked a little different in 2020 when the popular in-person workshop went virtual during the coronavirus pandemic.

The collaboration between VMI cadets and English faculty, Lylburn Downing Middle School students, and residents of Kendal at Lexington gave participants the tools to craft stories of their life experience in a series of workshops. This was the third year for the program, which was started in 2018 as a service-learning project designed to represent the perspectives of three generations currently living in the area.

John South, a Kendal resident, was excited to be a part of the workshop for his third time.

### **It's Fun and a Service to The Community**

"There are three things I like about this project," South said. "One is interfacing with the cadets. They are good kids; it's refreshing and a lot of fun. Second, is learning how to present topics that will capture the attention of my

grandchildren and third, it's a service to the community." Writers met with a VMI cadet "pen pal" in a series of online, guided workshops to help them develop, write and publish their personal stories.

"One of the best ways to learn something is to teach it," South said. "The cadets research memoir writing techniques then talk about them with us."

Participants find the workshops motivate them to write about topics that might otherwise be forgotten. South has drawn on his childhood experiences of living in the Panama Canal Zone and teen years living in Brazil for subject matter in his writing. "Those were things I would not have written about had I not taken this class," he said.

### **Staying Connected Virtually**

While previous workshops were conducted in-person, this session was held on Zoom. South coordinated connection and technology assistance for Kendal participants. The memoir writing program began in mid-September and culminated with online public readings late in October.

# Kendal at Oberlin: Focus on Wellness Through the Pandemic

To meet the challenges of aging during a pandemic, Kendal at Oberlin turned to one of its most reliable and energizing tools.

Vitalize 360 is a holistic health and wellness program developed by Kendal Corporation and Hebrew Senior Life, a Harvard Medical School affiliate, to engage, challenge and inspire older adults to live full, healthy, vibrant lives. Kendal at Oberlin has offered the program to its residents for several years.

In early 2021, the Oberlin community co-sponsored a three-session virtual series with other Kendal affiliates entitled “Designing Your Best Day.” The series was presented by Rebecca Donato, Executive Director of Vitalize 360.

Rebecca explains the premise of the series:

“Our ability to live our best life, despite whatever circumstances we face, depends upon the intentions that we bring to how we live each and every day. Taking a step back to reflect upon the unique collection of ingredients that we need to live our own ‘best day’ is a strategy to ensure we use the precious gifts of our time and energy to the fullest extent possible. What’s more is that having a consistent rhythm to our day, particularly one that is in line with nature’s cycles, creates a stability for the body and mind that enhances our mental and physical well-being.”

Hundreds of older adults from across the country tuned in for the series, which is now available online at <https://tinyurl.com/u4b269>

## Vitalize 360 Enhances Resident Wellness at Kendal at Oberlin

Closer to home, Kendal explored other ways to enhance Vitalize 360’s reach.

First, here’s how 360 works. Jill Tvaroha, Kendal at Oberlin’s Wellness Coordinator and Certified Holistic Life Coach, sends each new resident a

welcome card, followed by a letter explaining Vitalize 360. “I tell residents the 360 refers to the 360-degree view of you,” Jill says.

Interested residents fill out a four-page “lifestyle survey” before meeting with Jill or Saun Howard, a fitness wellness specialist and Kendal’s other coach.

“This gives us an overview of the person we are meeting and helps the person start to think about the first step in the process,” Jill explains. “The wellness wheel is another part of the process and that helps shape the idea of balance and wholeness. Doing homework and working with your coach helps create a mindful, authentic plan.”

The survey covers a variety of topics from physical and recreational activities, diet and weight concerns and social relationships and spiritual needs.

This year, Kendal expanded the repertoire by adding group coaching based on the “designing your best day” series. Jill facilitated the group, which met twice a week for 4 weeks. The conversations were honest, with peer support and space for sharing. Surprisingly, residents talked little about the pandemic.

One of the participants was Bob Cothran, who has lived at Kendal for 12 years. “Before reaching this point I never would have dreamed that, at age 90, I would have any use, let alone a profound need, for life coaching,” Bob says. “Or, given that unlikely event that I would find desperately needed help not in private, individual work with a counselor, but in a small-group coaching setting with a gifted facilitator. My goodness, life does continue to be full of astonishing ... and sometimes welcome ... surprises, doesn’t it?”

Bob wanted to continue group coaching, so he signed up for another small group at Kendal that is focused on gratitude.



*Oberlin resident Bob Cothran talks with certified holistic life coach, Jill Tvaroha. The mural in the background of the photo was painted/created by Bob Cothran.*



Another spinoff of Vitalize 360 was an abbreviated lifestyle survey that the wellness staff circulated in November to find out how residents were dealing with the pandemic. Of the 208 surveys returned, 188 residents said, overall, they were “good” or “excellent.”

Other survey findings:

- The November election caused more stress than the pandemic.
- Most people were so glad to be at Kendal during this difficult time.
- Many residents included personal comments about staff members who made a difference in their lives, whether it was a housekeeper’s kindness, dining services staff delivering meals or another employee offering support.
- The biggest challenges residents faced were related to food and exercise issues.

Kendal at Oberlin continues to prioritize resident well-being with dedicated professional staff and spaces that are focused on providing:

- A variety of wellness programs offered by an experienced fitness center team;
- Art and music therapists who support residents in their exploration of creative outlets;
- An art studio where residents can paint, create pottery and design floral arrangements that are on display throughout the community center;
- A dedicated registered dietitian nutritionist who assists residents with their individual dietary concerns and creative menu planning;
- A grounds team (including a certified arborist) who collaborates with residents to support the outdoor environment and an accredited arboretum.

These are just a few examples of how Kendal at Oberlin has created an environment that supports residents’ wellness goals and enables each individual to live their own “best day”.



## Lathrop Residents Donate Travel Funds to ‘We the People’ Champs

The Resident Association of Lathrop Community in Easthampton, Massachusetts, has donated \$1,250 to Easthampton High School’s “We The People” team in recognition of their outstanding work, winning the national “We the People” finals competition.

Ellen Ober, President of the Resident Association, presented the check during a Zoom online meeting with the student group. “You are all so poised and smart, and we want you to use this donation to support your future trip to Washington, D.C.,” Ellen said.

“We are so proud of each of you,” said Thom Wright, Lathrop’s CEO. “We stand with you and share your values.”

Sponsored by the Center for Civic Education, “We the People” is a yearly competition involving high school students from throughout the United States. In preparation for the national finals, classes learn about government and study the Constitution and Bill of Rights. The motto for “We The People” is:

- Work hard
- Think deeply
- Prepare for the future

Lathrop’s Resident Association donated \$1,000, and the Lathrop Community contributed an additional \$250. Lathrop residents plan to meet with the student group to learn more about the “We the People” program.

# Kendal Honored for Handling of COVID-19 Communications



**PEPPERPOT  
AWARDS 2020**  
PRSA PHILADELPHIA CHAPTER | EST. 1968

The Philadelphia-area chapter of the Public Relations Society of America (PRSA) has recognized Kendal and its public relations consultants for establishing “a unified, consistent, yet customized

communications approach” in addressing the individual communication needs of its affiliates during the COVID-19 pandemic.

Kendal’s joint award entry with its consultants, AKCG Public Relations Counselors, won first-place honors in the Reputation & Brand Management category at PRSA Philadelphia’s 52nd annual Pepperpot Awards ceremony Dec. 7. The Pepperpot Awards recognize the most outstanding public relations campaigns and strategies submitted by organizations across the Greater Philadelphia area.

Consistent with Kendal’s commitment to transparency, maintaining open lines of communication with residents, family members and staff was the overarching goal—especially in responding to major COVID-related developments. Kendal marketing staff and AKCG also worked together to help affiliates decide how and when to report COVID-19 cases and how to reinforce them with messages of comfort, compassion and security when communicating to key audiences.



“Throughout the pandemic, Kendal Corp., AKCG and a variety of Kendal affiliates worked closely and collaboratively to protect the reputation of the Kendal brand and preserve the trust it and its affiliates had cultivated with key stakeholders,” AKCG noted in the award entry submission. “We accomplished this by establishing a consistent and unified approach to effectively identify, navigate and communicate pivotal and, sometimes grim, milestones at the outset of the pandemic (such as a first confirmed COVID-19 case, first death and major operational disruptions).”

As the virus spread across the country, affiliates reached these milestones at staggered points in time, sometimes weeks or even months apart from one another. For each milestone at each affiliate, AKCG and Kendal marketing staff worked to draft and refine direct communications to residents, their families, staff and prospective residents, as needed, to match each affiliate’s specific needs. Each affiliate also was encouraged to keep a chronological log on its website of all issued communications to maintain consistency of messaging to internal stakeholders and to news media.

