

unity.  
knowledge.  
imagination.

KENDAL<sup>®</sup>

*Together, transforming the experience of aging.<sup>®</sup>*

ANNUAL REPORT  
2022

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

**The Admiral at the Lake**  
Chicago Lakefront

ILLINOIS

OHIO

**Kendal at Home**  
Serving Ohio &  
Northern Kentucky

**Kendal at Oberlin**  
Oberlin, Ohio

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

**Kendal at Ithaca**  
Ithaca, New York

NEW YORK

NEW HAMPSHIRE

**Kendal at Hanover**  
Hanover, New Hampshire

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

**Collington**  
Metro Washington, D.C.

VIRGINIA

**Kendal at Lexington**  
Lexington, Virginia

Kendal Communities  
branch out far and wide.



## Unity

- 6 | Collington Establishes John Fofana Memorial Scholarship
- 10 | Celebrating 25 Years with COVID Accommodations at Kendal at Ithaca
- 14 | Kendal on Hudson Partners with Hearts and Homes for Refugees
- 16 | The Kendal System Participates in United Effort to Support Alzheimer's Support and Research
- 18 | The Kendal Corporation Announces Alliance for Voters' Rights
- 28 | The Kendal System Launches Diversity, Equity, Inclusion and Belonging Initiative

## Knowledge

- 8 | Kendal at Hanover Residents and Staff Discuss 'How to Be an Antiracist'
- 9 | Kendal at Home Expands Service Area
- 11 | New Air Quality Technology Helps Residents of Kendal at Lexington Stay Safe
- 12 | Technology Enhances Resident and Community Engagement in Oberlin
- 19 | Nora Adelman Leaves Legacy Upon Retirement

## Imagination

- 4 | The Admiral at the Lake Tests Innovative Food Service Robot
- 5 | Musician in Residence Program Generates Excitement Among Residents at Barclay Friends
- 7 | Enso Village Officially Breaks Ground on New Community in California
- 13 | Kendal-Crosslands Communities Implements New and Exciting Initiatives
- 15 | Lathrop Cultivates its Outdoor Spaces
- 17 | The Kendal Corporation Launches Quantum GPO

### 2021 ANNUAL REPORT CONTENTS

**Board Chair and President and CEO Messages**  
**Kendal System Finances**  
**A Culture of Generosity**

**2-3 Community Benefit**  
**20-25 Kendal Leadership**  
**26-27 Boards, Addresses**

**30**  
**31**  
**32**



## From the Chair of the Board

### A renewed and refreshed mindset inspires our work

The Kendal System entered 2021 with a renewed sense of determination. After weathering the toughest storms of the pandemic, residents, members, staff and leaders of the Kendal System looked ahead with a refreshed mindset. Vaccinations against COVID-19 were available to all, new innovations were coming into play and the Kendal System marched forward into the new year with its sight set on growth.

Over the course of the year, we witnessed impressive displays of growth across the Kendal System from coast to coast. The sense of collective progress was abundant as affiliates used their expertise and creativity to enhance the communities they served. Responding

proactively to the challenges posed by the ongoing pandemic remained a top priority, but we did not let these hurdles dampen our efforts or divert us from our goals. Instead, we charged forward and are proud of what we as a System were able to accomplish.

We bound together as one Kendal community to mobilize for efforts that impact the people who are central to our mission. We fundraised for the Alzheimer's Association, bringing sharp focus to a disease that so deeply changes the lives of older adults and their loved ones. We advocated for voters' rights, supporting Kendal staff, members and residents who would be negatively affected by legislation that challenged these rights. At Kendal communities, residents and staff came together and supported causes and individuals close to home, reminding us of the power of partnership and integrity.

We grew firmer in our position as leaders in the field of senior living and aging services. We expanded Kendal's innovative CCRC-at-home model into new territories. We stayed at the forefront of technology and adopted solutions that improve experiences for residents and staff members. These efforts, paired with the expertise of Kendal and community leaders, helped keep Kendal on its forward trajectory.

We nurtured innovative ideas and ushered them into fruition. In 2021 we broke ground on a first-of-its-kind senior living community, communities created initiatives to support and engage residents and staff, and we launched

bold projects that increased efficiencies in our business operations. While the world around us evolved, we kept pace and continued to think of new ways to enhance aspects of the Kendal System in support of our mission.

This year, we together have achieved wonderful things for which we are proud. Along with the Values and Practices that guide us each day, it is through unity, knowledge and imagination that we have been able to meet success. And though the work is not done, we are inspired by the work that was done in 2021 to cultivate communities that are inclusive and collaborative and that support older adults as they build fulfilling lives as they age.

Annetha Hall, Chair  
Board of Directors, The Kendal Corporation



## From the President and CEO

### Unity, Knowledge and Imagination

It has been said that a positive attitude aligned with a vision for something better, even in the most uncertain times, can not only be fortifying, but an accelerant toward a better way.

Kendal saw 2021 with degrees of optimism, born in part from confidence built in the prior year and buoyed by the countless stories of good work, inspiration, gentle bravery, kindness and aspiration. As COVID-19 vaccines rolled out, members and friends of

the Kendal family found strength, connection and an affirmation that we would all move on, with vigor, to impact a world where people might see the best in each person and where a heightened understanding for what is actually possible — for every person as they age — would prevail.

The incredible experiences forged over the last two years actually expanded the aperture on our collective lens, causing us to see even more. As we spent countless days, weeks and months apart, we found ourselves craving (and appreciating!) the idea of TRUE community even more. While we watched the world stand at odds over nearly every issue, we saw beauty, wisdom and some inspiration in our differences. We wondered aloud about what we might do together in this world to change the perceptions around aging and transform how people experience aging. We considered how we might shine a bright light on the values that have underpinned Kendal for nearly fifty years and fortified so many thousands of people enlightened to infinite possibility.

There is much to be done in our work, both with one another and in this accelerated world in which we live. Kendal's commitments

to community, equality, integrity and the notion of continuous revelation are components of our foundation. We empower ourselves with these values to imagine things that could be better. We give ourselves the room to recognize that each pitfall, each disagreement, each problem and each disappointment can be endured and built upon if we always seek to understand and believe that within each person there is something that can shine light on a brighter way forward.

The stories in this booklet speak to our condition, but more importantly they clear a path for more: connection, learning, kindness, wonder, purpose and impact.

Best,

A stylized, handwritten signature in black ink, appearing to read 'Sean Kelly'.

Sean Kelly  
President and CEO  
The Kendal Corporation



## THE ADMIRAL AT THE LAKE

## Tests Innovative Food Service Robot

The Admiral at the Lake implemented a food service robot to increase efficiencies and enhance dining service in the community's two dining venues. The "Servi" robot, created by Bear Robotics, is a three-tier food runner that handles such tasks as food delivery and bussing of tables. Instead of taking trips to and from the kitchen to deliver and clear food, this imaginative technology allows employees more time to remain in the dining area to tend to guests.

The Servi is being used in The Admiral's Bistro and Waterfront fine dining room. The robot can hold up to 66 pounds and has a battery life of eight to 12 hours. Since it first rolled out, the Servi has been traveling around one mile per dinner service and is capable of making 20 deliveries per night, letting The Admiral's dining staff spend more time attending to guests, ensuring residents' needs are met. The Admiral's residents, in turn, enjoy a higher quality dining experience.