The PRSA Philadelphia Awards were dubbed “Pepperpots” in 1968 by Bill Parker, then chapter president and head of Campbell’s Soup communication department, as a play on the “catch-all” Philadelphia pepper-pot soup to represent the effort and variety of ingredients PR professionals put into their campaigns.



# Even As We Break Ground, We Are Committed To Sustaining It

When the earth movers begin excavation to lay the foundation for Enso Village, it will reshape the landscape in more ways than one. Among the many ways in which this community will distinguish itself, none will be more rewarding to us than becoming the first Life Plan Community to achieve net zero sustainability status.

As a collaborative venture between Kendal and the San Francisco Zen Center, two organizations that share a foundational belief in environmental sustenance, it is not surprising that many green features have been engineered into the design of our buildings and campus. Our power will be all-electric with a significant amount generated by solar panels, and the use of smart design and the latest building management system will position the community for the highest achievable level of control, resident comfort and energy efficiency.

## Where every room is a green room.

Also for the first time at a Life Plan Community, Enso Village will incorporate “car barns,” an automated car racking system that safely accommodates staff and resident cars. This innovation will reduce construction costs, use land efficiently and reduce the carbon footprint of the project. It also sets the table for technology that is coming soon, including self-driving cars and app-based technology innovations.

Sustainability will even be a staple of our cuisine at Enso Village where an unprecedented array of vegetarian options will be freshly prepared from locally sourced ingredients whenever possible, and eventually our own gardens will contribute to the bounty of our kitchens.

Other sustainable design approaches include



electric charging stations for residents' cars, car share/ride share options, and integration with regional bike trails. In general, the design process has been guided by LEED gold, CalGreen and Title 24 standards, which include a commitment to extremely high environmental standards.

## Even our financing is green.

From an economic perspective, Enso Village will also be the nation's first Life Plan Community financed entirely with green bonds and the first Life Plan Community to adopt and embrace the practice of Contemplative Care, a discipline that incorporates both Zen philosophy and the learned experience of compassionate caregivers to provide medical, emotional and spiritual support.

## Sustaining our world, one life at a time.

At the philosophical heart of Enso Village is

a reverence for life in its impermanence and a recognition that all mortal beings share a responsibility that will outlive us. In our health care culture, the Contemplative Care model focuses on embracing the aging process as well as optimizing the quality and length of life. That same focus applies to our approach to environmental stewardship. We are committed as a community to repaying the generosity of the world that gave us life.

## First Things First

- 1st Kendal Community in the Western United States
- 1st Zen-Inspired Community
- 1st Green-funded Community
- Largest Capital Investment for a Senior Living Startup
- 1st Community to Practice Contemplative Care
- Commitment to become the 1st Life Plan Community to achieve net zero energy status

# Innovative 'Coffee Hour' Programs Bring Kendal at Home Members Together

Kendal at Home serves approximately 350 older adults living in their own homes across Ohio, Massachusetts and several other states. As the coronavirus pandemic evolved in early 2020, it was clear that Kendal at Home staff would need to rethink how to continue serving members without putting them at risk of contracting the virus.

After the pandemic prompted nationwide shutdowns in March 2020, Kendal at Home care coordinators "recognized the fear and anxiety that so many members were experiencing," says CEO Lynne Giacobbe. "We quickly put our emergency preparedness plan in place and began reaching out by phone immediately."

Staff implemented face-to-face online appointments with every member on a weekly basis, and care coordinators began assisting with online grocery ordering, sometimes actually doing the grocery shopping themselves for members. They also conducted online assessments and assisted with telehealth appointments with health care providers.

Care coordinators helped connect members online and also introduced weekly online coffee hours with a variety of guests to reduce social isolation.

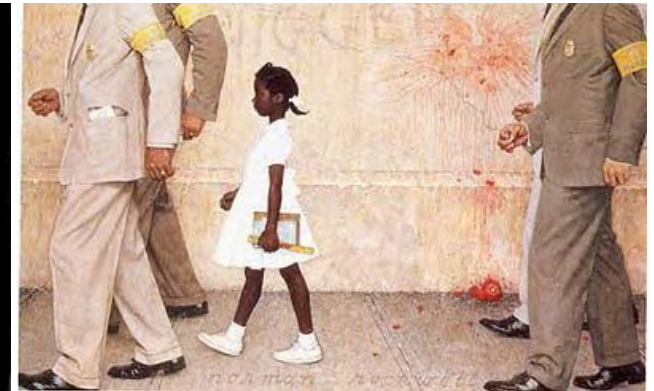
"Our first program brought together home care providers who spoke about the steps they were taking to protect clients from exposure to COVID-19," Lynne says. "The following weeks featured Quakers Judy Sorum Brown, who spoke on resilience, and Alan Kolp, who spoke on hope. They brought about a sense of calm, intentionality and a way forward, while emphasizing the importance of drawing on inner strengths to get through difficult times."

## Coffee Hour topics over the following months included:

- Norman Rockwell and civil rights
- Eleanor Roosevelt's advice columns
- A string quartet concert by Oberlin Conservatory of Music students
- An in-depth look at the 14th Amendment to the Constitution
- Estate Planning: Getting Started
- Estate Planning: Powers of Attorney and Health Directives
- The Bo & Bill Winiker Band: Swing into Spring
- Notorious RBG: The Life & Times of Ruth Bader Ginsburg
- Be Part of the Change: Three Generations of Social Justice
- Estate Planning: Benefits of a Trust

In April 2021, the Friends Foundation for the Aging provided Kendal at Home with a \$35,000 grant to underwrite programs to "support lifelong learning, health education, social interaction, exercise and creative outlets, all recognized as pillars of healthy aging."

The grant will be used to "develop and deliver a comprehensive wellness program ... to continue to build a virtual community of members regardless of where they live," Lynne says. "Our goal is to continue to reduce the risk of social isolation, which can be so detrimental to older adults as they age. These initiatives have engaged members in ways they would never had been able to participate in if they were conducted in person."





## Kendal on Hudson Helps Neighbors in Need

In 2020 we all faced incredible challenge and sacrifice. And while many of our normal day-to-day routines were put on pause, the residents and staff of Kendal on Hudson maintained their connection to each other and their community through their rich tradition of philanthropy.

Located in Sleepy Hollow, just outside the pandemic's New York City epicenter, the residents and employees of Kendal on Hudson felt compelled to help their nearby neighbors as the health crisis wore on. As part of Kendal on Hudson's community collaboration and philanthropic efforts, the campus supports programs and services that positively impact the lives of local citizens. With these deeply ingrained values, residents and staff understood that they needed to continue to act with their giving spirit and help the surrounding community.

"We are a part of the wider community and the wider community is a part of Kendal on Hudson," said Pamela Klapproth, CEO of Kendal on Hudson. "While the senior living community at large was facing difficult and isolating times, it is a testament to Kendal on Hudson's spirit that our staff and residents continued to live their values as they always have and put their energy into improving our shared community."

As the COVID-19 crisis worsened, families all over the country – including in towns local to Kendal on Hudson – became strained. Many families began facing the challenge of putting food on the table and students who were suddenly

attending school virtually at home began to struggle academically due to lack of equipment or internet access. Kendal on Hudson responded to these needs and dedicated its outreach effort toward the local families whose lives were so severely impacted by the pandemic.

Kendal on Hudson provided over \$60,000 in grants for food insecurity initiatives and for resources for students in the Public Schools of the Tarrytowns

to benefit families in the surrounding area. Grants were provided to local food distribution sites, food pantries and the Meals on Wheels program to help meet the increased demand. Thousands of dollars' worth of non-perishable goods also were donated to a local food drive. Further donations were made to the local foundation for the public schools to purchase laptops and provide high-speed internet access for families with children attending school at home. Over the course of the

year, Kendal on Hudson's generosity provided thousands of meals to families during their time of need and helped students stay connected with their schools and continue their studies from home.

For the residents of Kendal on Hudson, there always is mutual joy to be found in helping others, and during the pandemic this has resonated strongly. Kendal on Hudson's residents and staff found their philanthropy efforts empowering and gratifying because doing their part to help others and making a positive difference – especially during this time – is a reward in and of itself.



# Kendal at Hanover SafeGuard Certified for Infection Control

Many residents, their families, and staff want to know that senior living communities are committed to maintaining safe and healthy environments now more than ever before.

On April 12, Kendal at Hanover became the first Life Plan Community in the United States to receive SafeGuard Certification, a 58-point infection control and hygiene inspection program developed by Bureau Veritas. The certification is meant to give “quality assurance to clients, residents, family members and guests that all necessary steps have been taken and maintained to ensure enhanced infection controls.”

“Infection control is something we take very seriously, and this can be seen in our training, our policies and our daily work,” said JoAnn Coulombe, Kendal at Hanover’s Director of Environmental Services. “Receiving this certification is a reflection of the hard work and dedication our staff have taken to keep our residents and employees safe.”