"At Kendal we constantly seek creative solutions to further transform the experience of aging while maintaining a person-centered approach," said Ben Butler, Kendal's former Vice President for Culinary Services and Procurement and current Vice President of Development. "This robot food runner saves staff time and energy while allowing more time spent attending to residents as they dine."

At The Admiral, leaders are confident the

Servi will provide overall benefits as it can increase efficiency, reduce turnover and costs and increase residents' satisfaction. The team has already noticed the residents enjoying the community's latest technology.

"We have had an overwhelmingly positive response from the residents," said Dan Burns, Director of Culinary Services at The Admiral at the Lake. "The residents have noticed a difference in the service they receive, with more attentive and efficient staff paired with our friendly robot. They put their imaginations to work to even help us decide on a name for our Servi and one of them even went as far as to write the robot its own limerick. It's been a joy to see residents enjoying our newest helper and our staff delivering an even higher level of service."







## Musician in Residence Program Creates Excitement Among Residents

### BARCLAY FRIENDS

Barclay Friends is one of the latest communities to host a Musician in Residence, an imaginative program that allows local music students the opportunity to live at the campus and treat residents to regular musical performances.

Chanin Jung, an international student from Korea enrolled in a graduate school program at West Chester University, was selected to be this year's Musician in Residence at Barclay Friends and performed regularly as a solo violinist. She also accompanied residents who play the piano. Toward the end of her program, Chanin brought the West Chester University Graduate

Quintet to the Barclay Friends campus to play a charming concert, mixing contemporary, modern, classical and patriotic music. Their musical offerings ranged from contemporary composer Brian Crain's "Butterfly Waltz," to John Denver's "Take Me Home, Country Roads," to a beautiful version of the early 19th century German composer Carl Maria von Weber's "Clarinet Quintet in B-flat Major." The afternoon program was capped off by a stirring rendition of Katharine Lee Bates' and Samuel A. Ward's "America the Beautiful."

The concert was performed for 25 residents and team members from Barclay Friends' Cotter Skilled Nursing neighborhood.





*Team Member John Fofana with Joyce Koch (l) and Eloise Branche (r), both resident members of the Scholarship Committee.*

## COLLINGTON

# Establishes John Fofana Memorial Scholarship

On November 14, 2021, one of Collington's most beloved employees tragically passed away. John Fofana was one of the most cherished team members ever to be part of the Collington community. Born in Sierra Leone November 1, 1995, the last child of Frank Fofana and Lavinia Mccauley, he and his father came to the United States after he had graduated from high school, and shortly afterward he joined the Collington team.

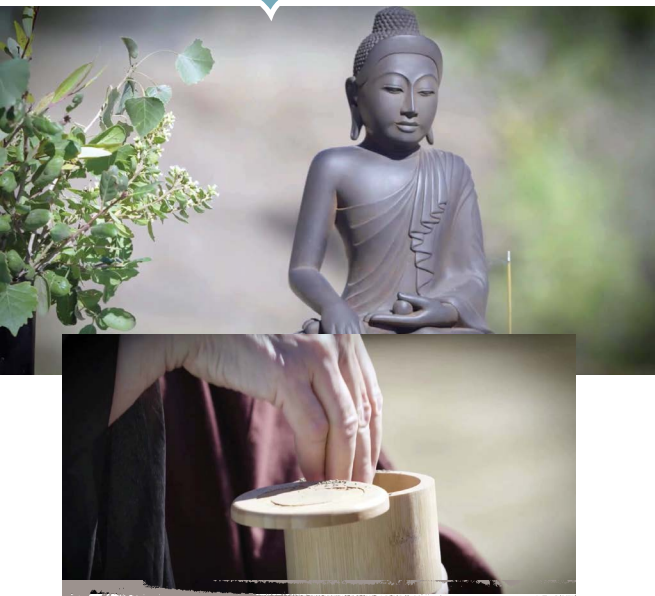
John Fofana was a valued member who spent eight years as part of the Culinary Services Department, where he was promoted twice due to his drive and dedication to improving the lives of residents and fellow team members at Collington. John was an avid learner, who took advantage of many of Collington's existing scholarship opportunities to complete his associate degree and work toward his bachelor's degree in preparation for a career in public service. John would have graduated December 2021 with a bachelor's degree in criminal justice.

In light of this tragedy, the

Collington Foundation chose to honor John by establishing the John Fofana Memorial Scholarship Fund to benefit Collington team members pursuing their education who also emulate John's drive and vision to help others. Since his passing in 2021, the John Fofana Memorial Scholarship Fund has raised nearly \$43,000. The funds collected include a \$15,000 match contribution from the Collington Foundation to start the scholarship. This memorial scholarship is being established as a "current use" fund, which will make a significant difference to recipients over the next few years with the first John Fofana Scholarship to be awarded in fall 2022.

"John was not only a much-loved team member, but he was also a young man with educational and professional goals, an inspiration for his fellow team members," added Bonnie Cronin, Chair of the Collington Foundation. "The Foundation Board felt that establishing a scholarship in his memory would give us all a way to honor him while helping other team members achieve their goals."





## ENSO VILLAGE Officially Breaks Ground on New Community in California

In October, Enso Village co-sponsors San Francisco Zen Center and The Kendal Corporation, together with City Mayor Evelyn Mitchell and City Manager Jeff Kay, virtually welcomed approximately 200 guests during a special “Ground Blessing” ceremony. The ceremony celebrated the official start of construction for Kendal’s newest Zen-inspired community in Healdsburg, California, Enso Village.

Unlike a traditional ground-breaking with ceremonial silver shovels and turning of soil, the Ground Blessing event was meant to bless and thank the ground on which the new Enso Village will eventually rest. As part of the ceremony — led by Susan O’Connell, Spiritual Director of Enso Village, and Linda Ruth Cutts, Senior Dharma Teacher for the San Francisco Zen Center — guests who joined virtually received a special box with soil from the property. They were invited to place the soil in the box to symbolically interact with and touch the earth during the blessing, and then place the box in a special place in their current home.

When complete, Enso Village will be comprised of 221 residences for

older adults on approximately 16 acres of land located in the North Village, a mixed-use project that includes housing, retail, restaurants and more. The community will also boast a large, onsite, vegetarian restaurant, a demonstration kitchen, indoor pool and gym, meditation hall, onsite farm for growing fresh produce for the restaurant and much more.

Steve Bailey, Senior Vice President of Development for The Kendal Corporation, remarked, “Enso Village is the project of a lifetime, but not for the obvious reasons. This partnership between two values-driven organizations, San Francisco Zen Center and Kendal, has demonstrated the importance of *how* we do our work, not just of *what* we accomplish. How we live and how we behave in support of a vision that is larger than ourselves is just as important as the end results.”

Enso Village will be the first-of-its-kind community in the United States blending Kendal’s Quaker values with the mindfulness of the San Francisco Zen Center. The new community is slated for completion in 2023.

## KENDAL AT HANOVER

## Residents and Staff Discuss 'How to Be an Antiracist'

Amid renewed energy for the fight for racial justice and social equality, residents of Kendal at Hanover opened avenues for conversations so that members of the community could engage with each other to deepen their understanding of the current concerns and challenges surrounding racism.