Bureau Veritas, recognized as a world leader in testing, inspection and certification services, spent one day at Kendal at Hanover focusing on

community-specific infection control policies, documentation of staff training and knowledge of COVID-19 protocols, personal protective equipment

Culinary Services & Procurement. “Veritas previously has done hospital inspections, including for the Cleveland Clinic. This was a new opportunity.

Bureau Veritas was looking for a post-acute community for a pilot survey, and this clearly speaks to Kendal at Hanover’s openness to innovation.”

Bureau Veritas’s hygiene and medical staff experts designed the senior living program’s guidelines and survey checklists on infection control and prevention, with Cleveland Clinic acting as Chief Medical Officer.

“This was a very thorough process, and it was clear that the surveyor was incredibly detail-oriented,” said Coulombe. “It was a great learning experience for everyone involved and I am grateful for the opportunity and receiving their SafeGuard Certification.”

Founded in 1828 in Belgium, Bureau Veritas is a world leader in testing, inspections and certification services. With more than 78,000 employees, they are present in 140 countries through a network of over 1,500 offices and laboratories.

supply and usage, and sanitizer and hygiene practices.

“This was done as a pilot and offered to Kendal through our relationship with Entegra, our new procurement service partner for affiliates,” said Ben Butler, the Kendal Corporation’s Vice President for





# Barclay Friends Volunteers Clean Up Stretch of Adopted Highway

On a chilly Saturday morning in November, a group of staff volunteers gathered in Barclay Friends parking lot and set off on a mission. That mission was to find and bag as much litter as they could find along a stretch of road on state Route 100, and just beyond the U.S. Route 322 bypass on/off ramps. Barclay Friends adopted this stretch of highway

near its campus in West Chester, Pennsylvania, in early 2019 through the Adopt-a-Highway program sponsored by the Pennsylvania Department of Transportation.

When the pandemic hit in March 2020, all community benefit programs came to a screeching halt. Meanwhile, the trash along this roadway kept

piling up. Armed with safety vests, work gloves, trash bags (and masks), the small group of Barclay Friends staff volunteers collected 12 bags of trash including an array of car parts. It is a modest affair yet rewarding as they continue to keep this neighborhood of the West Chester Community looking great.





# Kendal-Crosslands Communities Embrace HOPE

## Humbled, Optimistic, Prepared and Energized

Lady Bird Johnson eloquently said, “Where flowers bloom, so does hope.” The former first lady’s words have resonated with the residents and staff members at Kendal-Crosslands Communities.

It's a new day at KCC. Although masks are still the new normal and social distancing continues, the hope that arrived with COVID-19 vaccinations early in 2021 gave residents and staff a promising new outlook on life in the community. Springtime proved to be a perfect season for lifting spirits and celebrating life as blooms burst forth on KCC's 500-acre campus.

Kendal-Crosslands Communities embarked on a HOPE campaign, inviting residents and staff members to share their HOPE in many ways. Notecards and postcards were available to write a word of hope, and hope-themed magnetic buttons

were distributed to over 1,600 residents and staff members.

Banners in community centers at both Kendal at Longwood and Crosslands allowed residents and staff to share their hopes.

"I used the notecards and postcards and sent a few words of gratitude to the Kendal at Oberlin staff for taking such good care of my mother." — Bill, Coniston Resident

"What a great idea. Hope is a thing with feathers, and I'll wear my pin. Isn't hope an incredible feeling." — Lowell, Crosslands Resident

"I love the Lady Bird Johnson wildflowers theme. It is reminiscent of a birth, renewal, and beauty. We need that right now." – Carol, Staff Member

"Hope for live theater, travel, friends visiting, peace and even Red Sox baseball victories ..."

## Residents and staff have HOPE. We are:

**Humble** — We are humbled that we received the vaccine when they have not been widely available. We are grateful that our staff members worked diligently and blessed that we have high vaccination rates at our community.

**Optimistic** — We are optimistic that with everyone working together as one family, following the guidelines for opening campus activities issued by the CDC or the Departments of Health, our Medical Director, and other health officials, we will remain safe.

**Prepared** — We are prepared with the knowledge of this virus, following the science every step of the way. We have our masks. We know to stay socially distant, wash our hands, and be vaccinated. We have all the tools. Should the variants continue to be a menace, we can pivot and are prepared to change our operating practices accordingly to continue to be safe.

**Energized** — We have new energy, almost a “pep in our step.” Staff members are thrilled to get back to regular housekeeping, maintenance, and culinary schedules and see more residents daily. Residents have a renewed energy to ‘see’ one another in the center and not only on a Zoom.





# KCC Vaccinates 99% of Residents & 90% of Staff

In March 2020, Kendal-Crosslands Communities pulled out its Emergency Preparedness Pandemic Plan and quickly got to work to mitigate the spread of COVID-19. At that time, no one imagined that a year later 99% of residents and 90% of staff members would be vaccinated. CVS pharmacy team members administered the Pfizer vaccine to over 1,300 people in the community ... twice.

"We are grateful that staff worked successfully with our CVS Health partners in administering 10 vaccination clinics on our campus since January," said Lisa Marsilio, KCC's Chief Executive Officer, in March 2021. "The hope is our vaccination success provides us the ability to begin to open areas within our community safely."

CVS, Walgreens and other pharmacy chains, partnered with the Centers for Disease Control and Prevention (CDC) to offer on-site COVID-19

vaccination services nationwide for residents in nursing homes, assisted living and personal care homes.

"The Federal Pharmacy Partnership provided Kendal-Crosslands Communities the ability to work with CVS and vaccinate our residents and our staff members," says Donna Taylor, KCC's Chief Health Services Officer. "The partnership was an effective program that provided critical supply chain management of the vaccination process, including storage and the fulfillment of reporting requirements."

KCC provided educational seminars for residents and staff, as well as a video interview with the Medical Director, to address vaccination myths and misinformation.

"Our residents lived through our world's history with polio, measles and chickenpox immunizations,

and our residents shared their personal stories, which helped our staff members understand that vaccines are necessary for immunity," Marsilio said.

"Personal conversations also helped with our high vaccination success," Taylor said. "Some staff simply had some questions about their unique health concerns."

Kendal at Longwood, Crosslands, Coniston, and Cartmel Resident Association presidents also helped with KCC's vaccination success. The presidents partnered with staff leadership and provided valuable guidance with their residents, especially during uncertain times with heightened emotions.

"We are grateful for the presidents' tireless efforts during this pandemic, and our model of collaborative leadership is a proven winner," Marsilio said. "Our hope is here; we are blessed."



*Susanna Davison  
Kendal at Longwood*



*Betty Warner  
Kendal at Longwood*



*David Rhoads  
Crosslands*



*Jane Roberts  
Crosslands*



*Marcia and Bill DeWitt  
Coniston*



*Pat Mapps  
Cartmel*

# System Finances

**THE KENDAL SYSTEM**, founded in 1971, consists of not-for-profit senior-living communities, programs and services founded on the principles of the Religious Society of Friends (Quakers). Kendal's *Values and Practices* tie our system together. The System has evolved to its current federal-style model with 13 operating affiliates throughout the country (when it opens, Enso Village will be the 14th Affiliate in the System). Each of the Affiliates is an independent 501(c)(3) organization with its own board of directors and close ties to the local community. In the federal model, The Kendal Corporation has responsibilities for coordination and facilitation of the System as a whole — it is not a centralized or directive authority. Financial resources and obligations are unique to each Kendal organization, thereby providing the best of both worlds: sensitivity and responsiveness to local environments and culture combined with the advantages of being part of a larger, values-based system. The narratives that follow provide context for the financial results and is unique to each Affiliate. The Kendal Corporation does not prepare consolidated financial reports for the Kendal System.

**THE KENDAL CORPORATION** focused much of its attention and resources during 2020 on helping affiliates respond to the global pandemic, centrally sourcing PPE, locating and vetting suppliers of PPE for affiliate direct purchase, supporting the pivot to virtual and remote environments for nearly all disciplines with a focus on marketing and key constituent communication, coordinating ongoing education in response to the pandemic as well as available pandemic relief. Like many organizations, The Kendal Corporation closed the Worth building in mid-March and transitioned its entire workforce to remote and virtual work for the duration of the public health emergency.

The pandemic negatively impacted revenue, with postponement or cancellation of market research, consulting, and emerging development resulting in a 40% decline in these service lines. Two affiliates

struggled through the pandemic and are deferring the Kendal System Fee. To partially offset these losses, The Kendal Corporation applied for and received a Paycheck Protection Program loan in order to maintain all staff positions and services at pre-pandemic levels. We expect this loan to be forgiven.