The Diversity, Equity, Inclusion and Belonging Committee at Kendal at Hanover worked to outline steps the community could take to become better informed in the Black Lives Matter movement and to better understand and confront racism. Residents on the Committee developed and shared with the wider community a list of suggested

films that could help provide perspectives of racial problems and invited community members to read Ibram X. Kendi's book *How to Be an Antiracist*. The book discusses concepts of racism and Kendi's proposals for anti-racist individual actions and systemic changes.

Members of the Kendal at Hanover community were then invited to come together to discuss what they had read and what they had learned. During this open and relaxed session, the discussion touched on many of the themes

in Ibram Kendi's book. Residents and staff members expressed genuine concern and interest around how our upbringing informs our ideas and behaviors. The group also reflected on how the aging process has helped individuals become better listeners and think more clearly about prejudices.

Kendal at Hanover's residents agreed how important it was to continue the conversation on race in order to establish a more

inclusive and equitable campus and community at large. Despite the challenges, Kendal at Hanover knows that open collaboration can lead to progress, and they look forward to future opportunities to continue making actionable change in the realm of diversity, equity, inclusion and belonging, together.





## KENDAL AT HOME Expands Service Area

Kendal at Home unveiled plans to expand its lifecare at home offerings, sizably expanding its footprint following its strong history of growth and expertise in this model of senior living and aging services. For older adults whose best and most desired option is to remain at home, Kendal at Home provides members the resources and services to help them age in place while retaining their autonomy, dignity and peace of mind.

The announced expansion revealed plans for Kendal at Home to grow its membership base in Massachusetts and to begin serving residents in Kentucky, bringing the states in which Kendal at Home operates to three.

“Our presence in Massachusetts and Ohio was built both organically and through coordinated efforts over the years. As we have become more ingrained in these regions and more knowledgeable of the needs of older adults in these states, we understand how best to serve this population in these areas. We are thrilled to welcome more members within Massachusetts and in Ohio’s neighboring state of Kentucky,” said Lynne Giacobbe, CEO of Kendal at Home.

Kendal at Home first entered the Massachusetts market through a partnership with Lathrop Communities in Easthampton to provide personal health and wellness services to residents in need of those supportive services. It then branched out to serve members in the surrounding Western Massachusetts area. The expansion plans laid the groundwork to grow its operations from Western Massachusetts eastward into the Boston metropolitan area.

In the Midwest, Kendal at Home has been serving members in the Cleveland, Ohio, area for nearly two decades. It steadily gained more traction throughout the state of Ohio toward the southern region of the state over its years of dedicated service. This pace of growth and the enthusiastic membership base helped generate interest right across Ohio state lines in Northern Kentucky.

These plans for growth shepherd in an exciting period for Kendal at Home as it further cements its status as a leader in the “CCRC without walls” model of senior living and home-based services for older adults.



## KENDAL AT ITHACA

## Celebrating 25 Years with COVID Accommodations

As Kendal at Ithaca's 25th anniversary drew closer, residents wanted to commemorate the momentous occasion while maintaining the health and safety of the community during the pandemic.

Deciding to celebrate throughout 2021, residents kicked off with a review of Kendal's history and a mostly virtual champagne toast at the beginning of the Anniversary Year.

Various committees planned celebrations and many pivoted to outdoor venues. A presentation of "How We Became a Kendal and not a Marriott" revealed how The Kendal Corporation and not Marriott International, Inc. came to develop the Ithaca community. Marriott shied away from the project because there was no existing regulation for CCRCs in New York State. However, Kendal was keen to assist in the development of them and the community.

The third installment in the *History of Kendal* book series debuted, representing the years from 2010–20 with a spotlight on the Repositioning Project. This \$40M renovation and expansion project added 24 more apartments, 13 more skilled nursing rooms, a new dining venue and expanded fitness areas. Other spaces were redecorated to the project's design themes.

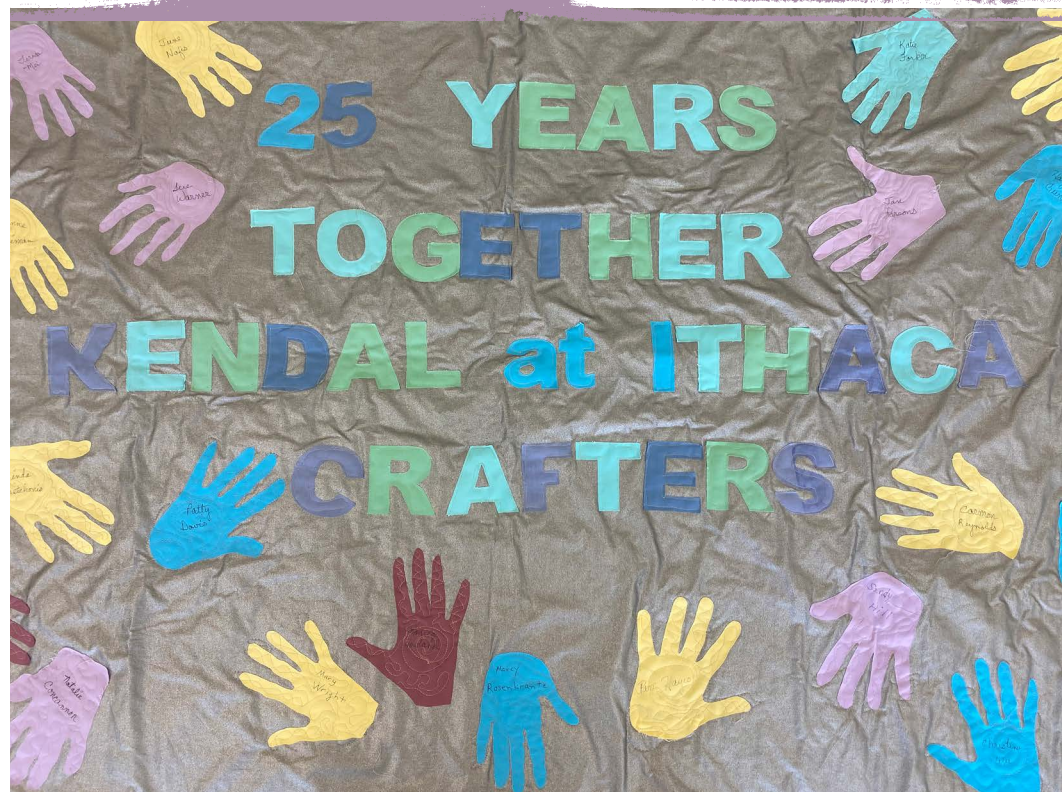
Events over the summer were

designed to be celebrated with music. The Cayuga Chamber Orchestra Brass Quintet presented a lively and uplifting program. A local band entertained with a six-piece band playing blues, swing, Latin, rock and a little bit of country, with some dancing included. More concerts and festivities followed with performances by The Fall Creek Band in July, Four Guys and a Gal in August and The Tarps in September.

One highlight of the Resident Committee was the creation of a celebration quilt. The quilt was created by the sewing and conversations group, which

included all users of the craft room. Taking the theme of using one's hands to create, the quilt features the handprints of all the participants' quilted onto a silver background with the names embroidered on them. The quilt was presented at a community town meeting and hangs prominently at the south entrance to the building.