The work around securing PPE resulted in the creation of Quantum, a Kendal-led procurement initiative that enables us to better support our affiliates by leveraging our combined scale to reduce prices, improve service and bring the discipline of procurement to the Kendal System, work that will continue to benefit us for the duration of and long after the pandemic.

The Kendal Group Health Plan provided comprehensive health benefits to nearly 800 employees, insuring over 1,200 lives during 2020. The plan ended the year with over \$4,000,000 in reserves on hand, with about \$790,000 being "excess reserves." By consensus of the participating affiliates, the excess reserves were maintained in the plan as a precaution against the long-term impact of the pandemic on claims expense.

The Kendal Corporation continued to work toward mitigating the risk related to our defined benefit pension plan. All the participants in that plan now have a frozen benefit, and we recorded a decrease in the pension benefit liability of \$589,000, about 4.5%. We have expanded Kendal-sponsored retirement benefits to include 403(b) plan and 401(a) retirement savings plans to continue to attract top talent and provide stable retirement options for our employees. The Kendal-sponsored retirement plans have a combined market value of nearly \$190,000,000 and provides benefits for over 1,230 participants in the pension plan, more than 3,300 in the 403(b) plan, and about 1,000 in the relatively new 401(a) plan<sup>1</sup>.

—Amy Harrison, CFO

**THE ADMIRAL AT THE LAKE** continued its operational excellence and achieved a net operating margin of 15% during 2020, putting the community in approximately the 85th percentile of all CARF-accredited communities. 2020 was the first year of a principal payment since refinancing \$150.94

million of debt in 2017. This refinancing allowed The Admiral to achieve significant savings in debt service. The COVID-19 global pandemic resulted in The Admiral incurring approximately \$600,000 of pandemic-related expenses. To offset these costs, The Admiral received a Paycheck Protection Program loan in the amount of \$1.5 million that was fully forgiven in 2021. In addition, The Admiral received approximately \$350,000 of federal relief funds. The Admiral continued to invest in its employee education program and provided just under \$74,000 in tuition assistance to 25 employees. Finally, The Admiral, in conjunction with The Admiral at the Lake Foundation, was able to provide approximately \$363,000 in financial assistance to residents in need during 2020.

—Daniel Churchill, CFO

**BARCLAY FRIENDS** — 2020 was a year of highs and lows at Barclay Friends. The COVID-19 pandemic negatively impacted the occupancy at Barclay as it has in so many other communities, significantly reducing revenues. Costs skyrocketed as the supply of Personal Protective Equipment fell far short of demand, driving up prices; staff COVID testing was routine and expensive; and Hero Pay was provided to team members to recognize the challenges faced in the workplace. In all, Barclay estimates it lost \$2,000,000 in revenues compared to 2019 and incurred nearly \$750,000 of additional expenses in 2020 as a result of the pandemic. Federal and State relief programs offered financial assistance during the pandemic, with \$887,000 coming from Provider Relief Funds and \$1,600,000 coming from the Paycheck Protection Program by way of a forgivable loan. Throughout all of this, construction on the new Personal Care and Residential Living building, Preston, was completed in early summer and celebrated this milestone with a virtual event attended by 170 people. Preston is designed to be a home-like modern setting with 60 apartments, open and airy common spaces, and multiple gardens available to its residents. Forty apartments are dedicated for Personal Care and/or Residential Living, and 20 apartments are within Bartram Way, a secured area with a memory care focus. In August, Barclay was elated to welcome its

<sup>1</sup>Beneficiary counts not unique; participants may be vested in more than one retirement plan.



first residents to Preston and by yearend Preston was one-third full.

—Jennie Bury, Director of Finance

**CHANDLER HALL** withstood the volatility and challenges of 2020 by remaining committed to its values and continuing to serve the community through the pandemic. Even though there were staffing challenges and pandemic-related moratoriums on admissions not related to conditions at Chandler Hall, the community ended the year in compliance with its liquidity covenant, but unable to achieve compliance for the debt-service coverage ratio. Chandler Hall was transparent in discussions with its investor and received a waiver of default shortly after the end of the year. Chandler Hall received just under \$700,000 in pandemic relief funds from state and federal sources, and a Paycheck Protection Program loan of \$2,163,160. Chandler Hall qualifies for forgiveness of the PPP loan and will apply for forgiveness in 2021. Although lost revenue and pandemic-related expenses exceeded the total relief funds, Chandler Hall has reserved \$150,000 for continuing pandemic expenses in 2021. Chandler Hall's Hospice at Home program was robust in 2020 with the covered beneficiaries increasing by nearly 40% over the course of the year. This was offset by declines in occupancy across most of the care levels on campus. Chandler Hall ended 2020 with occupancy in Friends Nursing Home at 56%, Hicks Memory Care 80%, Personal Care 83%, Llenroc Residential Living 67%, Independent Living 90%, and the Hospice Pavilion at 100%. The community has renewed its commitment to stabilizing its operations and continuing to serve the Bucks County community and is reorganizing its leadership and management structure to achieve the strategic goals developed by the Board of Directors.

—Amy Harrison, on behalf of Chandler Hall

**COLLINGTON** overcame the challenges of 2020 and ended the year with 298, or 92.5%, of its Independent Living residences occupied. Collington ended the year with a Debt Service Coverage Ratio of 2.10x, a net operating margin of 13.1% and 245-days cash on hand. During the COVID-19 pandemic, Collington

received CARES Act Provider Relief Grant Funds of \$367,722 to help offset the cost of responding to the pandemic, and a Paycheck Protection Program loan in the amount of \$2,469,000. Collington qualifies for forgiveness of the Paycheck Protection Program loan and will apply for forgiveness in 2021. During 2020, Collington maintained a keen focus on operational excellence, continued implementation and execution of the community's 2018-23 Strategic Plan, and further solidified the strategic focus for the community over the next five years. The collaboration among residents, the Board of Directors and Leadership team during the strategic planning process continues to benefit the community even with gatherings being held virtually. Collington's key initiatives are Health and Wellness, Stakeholder Engagement, Stewardship of Resources and Partnerships. The Collington Foundation, a supporting organization, invested in the mission of Collington by funding \$31,000 in scholarships for employees and providing over \$79,000 in support for residents with financial hardship. In 2020, the Collington Foundation received over \$285,000 in donations.

—Courtney Corcoran, CFO

**KENDAL-CROSSLANDS COMMUNITIES** had another year of strong positive results, with an excess of revenues over expenses of approximately \$5 million, driven by net income from operations of \$578,500 and including realized gains of approximately \$983,000 and net unrealized gains on equity securities of approximately \$3.44 million for 2020. Net assets increased to approximately \$95.5 million in the same period. KCC has maintained a strong cash and investment position relative to debt obligations, with \$113 million in unrestricted cash and investments, compared to just over \$48.5 million in long-term obligations and more than 894 days cash on hand at year's end. Kendal-Crosslands Communities enjoyed overall occupancy of approximately 95%, across a diverse array of living options in 2020.

—Edward Plasha, Director of Finance

**KENDAL AT GRANVILLE's** primary focuses this past year were to keep our residents and staff members safe and to ensure their needs were being met. All

things considered, the community fared very well. The community welcomed 10 new households, however that did not keep pace with those individuals who transitioned out of independent living. Decreases in occupancy in assisted living and skilled nursing also occurred. The community has developed a strategy to place its focus back on occupancy for 2021. During 2020, net assets decreased by \$268,796, with revenue decreasing by 4% from 2019 to 2020 and expenses decreasing by 0.4% for the same period. The community received funding from the Cares Act and the Paycheck Protection Program, which helped to offset expenses incurred during the year.

—Jennifer Bobak, Finance Manager

**KENDAL AT HANOVER** will remember FY 2020 as a challenging year in responding to the COVID-19 pandemic. In April 2020, Kendal at Hanover applied to participate in the Paycheck Protection Program of the Cares Act and received a loan in the amount of \$2,154,520. Kendal at Hanover qualifies for forgiveness of the loan and plans to apply for forgiveness in 2021. When the loan is forgiven, that amount will be recognized as revenue in 2021. In addition, due to the Coronavirus pandemic, the U.S. Department of Health and Human Services made \$307,832 in emergency relief grant funds available to Kendal at Hanover during FY 2020. These funds have been recorded as a liability on the balance sheet and are expected to be recognized as revenue in 2021 as additional pandemic-related expenses are incurred.

Kendal at Hanover had income from operations during 2020 of approximately \$664,000. In addition, the community had non-operating gains of approximately \$2.81 million during the year, largely generated from the financial and market value returns of its investment portfolio. The average residential occupancy for Kendal at Hanover in 2020 was 96.6%, while the average occupancy for Assisted Living–Level 1 was 87.8%, Assisted Living–Level 2 was 81.24%, and the Whittier assisted living (our memory care area) generating an overall occupancy of 86.1%. The lower occupancy with our assisted living units was directly impacted by

the expansion and renovation of the community's Health Center that began in June 2018. The Health Center Project, which is estimated to have a capital cost of approximately \$33.7 million, is scheduled for completion in early May 2022.