While the 25th anniversary celebrations weren't quite what Kendal at Ithaca initially planned, residents and staff created moments of joy and things to look forward to throughout the year, bringing the community together to celebrate their rich history and bright future.





## KENDAL AT LEXINGTON

# New Air Quality Technology Helps Residents Stay Safe

Lexington constantly works to ensure the best living and health and wellness experiences for residents. Finding positive solutions to address COVID-19 concerns is no exception. Through diligent research and information gathering, as well as tapping into the knowledge and expertise of the community's staff members and the fields of senior living and other large organizations, new air quality technology has been added across Kendal at Lexington's campus.

According to Kendal at Lexington's Director of Operations, Herbie Martin, installation of two air quality systems was completed over the summer of 2021. The addition of an ultraviolet (UV) lighting disinfecting system and Phenomenal Aire, an air purifying and cleaning system, wrapped in August 2021.

**Technology and Improvements You Can't See** — UV light technology isn't new according to Herbie, but has become increasingly used by schools, hospitals, restaurants and residential communities such as Kendal at Lexington. It's been proven that UV light can sanitize air and equipment by killing off mold, viruses, airborne fungi and bacteria up to 97%.

These lights are placed within the existing HVAC ductwork. Since moisture accumulates within the system, dust, dirt, allergens and the harmful particles collect on coils that can then be recirculated in the air. The UV lights shine directly onto the coils, keeping the coils and resulting air output cleaner.

The Phenomenal Aire system, developed by Trane, is similar to the air quality technology used in other closed spaces such as airplanes. Positioned in the supply ducts of the HVAC unit, a plasma field kills off mold spores, viruses and bacteria as air passes through.

**Enhanced Air Handling and Safety in All Common Areas** — Both UV lights and Phenomenal Aire systems now protect common areas and community spaces across campus. The systems were added to all HVAC units in the common areas of the Borden Health Center, Webster Assisted Living Center, the Anderson Residential Living main dining area, Kendal Hall, hallways and the



fitness center. Individual apartments will also benefit since they are all connected via the hallways, which are part of the common area ventilation.

Meeting rooms, hallways, dining rooms and other areas with heavy traffic and activity now have the added safety of the enhanced ventilation systems.

The UV technology is available on a residential scale, and while there is no immediate plan to add this to cottages, residents in the cottages can add it, if desired, and some already have.

**Keeping an Eye on New Tech** — Residents do not see or feel anything different; however, maintenance and technicians will be alerted to the UV and Phenomenal Aire systems with labels and other safety measures. In the duct work where the UV lights are installed, there are now inspection lenses so they can be viewed while still protecting the person looking at them. Staff members of the Operations Department will interpret forthcoming data on how the systems perform, and how efficient and effective the improvements are, especially how it contributes to the longevity of the equipment.

As other filtration options and improvements emerge, Kendal at Lexington will continue to research and consider what works best for residents and the areas in which they live. "We want to stay informed of advancements that can safeguard residents, staff and guests," Herbie added.

## KENDAL AT OBERLIN

# Technology Enhances Resident and Community Engagement

Kendal at Oberlin has worked to incorporate technology into its day-to-day operations since its inception, but the community ramped up its offerings during the pandemic to keep residents safe, informed and engaged. This renewed prioritization of technology is now formalized into the community's overall goals as it became a key component of Oberlin's newly adopted five-year strategic plan.

The strategic plan was adopted in late 2021 and includes a continued focus on increasing the role of technology. Other goals developed to strengthen the community include objectives to expand its market footprint, become a more competitive employer, grow sustainability initiatives, and maintain its commitment to diversity, equity, inclusion and belonging. The creation of the strategic plan was a yearlong effort and involved nearly 300 people, including board members, staff, residents and the larger community. They participated in surveys, focus groups, one-on-one interviews and in-person meetings to promote a sense of personal ownership of the process and the resulting strategic plan.

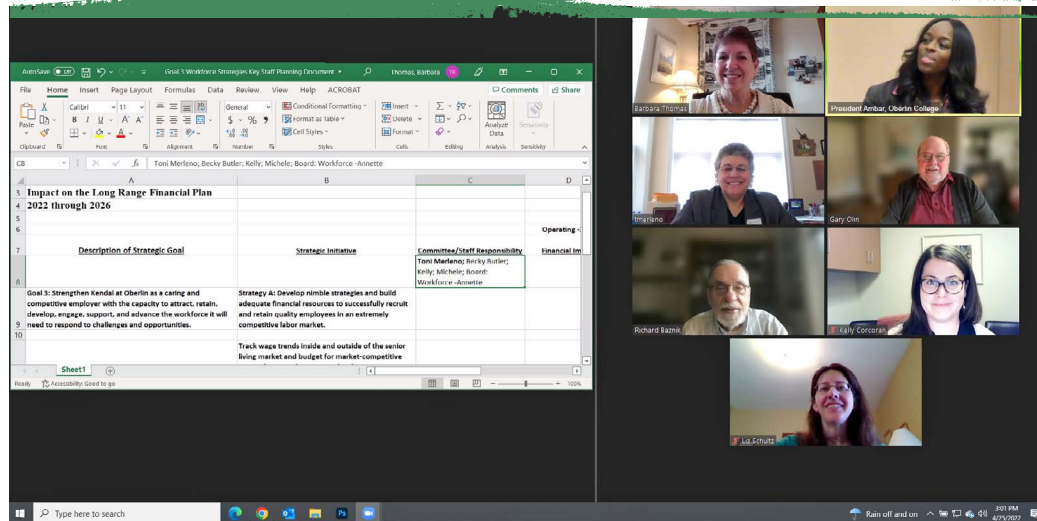
During the year and leading up to the adoption of the strategic plan, the focus on technology was in motion.

The Joint Technology Committee — comprised of residents and staff — completed an extensive review and selected Viibrant, a new resident engagement software, to replace the existing Kendal at Oberlin resident website. The website has been in development and testing through much of 2021 and will include such features as an inventory of the arboretum and art collections, all programs scheduled, bios of residents, service forms and more.

Kendal at Oberlin's cable TV channel offerings were expanded. For years, residents have relied on WKAO for daily menus, activities and news. Now residents have two more channels to watch — KOTV and WSCC. Programming on KOTV and WSCC, which is not continuous, includes recorded exercise classes, lectures, movies and Zoom meetings. The third channel, WSCC,

focuses on programming for Stephens Care Center residents, but all can tune into any of the three channels.

In addition to the new programming, Kendal at Oberlin also helped educate residents through another source. Kendal at Oberlin typically hosts students from Oberlin College, who are paid using federal work-study funds, to work at the community and provide music therapy and other programming. When the world turned upside down, Kendal at Oberlin was able to rethink the



*Kendal at Oberlin's effort to engage many constituents for their planning utilized a variety of media, including Zoom.*

roles of the students who could no longer visit the community in-person.

Four students, using YouTube and Zoom, created online classes for residents. The classes were picked up by Linked Senior, a company that provides life enrichment and dementia engagement software and was shared with other older adult living communities. The most sought-after classes were a weekly Spanish class, a 30-minute yoga meditation class and an interactive spelling bee competition.

With a refreshed emphasis on technology with the implementation of the strategic plan, along with the innovations adopted throughout the year in 2021, Kendal at Oberlin aims to maintain this technologic momentum for the betterment of the future of the community.





## KENDAL-CROSSLANDS COMMUNITIES Implements New and Exciting Initiatives

Kendal-Crosslands Communities has put some new and exciting projects into action this year, with the help of residents and staff.

Residents at Kendal at Longwood created a hydroponics lab that provides a year-round space to grow healthy and nutritious produce while raising awareness of climate change, conservation, energy efficiency and sustainable development. The effort has proven beneficial in several ways. The Culinary Services Department at the Longwood campus uses the hydroponically grown vegetables in meals and the lab is one of many initiatives Longwood takes to reduce their carbon footprint. The hydroponic garden is an innovative component of Kendal-Crosslands Communities' green initiatives and serves as another example of how residents value the campuses' sustainability efforts.

Another new eco-friendly feature of Kendal-Crosslands Communities are the new homes on campus. Kendal-Crosslands Communities broke ground on eight new cottages and an apartment building featuring ten residences. The new homes will be high-performance buildings that meet the U.S. Department of Energy's zero-energy ready standards focusing on building envelopes, insulation, high-efficiency equipment and highlighted by roof-mounted solar panels.

The community also sought to reward staff members through creative programs. In addition to the current perks of working at Kendal-Crosslands Communities, including meals, flexible schedules and making lifelong friends in a welcoming work environment, the community wanted to show further appreciation for dedicated staff members. Kendal-

Crossland Communities created a tuition assistance program that will allow employees currently in high school to earn up to \$1,200 per year toward their future education in college or trade school. This program is in addition to their traditional tuition assistance program for staff members already enrolled in higher education.

"These initiatives showcase our commitment to residents, staff and the wider community. At the heart of these efforts, we are investing in our people so we can transform the experience of aging for all," said Lisa Marsilio, CEO of Kendal-Crosslands Communities. "I am so proud of everyone at the community for thinking outside the box with ideas and bringing these ideas to life."

These three programs have shown how a little ingenuity can engage current residents and staff.



KENDAL ON HUDSON

## Partners with Hearts and Homes for Refugees

Kendal on Hudson recently welcomed a young adult refugee from Burma to live among residents in their community. Kendal on Hudson partnered with Hearts and Homes for Refugees, a non-profit organization that works with the U.S. Department of State to house refugees, to facilitate the refugee's temporary move to the campus until they find a permanent home in the area.

The female refugee arrived earlier this year and was welcomed by resident ambassadors from the community, who were very helpful in making their new neighbor comfortable and at home. Hearts and Homes has worked since 2006 to resettle refugees in the Lower Hudson Valley. This is the first time the organization has collaborated with a senior living

community to provide housing for a refugee.

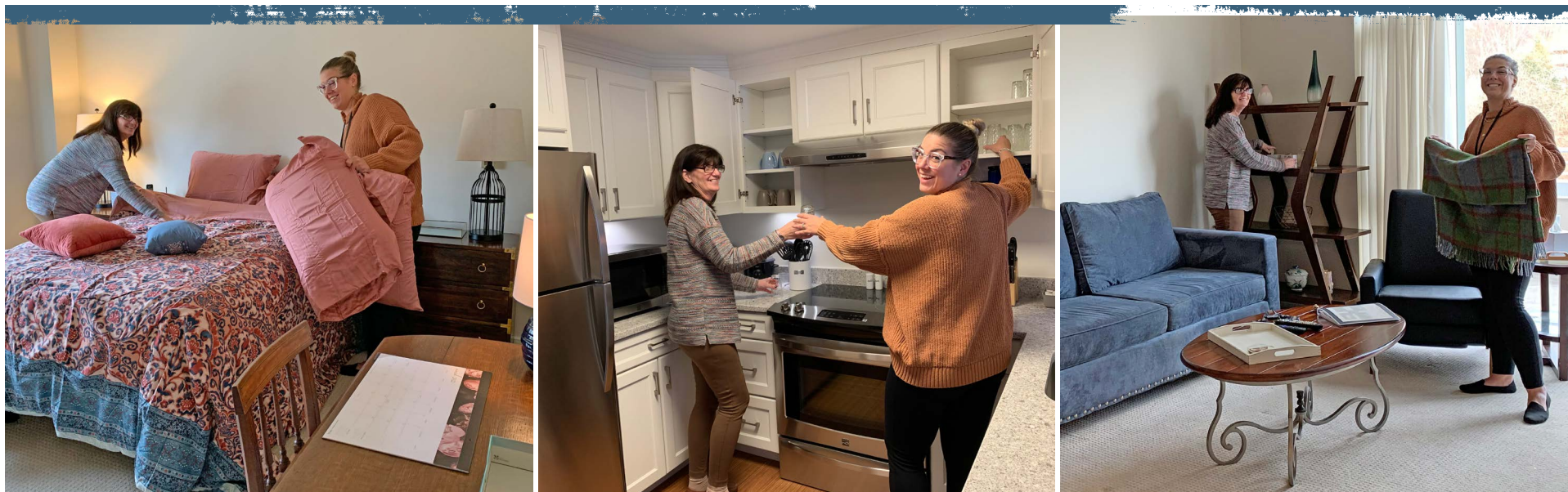
"We are so happy to have had this opportunity to support someone in need," said Pamela Klapproth, CEO of Kendal on Hudson. "At Kendal, we are committed to fostering community and serving as a welcoming presence for all people. Partnering with Hearts and Homes on this effort to resettle a person in Westchester County aligns with who we are and with our core Kendal values."

Other local organizations also played a part in helping the new resident adjust to their relocation. Local companies assisted in moving and donating furniture.

"It has been so great to work with Kendal on Hudson and other community partners to do our

part in addressing the global refugee crisis," said Kathie O'Callaghan, President and Founder at Hearts and Homes for Refugees. "It is always a rewarding experience to see communities come together to provide aid to people they don't know, especially when it is in our own county."

This is not the first time Kendal on Hudson has worked to help refugees. The community previously partnered with Ossining for Refugees, a local organization that helps new neighbors get settled in their communities, to hire a refugee in the Dining Services Department. Through this genuine partnership and unity, Kendal on Hudson is doing its part to empower its community and serve as a welcoming presence.







## LATHROP Cultivates its Outdoor Spaces

With limitations on gatherings in indoor spaces at Lathrop Communities, the outdoors offered a rich resource for unity, knowledge and imagination. Residents and management worked together to enjoy and tend to both of Lathrop's campuses, designating 2021 as the Year of the Land.

The walking paths across campus were reinvigorated and reimagined as Lathrop's meeting spaces. One resident in her nineties was inspired to walk 100 miles, and, by doing a little each day, she reached her goal. Residents on one campus instituted a weekly time to walk through the lanes together, combining conversation, exercise and dog walking.

As residents again began venturing out onto Lathrop's four miles of trails, residents could imagine the built campuses and the undeveloped land as one ecological system that supports the bluebirds, butterflies, bobcats, foxes, turtles and bears that cross Lathrop's streets and inhabit its wilder land. Residents of Lathrop set out to further enrich this shared ecosystem. They labeled native plants along the trails and placed 78 acres of beautiful meadows, forests, streams and vernal pools into Conservation Restriction, bringing the total to 104 protected acres. Residents enjoyed nine new bluebird houses and delighted in watching the beavers.