Kendal at Hanover continues to maintain a "BBB+ stable" investment grade rating by Fitch Ratings due to its steady financial performance, strong market position, consistent entrance fee receipts from unit sales, and Days Cash on Hand ratio of 883 at the end of 2020. Of further note, Kendal at Hanover earned the A.V. Powell & Associates exemplary recognition seal for its Actuarial Compilation Report for the period ending December 31, 2020.

—Brent Edgerton, Associate Executive Director/CFO

**KENDAL AT HOME's** commitment to its members to enable them live the life they want from the home they love took on an entirely new meaning in 2020. Our vision for 2020 was continued growth in our Ohio markets and a concentrated focus in Western Massachusetts expanding beyond our partnership with the Lathrop Community into the broader market. The reality quickly became the critical role we played in connecting our 348 members and supporting them through the global coronavirus pandemic. Kendal at Home nimbly adapted to the new virtual world and brought its members on that journey offering a new level of engagement and connection. We built an online offering of programming ranging from education and entertainment to connection with our medical director, to exercise, and simple conversation and comradery that everyone needed to get through this difficult time.

We also adapted our sales seminars to reach prospects virtually without losing the personal connection that is so important to our sales process. Kendal at Home welcomed 40 new members including 10 in our expansion markets—a 43% improvement over the previous year. Our prior investments in technology and building an exceptional staff allowed for a quick pivot to remote work without decline in productivity or service to our members, while keeping staff safe and supported. Efficient operations and the strong performance of

our investments produced a decrease of \$92,138 in our net deficit—a 126% improvement over the previous year. The strength gained in 2020 will propel Kendal at Home to the exponential growth we have been planning for.

—Karen Graham, Controller

**KENDAL AT ITHACA** Despite the unique challenges it faced in 2020, Kendal at Ithaca's operating and financial performance were exceptional. Management navigated the pandemic with limited CARES Act support and no use of the Paycheck Protection Program. Approximately \$1 million of unbudgeted expenses associated with the pandemic were incurred to help protect the health and safety of residents and staff. Thanks to diligent enforcement of safety and testing protocols, there were no deaths from COVID-19, nor any significant outbreaks on our campus. During 2020, Kendal at Ithaca's occupancy and census remained very stable. Independent living occupancy finished the year at 87%, with average IL occupancy rising for the fourth consecutive year. Health Center census declined slightly from the prior year but still averaged above 91%. The strong census helped grow total revenue by \$1.7 million or nearly 6.5% over 2019. Kendal at Ithaca also saw improvement in several key financial indicators. Days Cash on Hand at the end of the year was very healthy at 753 days. As a result of the continued revenue growth, steadily growing cash reserves, and a sound balance sheet, S&P Global Ratings affirmed Kendal at Ithaca's credit rating of "BBB+" with a stable outlook. In addition, impressive results on key actuarial measures enabled Kendal at Ithaca to once again earn A.V. Powell's Exemplary Recognition Seal.

—Gregory Sommers, CFO

**KENDAL AT LEXINGTON** Despite the many challenges faced in 2020, Kendal at Lexington finished the year in a positive financial position. The Phase III expansion and renovation project continued with the final eight Sunrise Ridge cottages completed in the first quarter of the year. Total number of residential apartments and cottages is now 150. With an average residential living census of 95.1%, net residential services revenue of \$8,462,000 exceeded budget by

2.0% and \$1.6 million from 2019.

The coronavirus pandemic and the construction project in the Borden and Webster Health Centers added complexity to how services were provided. Occupancy for the Centers remained steady, but well below budget. Average 2020 occupancy for skilled nursing and assisted living was 79.0% and 64.0%, respectively. Despite lower occupancy, total Health Center revenue of \$5,451,000 increased by 1.9% from the previous year. Overall, total revenue for the community increased \$1.4 million (7.0%) from 2019. This included \$310,000 in Provider Relief Funds. Kendal at Lexington received a forgivable Paycheck Protection Program loan of \$1,369,000, which is reflected as a liability at the end of the year. Total expenses for the year of \$17,907,000 increased 14.6% from 2019. \$570,000 (25%) was attributable to new capital assets related to Phase III construction. In addition, there were \$362,000 in COVID-related expenses.

Kendal at Lexington welcomed 22 new residents with total entry fees of \$6.2 million, slightly over half of that was attributable to first generation fees from the new cottages. Excess of revenue over expenses was \$2.5 million while total net assets increased by \$2.8 million. At yearend, Kendal at Lexington had 817 Days Cash on Hand and the Debt Service Coverage Ratio was a healthy 2.91. The Board of Directors completed the 2020-2025 the Strategic Plan. Short-term initiatives include IT infrastructure, recruitment and retention strategies, workplace culture, dining experience and resident services and amenities.

—Felicia Bush, Chief Financial Officer

**KENDAL AT OBERLIN** The significance of enhancing well-being and meeting emerging needs took on a very different perspective in 2020. Kendal at Oberlin's use of the Vitalize 360 tool and other community-sponsored programs such as "Designing Your Best Day" supported residents throughout the coronavirus pandemic. Kendal at Oberlin continues to prioritize resident well-being with dedicated professional staff and spaces that are focused on enhancing the lives of



those we serve. Some of the key financial milestones achieved in 2020 included:

- Kendal at Oberlin's balance sheet, as of Dec. 31, 2020, improved when compared against the 2019 results. The improvement is primarily related to receiving the Paycheck Protection Program Loan/Grant in the month of May which was recorded in cash and in Other Long-Term Liability (\$1.7 Million).
- The investment portfolio grew by \$5.5 million during the second half of the year, which contributed to the increase in the total assets. Kendal at Oberlin has a diversified investment portfolio that follows an Investment Policy Statement approved by the Finance Committee and the Board of Directors.
- Kendal at Oberlin's Operating results indicate an ability to maintain revenue growth when compared with prior year levels by 4.1% due to ending the prior year with strong occupancy levels in independent living and maintaining that occupancy level throughout 2020.
- Total expenses tracked ahead of prior year levels by 5.0% due to necessary cost increases to support the COVID-19 pandemic with labor costs, additional personal protective equipment, cleaning supplies and an increased use of paper products.
- During 2020, Kendal at Oberlin received notification of a Named Endowment Estate Gift of \$500,000 and a Beneficial Interest in Trust of approximately \$400,000 that are for the benefit of The Residents Assistance Fund. These gifts were in the making as part of the 25th Anniversary Initiative and demonstrate the benefit of estate planning.

There was a significant amount of volatility throughout 2020 that presented several operational challenges. Because Kendal at Oberlin has a long-term strategic focus, we were able to continue to navigate through the pandemic and support the residents with innovative programming that allowed them to enhance their well-being and meet emerging

needs. This was a year unlike any other.

**KENDAL ON HUDSON**, located 25 miles north of New York City, emerged from one of the epicenters of the coronavirus pandemic with a strong balance sheet and solid operating performance. Independent living occupancy at the end of 2020 was 92.3% with a total of 23 move-ins during the year generating \$16.3 million in entrance fees. Operating revenues for the year, excluding amortization of entrance fees, were below budget by approximately 3% primarily due to shortfalls in health care occupancy out of an abundance of caution for resident safety during the pandemic. Operating expenses for the year, excluding depreciation and amortization, exceeded budget by approximately 4%, including \$1.3 million of additional expenses related to the pandemic. Funding of approximately \$347,000 received from the Provider Relief Program and a Paycheck Protection Program Loan of approximately \$2 million helped to offset the pandemic related expenses. Kendal on Hudson was in compliance with all debt covenants at the end of the year. —*Jean Eccelston, CFO*

The **LATHROP** Communities encountered unexpected circumstances and challenges in 2020 due to the onset of the COVID-19 pandemic in March. The Lathrop Community shifted its entire focus for the year to the safety and security of its residents. The coronavirus challenge was met with success—as evidenced by only three mild cases on our campuses—that culminated with making vaccinations available to all residents and staff in January 2021. Lathrop Community maintained a high level of occupancy, with 97% in the townhomes and 91% in the apartments at The Inn. Marketing efforts have ensured a healthy waiting list. Over the course of 2020, Lathrop invested approximately \$700,000 in property improvements and paid off debt in excess of \$350,000. In 2021, Lathrop plans to address deferred maintenance on the existing campuses and will make a final decision as to the potential expansion plan on the Easthampton campus. —*Holly Smith-Bove, CFO*