The Land Conservation Committee distributed information about how alien invasive plants may crowd out native plants, reducing wildlife by up to 75%. Resident gardeners removed invasives like pachysandra and installed native plants. Out in the forests, the committee continued its eight-year, grant-supported project to remove invasive plants, reaching a new total of 80 acres.

Residents worked with management to reduce pesticides, plant trees and find alternatives to mowed grass, which supports almost no wildlife. Residents on one lane replaced an area of mowed grass with a bird and pollinator sanctuary. They purchased 91 native shrubs, dug holes, planted the shrubs and then celebrated outdoors. On another lane, residents re-imagined a central raised berm, creating a level gathering place with benches and native plants for birds and pollinators. In the community gardens, with new garden sheds, fences and raised beds, residents grew tomatoes, squash and beans, sharing their bounty with other residents and the common dining room.

While some of the emphasis on the outdoors was spurred by the challenges of the year, Lathrop continues to be dedicated to finding new and fresh ways to connect the community with nature.



## THE KENDAL SYSTEM Participates in United Effort to Support Alzheimer's Support and Research

The Kendal Corporation and affiliates across the System participated in events in their communities for the Alzheimer's Association Walk to End Alzheimer's in a unified effort to draw attention to and help move the needle on finding a cure for Alzheimer's disease. The events welcomed participants who support the cause or walked in memory of or for someone who has been affected by Alzheimer's disease.

**The Kendal Corporation** — The "Kendal Cares" team participated in the Walk to End Alzheimer's in Wilmington, Delaware on Saturday, October 23. The Kendal Cares team raised \$3,900 to benefit the Alzheimer's Association.

**Kendal-Crosslands Communities** — Kendal-Crosslands Communities also participated in the Wilmington Walk to End Alzheimer's and was a Silver Sponsor for the event. The Wilmington Walk and all its participants helped raise a total of \$187,087 that will support the Alzheimer's Association in their research efforts.

**Kendal at Oberlin** — The community held a Walk to End Alzheimer's on its campus on Saturday, September 18. Kendal at Oberlin chose to host the walk on campus due to a rise of COVID-19 cases in the area. In attendance, 29 staff members and 16 residents walked the Oberlin campus in support of Alzheimer's treatment and research, raising \$700 to benefit the Association. Kendal at Oberlin was also a Check-In Sponsor for the larger Lorain County Walk to End Alzheimer's event.

**Kendal at Hanover** — Kendal at Hanover participated in the Walk to End Alzheimer's on Saturday, October 2, in Hanover, New Hampshire. The Kendal at Hanover team raised \$8,565 to benefit the Alzheimer's Association. Kendal at



Hanover was a Fight Sponsor for the event, which raised a total of \$130,053 from participants in the Upper Valley, Vermont/New Hampshire area.

**Kendal on Hudson** — This year, Kendal on Hudson hosted the annual Alzheimer's walk on their campus on Sunday, October 3. Kendal on Hudson also was a Partner Sponsor for the Hudson Valley Chapter of the Alzheimer's Association event at Westchester Community College on the same date. Over 60 participants comprised of staff members and residents gathered and walked around campus to raise awareness for the disease. In addition, the event provided games, puzzles and snacks for walkers, and a prize to the team that completed the most laps around campus. Kendal on Hudson donated a total of \$8,246 to their local Alzheimer's Association chapter.

In total, the Kendal System's combined efforts raised over \$20,000 for Alzheimer's support and research while displaying the power that our collaborative spirit can provide in improving the health outlook of older adults.





## THE KENDAL CORPORATION Launches Quantum GPO

The COVID-19 pandemic brought several challenges, among them supply chain disruptions that led to the inability for many senior living organizations to obtain the goods and products they needed. When this challenge arose, The Kendal Corporation met it with an innovative approach. To improve the overall purchasing practices at Kendal and guarantee that all Kendal affiliates will have the resources they need to enhance the experience of aging at this moment and in the future, The Kendal Corporation launched its own group purchasing organization (GPO) named Quantum.

Quantum, like other GPOs that group purchase and leverage that power to negotiate with distributors, was created to simplify and improve operations while saving money for each Kendal affiliate. Quantum negotiates contracts with suppliers

that leverage the purchasing power of the Kendal System to provide savings and price stability to affiliates so they may focus on residents, members, staff and their local needs.

"The Kendal Corporation is focused on supporting and creating value for each affiliate so that they can continue to serve residents and members at the highest standard," added Sarah Moore, Director of Procurement. "Quantum streamlines the purchasing process for Kendal and will benefit the system in the long term so that we may concentrate on fostering transformative experiences for residents and members of Kendal affiliates."

Through collaborative thinking in the Kendal System's operational areas, Quantum has delivered immediate benefits to affiliates while providing a sense of security if supply chain disruptions continue.

**QUANTUM**<sup>SM</sup>  
SIMPLIFYING PROCUREMENT





## THE KENDAL CORPORATION Announces Alliance for Voters' Rights

This year, The Kendal Corporation announced the brand-new Alliance for Voters' Rights. As an organization upheld by our Values and Practices, Kendal believes we have the responsibility to serve as change agents for social equality and a better world. In line with these values and our legacy as a Quaker organization, The Kendal Corporation felt it necessary to act and form the Alliance for Voters' Rights.

The Alliance unites the older adult residents and staff of Kendal communities through the common belief that the right for citizens to cast their votes is a core tenet of our democratic republic. Though still in its early stages, and with more work to be done, the Alliance for Voters' Rights established its commitment to

voter equality and supporting those who have been marginalized by restrictive voting laws.

As part of the Alliance and as leaders among aging-services providers, The Kendal Corporation adopted a set of principles that have and will continue to guide our goal to support voters' rights. By accommodating residents and colleagues so they may freely vote; supporting marginalized businesses, organizations and causes; mobilizing the many voices within the Kendal System; and advocating with others across the aging-services field, the unified Kendal System can make actionable change for the greater good.



NORA ADELMANN

## Leaves Legacy Upon Retirement

After more than four decades of steadfast service to The Kendal Corporation, Nora Adelmann, Senior Vice President for Governance and Strategy, retired in early May 2022.

Nora started her career with Kendal as Assistant to the Executive Director at Kendal at Longwood/Crosslands. Since then, Nora elevated to new roles ultimately becoming a key executive leader whose experience and knowledge in the senior living field have greatly contributed to the organization's success and helped lead Kendal to where it is today.

Outside of Kendal, Nora has been committed to improving the field of senior living and aging services through her involvement in other organizations, including LeadingAge PA (then the Pennsylvania Association of Nonprofit Homes for the Aging), serving as Chapter President and Education Committee Chair. On the state level, she served as PANPHA Board member and Education Committee Chair.

Nora has a deep affinity for charitable giving stemming from her personal upbringing and illustrated through her external community service. This same dedication to good citizenship is seen through her ardent support of Kendal Charitable Funds' Promising Innovations Program. This program provides grants from the Lloyd Lewis Fund to advance services and programs that serve older adults throughout the United States. Throughout her career, Nora has believed that Kendal's mission extends beyond the system and has the capacity to impact all older adults. With this in mind, Nora's retirement request was for the continuous support of KCF so that Kendal may continue to positively influence the field of aging.

Kendal is honored to have had a dedicated colleague who holds our shared mission and culture close to her heart. As Nora embarks on this new journey of a well-deserved retirement, she looks back at her time at Kendal with joy and pride in her storied career and for what we all have built and continue to cultivate together.