# The Kendal Corporation Condensed Financial Information

beginning 1/1/20 and ending 12/31/20

## BALANCE SHEET

Assets	
Cash and Investments	3,751,860
Receivable from Affiliates and Intercompany	2,460,702
Other Assets	<u>20,753,957</u>
Total Assets	<u>\$26,966,519</u>
Total Liabilities	23,502,912
Without Donor Restrictions	1,750,513
With Donor Restrictions	<u>1,713,094</u>
Total Net Assets	3,463,607
Total Liabilities and Net Assets	<u>\$26,966,519</u>

## Statement of Operations

Operating Revenue	
System Fees from Affiliates	8,427,888
Development Fees	601,528
Investment and Other Income	<u>438,463</u>
Total Operating Revenue	9,467,879
Expenses	10,585,303
Operating Gain (Loss)	(1,117,424)
Non Operating Revenue	
Reserve Fee from Affiliates	274,032
Realized Gains (Losses) on Investments	178,936
Change in Defined Benefit Pension Plan	589,304
Unrealized Gains (Losses) on Investments	<u>1,027,385</u>
Increase (Decrease) in Unrestricted Net Assets	<u>\$952,233</u>

# Kendal Operating Affiliates Selected Financial Information

Fiscal year ending	The Admiral at the Lake 12/31/20	Collington 12/31/20	Kendal-Crosslands 12/31/20	Kendal at Granville 12/31/20	Kendal at Hanover 12/31/20	Kendal at Ithaca 12/31/20	Kendal at Lexington 12/31/20	Kendal at Oberlin 12/31/20	Kendal on Hudson 12/31/20	Lathrop Communities 12/31/2020	Barclay Friends 12/31/2020	Chandler Hall 12/31/2020	Kendal at Home 12/31/2020	Kendal Northern Ohio 12/31/2020
<b>Total Assets</b>	<u>\$149,964,320</u>	<u>\$84,706,173</u>	<u>\$240,827,957</u>	<u>\$52,097,055</u>	<u>\$187,421,102</u>	<u>\$112,120,569</u>	<u>\$109,756,130</u>	<u>\$123,781,532</u>	<u>\$198,828,526</u>	<u>\$20,932,425</u>	<u>\$56,754,422</u>	<u>\$26,412,529</u>	<u>\$7,561,040</u>	<u>\$127,960</u>
<b>Total Liabilities</b>	281,850,764	114,401,453	145,382,231	64,726,555	131,601,708	98,120,352	96,789,337	70,930,338	209,434,014	45,453,260	22,396,780	34,529,921	13,086,060	76,324
<b>Net Assets</b>														
<b>Without Donor Restrictions</b>	(142,575,260)	(34,102,086)	74,556,285	(12,809,286)	44,072,701	12,097,413	11,139,857	46,695,743	(10,605,488)	(25,073,580)	32,040,062	(8,836,884)	(5,554,662)	45,479
<b>With Donor Restrictions</b>	10,688,816	4,406,806	20,889,441	179,786	11,746,693	1,902,804	1,826,936	6,155,451	0	552,745	2,317,580	719,492	29,642	6,157
<b>Total Net Assets</b>	<u>(131,886,444)</u>	<u>(29,695,280)</u>	<u>95,445,726</u>	<u>(12,629,500)</u>	<u>55,819,394</u>	<u>14,000,217</u>	<u>12,966,793</u>	<u>52,851,194</u>	<u>( 10,605,488)</u>	<u>(24,520,835)</u>	<u>34,357,642</u>	<u>(8,117,392)</u>	<u>(5,525,020)</u>	<u>51,636</u>
<b>Total Liabilities and Net Assets</b>	<u>\$149,964,320</u>	<u>\$84,706,173</u>	<u>\$240,827,957</u>	<u>\$52,097,055</u>	<u>\$187,421,102</u>	<u>\$112,120,569</u>	<u>\$109,756,130</u>	<u>\$123,781,532</u>	<u>\$198,828,526</u>	<u>\$20,932,425</u>	<u>\$56,754,422</u>	<u>\$26,412,529</u>	<u>\$7,561,040</u>	<u>\$127,960</u>
<b>OPERATING SUMMARY</b>														
<b>Total Income</b>	21,760,006	31,665,728	58,269,697	14,007,676	30,238,457	27,856,225	19,115,466	22,722,381	34,268,569	6,043,837	12,513,498	17,118,814	4,581,562	128,190
<b>Total Expense</b>	<u>29,002,085</u>	<u>29,892,271</u>	<u>57,838,084</u>	<u>14,572,859</u>	<u>29,574,818</u>	<u>26,894,417</u>	<u>17,906,550</u>	<u>19,935,149</u>	<u>32,732,744</u>	<u>7,071,719</u>	<u>14,581,982</u>	<u>19,851,439</u>	<u>5,119,349</u>	<u>79,097</u>
<b>Gain (Loss) from Operations</b>	(7,242,079)	1,773,457	431,613	(565,183)	663,639	961,808	1,208,916	2,787,232	1,535,825	(1,027,882)	(2,068,484)	(2,732,625)	(537,787)	49,093
<b>Realized Gain (Loss) on Sale of Investments</b>	(2,753)	4,538	982,742	0	234,062	845,489	45	1,954,836	1,397,545	6,841	0	163	11,351	0
<b>Unrealized Gain (Loss) on Investments</b>	199,428	1,491,441	7,689,002	3,564	4,462,094	1,342,692	1,362,226	3,540,187	456,860	137,022	1,178,677	435,945	615,166	0
<b>Change in Value of Interest Rate Swap/Caps</b>	0	0	35,125	0	(1,488,038)	0	0	0	0	0	(1,316,677)	0	0	0
<b>Change in Obligation to Provide Future Services</b>	4,123,884	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Unrestricted Contributions</b>	323,138	336,181	146,823	54,830	147,832	0	525	42,261	0	110,724	389,764	190,867	3,408	0
<b>Assets Released from Restriction for Capital</b>	0	0	0	0	0	15,643	1,361,356	0	0	0	109,825	0	0	0
<b>Gain (Loss) on Property, Plant and Equipment</b>	0	0	0	(5,579)	(15,673)	700	(41,367)	0	0	0	0	0	0	0
<b>Loss from early retirement of debt</b>	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Other</b>	<u>52,450</u>	<u>0</u>	<u>(16,629)</u>	<u>317,711</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>(426,920)</u>	<u>0</u>	<u>0</u>	<u>27,457</u>	<u>0</u>	<u>0</u>
<b>Incr (Decr) in Net Assets without Donor Restrictions</b>	<u>\$(2,545,932)</u>	<u>\$3,605,617</u>	<u>\$9,268,676</u>	<u>\$(194,657)</u>	<u>\$4,003,916</u>	<u>\$3,166,332</u>	<u>\$3,891,701</u>	<u>\$8,324,516</u>	<u>\$2,963,310</u>	<u>\$(773,295)</u>	<u>\$(1,706,895)</u>	<u>\$(2,078,193)</u>	<u>\$92,138</u>	<u>\$49,093</u>



# 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.

AFFILIATES’ FUNDS		FY 2020
Resident Assistance		\$33,008,849
Employee Assistance		\$4,328,918
To Benefit Kendal Community		\$22,914,878
To Benefit Wider Community		\$238,016
Expectancies from CGA’s, Unitrusts & Bequests		<u>\$14,299,300</u>
<b>Total</b>		<b>\$74,789,961</b>
KENDAL CHARITABLE FUNDS		
For Kendal Charitable Funds Benefit		\$3,736,656
Expectancies for Affiliate Benefit		\$1,087,340
<b>Total</b>		<b><u>\$4,823,996</u></b>
<b>GRAND TOTAL</b>		<b>\$79,613,957</b>

\* Does not include statistics from Chandler Hall and Lathrop Communities.

The Kendal Corporation does not own its affiliates or any of their assets. The Kendal System uses a federal-type model that seeks to obtain the best of two worlds: sensitivity to local circumstances with most decision-making at a local level, plus the opportunity to benefit from being part of a larger system. Oversight of each Kendal organization is provided by a local volunteer board of directors, and residents and community members serve together on those boards.

## \$25,000 Kendal grant funds program to reduce senior homelessness

Kendal Charitable Funds awarded a \$25,000 Promising Innovations grant for 2020 to fund a one-year initiative to decrease food insecurity and help low-income older adults stay in their homes. The grant supported the Kennett Area Community Service (KACS) Senior Support Program in southeastern Pennsylvania.

In its grant application, KACS stated that the grant would allow it to partner with the Kennett Area Senior Center “to prevent homelessness, reduce hunger and promote health and well-being among Southern Chester County seniors.” The grant was intended to allow KACS and Senior Center staff to create a continuum of care for older adults coordinated between the two agencies.