# System Finances

**The Kendal System**, founded in 1971, consists of not-for-profit senior-living programs, communities, 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 12 operating affiliates throughout the country (when it opens, Enso Village will be the 13th Affiliate). Each Kendal affiliate is an independent 501(c)(3) organization with its own board of directors and close ties to the local community. In the federal-style model, The Kendal Corporation is a supporting organization and 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** spent much of 2021 focusing on efficiency, growth and innovation in its service to the supported organizations. The first IT Strategic Plan and Roadmap was developed, aligning the work of our technology professionals with the business goals and needs of The Kendal Corporation and the Kendal System. To further enhance our ability to deliver on the mission of *"Together, transforming the experience of aging."*, The Kendal Corporation sold its office building located on the campus of Kendal-Crosslands Communities back to that organization and is in the process of moving to the University of Delaware STAR Campus in Newark, Delaware.

The pandemic continues to impact revenue and results, with postponement or cancellation of market research, consulting and development work.

One affiliate struggled through the pandemic and continues to defer the Kendal System Fee, which is the primary support of The Kendal Corporation. To partially offset these losses, The Kendal Corporation applied for and received a Paycheck Protection Program loan in 2020 to maintain all staff positions and services at pre-pandemic levels. The loan was forgiven in 2021.

The work around securing PPE early in the pandemic resulted in the creation of Quantum, a Kendal-led procurement initiative that enables us to better support affiliated organizations 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 about 720 employees, insuring nearly 1,200 lives during 2021. The plan ended the year with \$3,846,000 in reserves on hand, with about \$315,000 being "excess reserves." By consensus of the participating affiliates, those 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 because of careful asset management and an aggressive funding strategy, we were able to record a decrease in the pension benefit liability of nearly \$15,200,000, with the plan being fully funded on an aggregate basis as of December 31. We have expanded Kendal-sponsored retirement benefits to include 403(b), 401(a), and 457 retirement savings plans to help attract and retain qualified talent and provide stable retirement options for our employees. The Kendal-sponsored retirement plans have a combined market value of just over \$200,000,000 and provides benefits for over 4,450 participants.

—Amy Harrison, Chief Financial Officer

**THE ADMIRAL AT THE LAKE** continued its operational excellence by achieving a net operating margin of 15% during 2021, putting the community in approximately

the 85th percentile of all CARF-accredited communities. The COVID-19 global pandemic resulted in The Admiral incurring approximately \$140,000 of pandemic-related expenses in 2021. To offset these costs and costs that were incurred in the prior year, The Admiral received approximately \$250,000 of federal relief funds. The Admiral came in ahead of budget on sales and entrance fees paid in the 2021 year. The Admiral continued to invest in its employee education program and provided just under \$49,000 in tuition assistance to 26 employees. Finally, The Admiral, in conjunction with The Admiral at the Lake Foundation, was able to provide approximately \$418,000 in financial assistance to residents in need during 2021.

—R.J. Zielinski, Chief Financial Officer

**BARCLAY FRIENDS** — Despite the on-going challenges of the last two years, the financial position of Barclay Friends remained strong in 2021. Barclay's net asset position increased by \$1.2 million to \$35.5 million, which included \$2.7 million of paycheck protection and provider relief funds, and positive interest and investment rate returns. Loans provided by the Paycheck Protection Program are expected to be fully forgiven this year. Unrestricted cash and investments totaled nearly \$23 million with debt just over \$21 million. Working capital is over \$4 million and Days Cash on Hand averaged 575 days.

Occupancy rebounded from pandemic lows, with the long-term care wings in Cotter skilled nursing full and a continued steady demand for short stay rehabilitation beds from local referring hospital partners. The Preston building, which opened during the pandemic in 2020, has experienced a gradual fill-up, with the secure memory care wing filling with a waiting list, and personal care and residential living continuing to welcome new residents. Preston expects to hit stabilized occupancy by mid-year 2022.

—Jennie Bury, Director of Finance

**COLLINGTON** continued to thrive amidst post-pandemic inflation and staffing challenges in 2021. Collington's 2020 Paycheck Protection loan of \$2,469,000 was forgiven in the spring of 2021. End of year debt service coverage ratio came in at 1.97%;



Days Cash on Hand at 252 and a net operating margin of 8.10%. Collington focused on investing in campus infrastructure in 2021 and plans to continue this effort in 2022 and forward. Collington stayed focused on its 2018-2023 Strategic Plan pillars of Health & Wellness, Engagement, Stewardship and Partnerships. Under the Health & Wellness pillar, Collington increased team member COVID vaccination rate from 60% in January 2021 to 96% by November 2021. The Community Engagement pillar included significant improvements to our employee benefits plans and a 91% employee retention rate, as well as the development of a new onboarding program for our six new board members and four new foundation board members. The Stewardship pillar provided 32 units sold for the year, an upgraded auditorium sound system and maintained occupancy of above 90%. Collington established new partnerships with the UMD Regional Health System and Prince George's County Community College. The Collington Foundation, a supporting organization, invested in the mission of Collington by funding \$26,331 in scholarships for employees and providing over \$142,000 in support for residents with financial hardship. In 2021, the Collington Foundation received over \$215,000 in donations.

—Courtney Corcoran, Chief Financial Officer

**KENDAL-CROSSLANDS COMMUNITIES** had another year of strong positive results, with an excess of revenues over expenses of approximately \$5.25 million, driven primarily by realized gains of approximately \$3.37 million and net unrealized gains on equity securities of approximately \$2 million for 2021. Net assets increased to approximately \$107 million in the same period. Kendal-Crosslands Communities has maintained a strong cash and investment position relative to debt obligations, with \$119.5 million in unrestricted cash and investments, compared to just over \$46 million in long-term obligations and more than 902 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 2021.

—Edward Plasha, Director of Finance

**KENDAL AT HANOVER** had income from operations

during FY 2021 of approximately \$2,226,000, compared to \$663,639 that was recognized from FY 2020. Income from operations in FY 2021 was augmented by the full forgiveness of \$2,154,520 in Paycheck Protection Program funds. These funds were received by our community in FY 2020 through Kendal at Hanover's participation in the COVID-19 federal economic relief program known as the CARES Act and became a liability on our balance sheet in FY 2020 in recognition of the fact that these funds could be a long-term loan for Kendal at Hanover. In June of FY 2021 the U.S. Small Business Administration forgave these funds in full and they were removed from our liabilities and recognized as revenue.

During FY 2021, Kendal at Hanover recognized a strong investment portfolio market with non-operating gains of nearly \$4,750,500 and contributions without donor restrictions of approximately \$406,000. The average residential occupancy for Kendal at Hanover for Fiscal Year 2021 was 95.05%, while the average occupancy for Assisted Living – Level 1 was 75.29%, Assisted Living – Level 2 was 88.60%, and the Whittier assisted living (our memory care unit) generating an overall occupancy of 91.69%. The lower occupancy with our assisted living units was directly impacted by the expansion and the continued 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 \$34.7 million, is scheduled for completion on May 10, 2022.

Kendal at Hanover continues to maintain a "BBB+ stable" investment grade rating through Fitch Ratings due to its steady financial performance, strong market position, steady and consistent entrance fee receipts, and Days Cash on Hand ratio that ended FY 2021 at 990 days.