Unfortunately, the COVID-19 pandemic intervened, forcing the Kennett Area Senior Center to suspend operations in mid-March 2020 to keep its “employees, volunteers and guests informed, healthy and safe.” Nonetheless, KACS succeeded in using the \$25,000 grant to support many older adults in need.

“With this grant, we made 26 payments to 17 senior households,” says KACS’ Executive Director Leah Reynolds. “The grant made possible 14 payments for rent or mortgage assistance, eight payments for electric bills, two payments for property taxes, one payment for heating assistance and one payment for a photo ID for a senior who could not access needed services due to the lack of a photo ID.”



During 2020, KACS provided emergency assistance to a total of 63 households with 97 older adults, including 168 payments amounting to more than \$129,800 to those households. That assistance helped pay electric, heat, water, rent, mortgage, property taxes, security deposits and other expenses for older adults threatened with homelessness.

"We're the premier agency for the county when it comes to dealing with homelessness," Reynolds says.

"We navigate these problems with them, and it's complicated. We often find out there are several other issues they really need help with," Reynolds says.

Many of KACS's clients are Spanish-speaking immigrants from Latin America who work in low-wage jobs in the area, including the local mushroom-growing industry. All four of KACS's case managers/advocates are bilingual.

"The local mushroom farms are always looking for employees, yet they don't seem to be able to provide enough housing for the folks who work for them," Reynolds says. "A very high percentage of the folks we see are employed, but they're underemployed or underpaid. That's a major issue."

A panel of leading experts on aging selected KACS's proposal for funding from among 132 letters of intent and 12 finalists from across the nation. Promising Innovation grants provide seed money for new or expanded services that are in keeping with Kendal's Values and Practices.

"The Grant Selection Committee came to consensus on your proposal because of its potential for change and replication," Beverly Grove, Kendal Charitable Funds Executive Director, noted in a letter informing KACS that it had been awarded a \$25,000 grant. "The committee was most impressed by the meaningful collaborations and partnerships that you hope to establish through this project, the

materials that will be developed and your excellent track record with other projects."

### About Kendal Charitable Funds

Established in 1989, Kendal Charitable Funds raises and disburses funds in support of Kendal's charitable purposes, including many outreach efforts. In 2007, the Kendal Charitable Funds board approved the creation of the Lloyd Lewis Fund to support advances in serving older adults through the Promising Innovations campaign. The fund and campaign were made possible by a gift of \$250,000 from the Janet Comey Foundation, a private foundation established through the estate of former Kendal at Longwood resident Janet Comey. Since then, the Promising Innovations campaign has raised over \$500,000 in matching gifts, more than tripling the size of the Lloyd Lewis Fund.



# Social Impact

## Kendal Honored as Top Walk to End Alzheimer's Corporate Team

The Delaware Valley chapter of the Alzheimer's Association singled out KendalCares as the Top Corporate Team participating in its 2020 Walk to End Alzheimer's fundraiser. The team was recognized, along with several individual team members, during an online Walk Celebration Party in November.

The KendalCares team included 27 Kendal Corporation staff members.

Together they logged a total of 2,578 miles and raised \$5,480 to support the Alzheimer's Association. Kendal Charitable Funds added a \$5,000 matching contribution, bringing the total amount raised to \$10,480.

"Many of our team members have seen dementia up close, and supporting the Association in its research and advocacy efforts gives hope that someday we will see the first survivor of Alzheimer's," said KendalCares team leader Diane Massey, Director of Community Engagement. "We walk to support the cause for senior living communities, and we walk for those close to us who have experienced Alzheimer's and other dementias."

Kendal corporate staff were encouraged to get up and move each day in support of the Walk to End Alzheimer's as part of a Miles for Memories team challenge. Nora Adelman, Kendal's Senior Vice President for Governance, took team honors for Most Miles Walked with a total of 252 miles. Several other team members logged close to 200 miles each.

Nineteen KendalCares team members raised \$100 or more. Nora, Diane and CMO Colleen Ryan Mallon all won recognition as Champion fundraisers by each raising at least \$500. Grand Champion honors went to CFO Amy Harrison for raising the most funds, \$1,185.

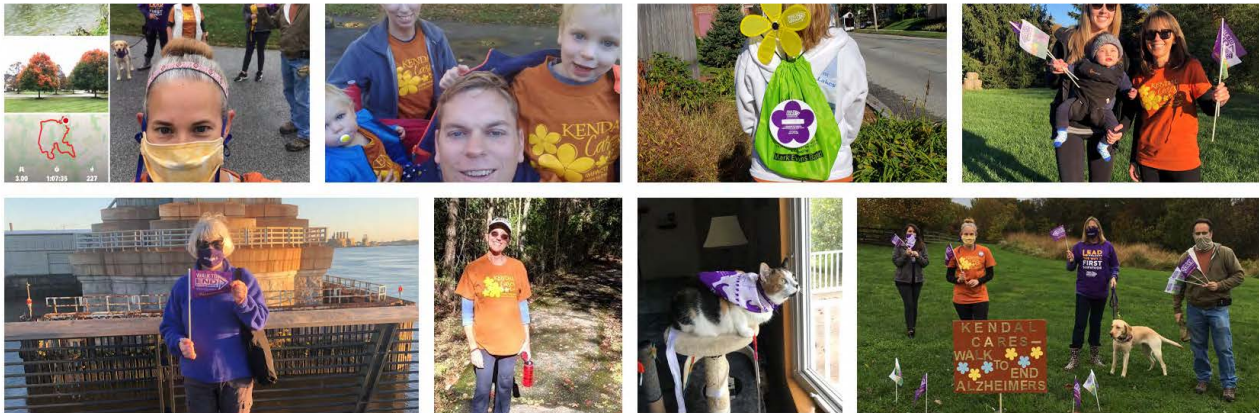
The KendalCares team first participated in the Walk to End Alzheimer's with eight members in 2018. In 2019, 17 staff joined the team and raised \$3,627, which was matched with a \$2,500 corporate sponsorship, bringing the total Alzheimer's Association contribution to \$6,127. Those first two years, KendalCares team members walked together on a single day.

This year, Diane says, "COVID threw us a huge curve ball, but it also made the effort all the more meaningful." Because of the pandemic, team members walked alone, or masked in small socially distanced groups, and logged their steps over several weeks.

To keep team members motivated, Diane

provided weekly walk updates during corporate staff meetings on Zoom that included short videos from the "Living with Alzheimer's" film project. In addition, four speakers also joined separate virtual staff meetings to discuss a wide range of dementia-related subjects.

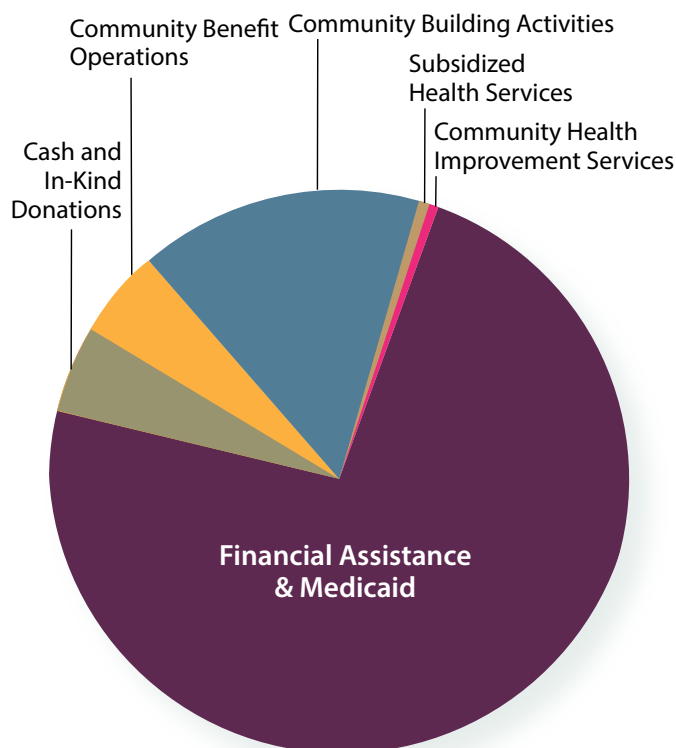
- Kim Kohler, a Certified Dementia Trainer from The Admiral at the Lake, talked about education.
- Jody Trinsy, a Delaware Valley Walk to End Alzheimer's organizer, talked about how walk funds are used by the Alzheimer's Association.
- Annetha Hall, a Kendal Corporation Board member and Director of Operations and Special Programs for the Alzheimer's Association, talked about the organization's national and global focus and advocacy.
- Stacy Terrell, Chief Health Services Officer at Kendal at Oberlin, talked about his and Kendal President and CEO Sean Kelly's involvement with the Alzheimer's Roundtable initiative.



# Kendal System 2020 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 for the betterment of the community.

COMMUNITY BENEFIT CATEGORIES NET BENEFIT	Persons Served	Benefit
Community Health Improvement Services	1,066	\$8,926
Subsidized Health Services	0	\$6,038
Cash and In-Kind Donations	21,917	\$91,191
Community Building Activities	113,505	\$602,727
Community Benefit Operations	0	\$110,436
Financial Assistance & Medicaid	3	\$3,297,937
<b>TOTAL</b>	<b>136,491</b>	<b>\$4,117,255</b>



## What is a Community Benefit?

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.

## Taking Responsibility in the Larger Community

"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....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



## Together, transforming the experience of aging.®

Kendal's *Values and Practices* tie our system together. We share them with individuals thinking about becoming a member of a Kendal community, with staff before and after they are hired and with Board members before and during their terms of service.

We strive to live up to these Values every day:

- Honoring and respecting every person
- Encouraging diversity and inclusion and treating every person as an equal
- Fostering community through transparency, collaboration and listening
- Promoting continuous revelation and lifelong learning
- Acting with integrity and generosity
- Delivering innovative wellness and dignified health care
- Sustaining and improving the environment
- Building meaningful partnerships

Sharing these common values help ensure that Kendal's residents and staff share the spirit of community and collaboration and the respect for each individual that flow from Quaker principles.

# KCorp Human Resources Team Honored as HR Department of the Year

In November, Kendal Corporation's four-person Human Resources team was named Delaware Valley HR Department of the Year. KCorp's HR team also won recognition for Benefits & Compensation Management, as well as Employee Communication. Now in its 23rd year, the award recognizes HR professionals "for what they do and the growth and change they produce within their organizations."

The award recognized the HR team's rapid response to the departure from normal operations required by the coronavirus pandemic, including design and implementation of a variety of Hero Pay and premium pay programs for Kendal's 14 affiliates in nine states.

KCorp's HR team members are Wanda Whitted-Smith, Senior Vice President of Human Resources; Marsha Perry, Vice President, Human Resources; Kimberly Dunn, Director, Talent Acquisition and Onboarding; and Jeanine Williams, HRMS Administrator. Together, the department oversees the Human Resources Information System (HRIS) for all Kendal affiliates, payroll, a benefits consortium, recruiting, training, regulatory compliance in all states (and cities) where affiliates are located, and consultative services on employee relations issues. In addition, KCorp's HR team supports its own employee base in the corporate office.

Wanda accepted the award on behalf of the HR team during a virtual afternoon celebration, Nov. 5.

View a video of Wanda's acceptance message on Vimeo: <https://vimeo.com/476419109>



**Wanda Whitted-Smith**  
Senior Vice President,  
Human Resources



**Kim Dunn**  
Director, Talent Acquisition  
and Onboarding



**Marsha A. Perry**  
Vice President, Human  
Resources



**Jeanine Williams**  
HRMS Administrator





# Kendal Leadership

## THE KENDAL CORPORATION

Sean Kelly, *President and Chief Executive Officer*  
 Marvell Adams Jr., *Chief Operating Officer*  
 Nora Adelmann, *Senior Vice President, Governance*  
 Stephen G. Bailey, *Senior Vice President, New Business & Development*  
 Crystal Baker, *Controller*  
 Howard Braxton, *Director of Sales & Marketing*  
 Ben Butler, *Vice President, Culinary Services & Procurement*  
 Cara Cassner, *Director, Digital Marketing*  
 Kim Dunn, *Director, Talent Acquisition & Onboarding*  
 Larry Elveru, *Director, Communications & Public Relations*  
 Beverly Grove, *Senior Vice President, Philanthropy*  
 Amy Harrison, *Chief Financial Officer*  
 Lisa Holloway, *Vice President, Health Services*  
 Laura Jones, *Director, Market Research & Strategy*  
 Eva Kaeten, *Director, Executive Services, Office of the President*  
 Ted Kirkpatrick, *Director, Analytics & Performance Improvement*  
 Frank Mandy, *Vice President, Development*  
 Diane Massey, *Director, Community Engagement*  
 Marsha A. Perry, *Vice President, Human Resources*  
 Kurt Rahner, *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 DIRECTOR/CEO OF KENDAL ORGANIZATION

Nadia Geigler, *The Admiral at the Lake*  
 Linda Sterthous, *Barclay Friends*  
 Ann E. Gillespie, *Collington*  
 Douglas Helman, *Kendal at Granville*  
 Beth Vettori, *Kendal at Hanover*  
 Lynne Giacobbe, *Kendal at Home*  
 Laurie Mante, *Kendal at Ithaca*  
 Jan Bigelow, *Kendal at Lexington*  
 Lisa Marsilio, *Kendal-Crosslands Communities*  
 Barbara Thomas, *Kendal Northern Ohio/  
 Kendal at Oberlin*  
 Pamela Klapproth, *Kendal on Hudson*  
 Thomas Wright, *Lathrop Communities*

## RESIDENTS ASSOCIATION PRESIDENT

Minna Taylor, *The Admiral at the Lake*  
 Pat Mapps, *Cartmel*  
 Marian Fuchs Collington  
 Bill and Marcia DeWitt, *Coniston*  
 David Rhoads, *Crosslands*  
 Larry Murdock, *Kendal at Granville*  
 Bob Keene, *Kendal at Hanover*  
 Maryann Nagro, *Kendal at Ithaca*  
 Dianne Herrick, *Kendal at Lexington*  
 Susanna Davison, *Kendal at Longwood*  
 Mary Behm, *Kendal at Oberlin*  
 Hank Schacht, *Kendal on Hudson*  
 Roger Herman, *Lathrop Easthampton*  
 Jack Hjelt and Elizabeth Rumelt, *Lathrop Northampton*



# Kendal Boards

## THE ADMIRAL AT THE LAKE

Nick Aghakhan  
Justin Bhandari  
Joan Bransfield  
Ned Budd  
Karen Carney  
Christine DeLeo  
Sean Kelly  
Laura McKee  
George Mesires  
Charles Montario-Archer  
Naoko Muramatsu  
Gus Noble  
Jordan Shields  
Michael E. Traynor  
Fred Wackerle

## THE ADMIRAL AT THE LAKE FOUNDATION

Mike Biver  
Gwen Cohen  
Gus Noble  
Jordan Shields  
Sarah Shirk  
Michael E. Traynor  
Wally Verdooren

## BARCLAY FRIENDS

Ellen Barron  
John Braceland  
John Cigler  
Susan Cusack  
Duane Davis  
Ellen Gilbert  
Elizabeth Guman  
Sony John  
Angela Lavery  
Ron Madden  
Krys Sipple  
Serita Spadoni  
John Spangler  
Winnie Stroup  
Nelson Wicas

## CHANDLER HALL

Betsy Bayardi  
Glenn Beasley  
Jenna Davis

Sherrin Johnson  
Dennis Kilfeather  
Lorraine Muth  
Paul Sheehan  
David Smith  
Greg Wozniak

## COLLINGTON

Christal Batey  
Will Carrington  
Linda Ewald  
Peter Fielding  
Elizabeth Gill  
Beverly Goggins  
Michael Lyles  
Mike Nolin  
Adam Osteryoung  
Norman Prince  
Peter Rheinstein  
Mike Twigg

## KENDAL AT GRANVILLE

Andy Crawford  
Tom Cumiskey  
Reed Fraley  
Frank Giovannelli  
Melissa Green  
Talya R. Greathouse  
Connie Hawk  
Molly Ingold  
Dick Johnston  
Nancy Neely  
Jessica Rettig  
Greg Sharkey  
Becky Skeen  
Christie Vargo  
Todd Ware  
Frank White

## KENDAL AT HANOVER

Frances Brokaw  
Nan K. Carroll  
Lisa C. Celone  
Robert B. Donin  
Robert Drysdale  
Sean M. Gorman  
John L. Harrison Jr.  
Lawrence A. Kelly  
Ruth Lappin

Lisabeth L. Maloney  
Nancy Marion  
Bridget Mudge  
Sherri C. Oberg  
Judson T. Pierson  
Margaret Rightmire  
Michael Urnezis

## KENDAL AT HOME

Heather Ahearn  
Timothy Beidleman  
Jenny Campbell  
Michael Carlin  
Edna Chun  
Andrew Fauver  
Joseph Haubrich  
Alan Kolp  
Francis Martinez  
Allen Mix

## KENDAL AT ITHACA

Davina Desnoes  
Mary Pat Dolan  
Betsy East  
Mary Ann Erickson  
George P. Ferrari, Jr.  
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## 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 and of the respective affiliated state associations:

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



Collington, Kendal at Granville, Kendal at Hanover, Kendal at Ithaca, Kendal at Lexington, Kendal at Oberlin, Kendal-Crosslands Communities, 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 Alliance.

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.



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