Of further note, Kendal at Hanover once again earned the A.V. Powell & Associates exemplary recognition seal for its Actuarial Compilation Report for the period ending December 31, 2021.

—Brent Edgerton, Associate Executive Director/CFO

**KENDAL AT HOME** — 2021 was a year of tremendous growth for the Kendal at Home program; growth we have

been planning for and investing in for the last five years.

Following an in-depth market study, we invested in an extensive marketing effort to support our new business launch into Massachusetts and re-launch in our existing markets. Along with a fresh message, we revised our contract offering to better support older adults planning for their second acts. The new contracts are separated into tiers allowing members to better customize their benefits regardless of their geographic location or other long term care plans in place.

The continued concern for safety during the pandemic kept our sales seminars virtual. Our message successfully reached many in all markets. We added 34 new members, 13 of which are in the greater Boston area of our expanded Massachusetts market. Kendal at Home now serves 356 members in nine states.

Kendal at Home's staff grew 33%, adding six new positions supporting operations in two states. Our dedicated staff embraces a hybrid work model creatively using technology to support members, operations and each other.

Kendal at Home was the recipient of a generous grant to support and grow our virtual programming which now has weekly offerings of education, entertainment, exercise and an eclectic mix of speakers. Matched by a technology gift from a board member, Kendal at Home was able to create an in-house studio used to elevate the quality of programming.

Along with our own investment, the 2021 growth was supported by a loan from the Kendal Corporation Growth Fund. —Karen Graham, Chief Financial Officer

**KENDAL AT ITHACA** — Despite the persistent challenges of the pandemic, Kendal at Ithaca's 2021 operating and financial performance was again very impressive. During FY 2021 approximately \$750k of COVID-related expenses were incurred to help protect the health and safety of residents and staff. Notably, there have been no resident deaths from COVID-19 during the entirety of the pandemic. Although the organization has navigated through the pandemic with limited CARES Act support and no use

of the Paycheck Protection Program, net assets have grown by over \$3.0 million during the past two years. During this time Kendal at Ithaca's occupancy and census has remained very stable. Independent living (IL) occupancy finished FY 2021 at 88%, up from 87% in FY 2020. Health Center occupancy averaged 91%, with skilled nursing nearly 95%. During 2021, Kendal at Ithaca saw significant improvement in several key financial indicators. A strong fourth quarter of entrance fee collections helped grow Days Cash on Hand to a very healthy 799 days. The Debt Service Coverage ratio jumped dramatically from 2.20 to 3.81 at year end. Seeing IL occupancy trending toward 90% and cash reserves steadily growing, S&P Global Ratings affirmed Kendal at Ithaca's credit rating of "BBB+" with a stable outlook. Its strong balance sheet and favorable credit rating placed Kendal at Ithaca in a position to successfully refinance nearly \$12 million of its outstanding long-term debt in the first quarter of 2022, lowering future debt service and achieving present value savings of \$2.3 million.

—Gregory Sommers, Chief Financial Officer

**KENDAL AT LEXINGTON** Kendal at Lexington was able to move forward and thrive even with the continuation of the pandemic in 2021. All Phase III interior renovation work was completed in the health centers and the main dining room was opened again to residents. Average residential living census was 95.1% with net residential services revenue of \$8.8 million. Occupancy improved in the Webster Assisted Living Center to 70% with revenue increasing by 17.1% from the previous year. The Borden Health Center experienced the largest decline with average occupancy for 2021 of 61.7%, with only 48 of the 60 beds available for admission due to staffing challenges. Revenue decreased by 11.7% from 2020.

Total operating revenue for the community increased \$1.76 million (8.6%) from the prior year primarily due to the forgiveness of the Paycheck Protection Program loan of \$1.369 million. Revenue also included \$465,000 in Provider Relief Funds. Total expenses for the year of \$17,999,000 increased by less than \$100,000 from 2020 with COVID-19 related

expenses of \$318,000, 88.6% were attributable to testing.

In addition, Kendal at Lexington received restricted contributions of \$234,000 which included \$50,000 for staff and leadership training. The contribution was a direct result of the community initiative to focus on staff retention, recruitment, culture change and education. Another Strategic Plan initiative in 2021 was the stabilization of our IT infrastructure and the creation of a technology steering committee to ensure that technology enhancements remain a focus both from an operating perspective and capital improvements.

Kendal at Lexington welcomed 18 new residents in 2021 with total entry fees of \$4.8 million. Excess of revenue over expenses was \$4.2 million while total net assets increased by \$4.5 million. At year-end Days Cash on Hand was 877 days and the Debt Service Coverage Ratio was 3.26. Kendal at Lexington reaffirmed its Fitch "BBB-" stable rating.

In the fall of 2021, Kendal at Lexington embarked on a master land use plan which will be used as a guide for the entire property in 2022 and many years beyond.

—Felicia Bush, Chief Financial Officer

**KENDAL AT OBERLIN** 2021 began with the promise of transitioning to Kendal at Oberlin's "new normal" and the phased re-opening of the campus community throughout the year. There were significant financial accomplishments that occurred during 2021 that are highlighted below:

- The Payroll Protection Program ("PPP") loan was forgiven in the early part of 2021 (\$1.7 million) which had a significant favorable impact on operations and Kendal at Oberlin's operating margin.
- Refinancing the 2013 A bonds with bank debt utilizing two financial institutions, one being a local community bank, resulted in lowering our cost of capital with an estimated savings of \$3 million over the remaining life of the debt.
- Fitch Rating Agency was selected to provide a rating on Kendal at Oberlin and resulted in an upgrade to an "A+" rating with a stable outlook.
- Workforce challenges continued to be addressed through significant wage adjustments, enhanced

employee benefits, and expanded recruitment strategies to increase qualified candidates and reduce time from application to hire date.

- Ongoing evaluation of the investment portfolio with a focus on enhancements to Kendal at Oberlin's ESG investing and rebalancing of the portfolio to address ongoing changes in the Investment markets. This resulted in \$1.9 million of realized gains and approximately \$4.0 million of unrealized gains from the investment portfolio.
- Significant investments continue to be made in technology with the introduction of a new Point of Sale system to support the rollout of the new Dining Services meal plan options.
- Staff and residents partnered in an extensive process to evaluate and select a new resident portal/website for enhanced resident engagement and ease of access for services and information.
- A new portal was created for Priority Members to support virtual engagement for prospective residents with the Kendal at Oberlin community using technology.
- Work continued on the Strategic Plan and the Master Planning process with a significant amount of collaboration and input among board, residents and staff.
- Kendal at Oberlin exercised its "Right of First Refusal" on an affordable housing complex located next to Kendal at Oberlin's campus. Kendal at Oberlin utilized Kendal Northern Ohio to support this purchase as part of its outreach arm to the greater community. This was a strategic investment that supports Kendal's vision to expand its mission to serve a broader market demographic and maintain affordable housing in the City of Oberlin.

Although the pandemic continued throughout 2021, Kendal at Oberlin was determined to create an environment that supports resident safety with the ability to transition the community back to the "new normal" and to enrich the lives of the residents through engagement and input from residents, board, staff and the wider community.

—Ann M. O'Malley, Chief Financial Officer



**KENDAL NORTHERN OHIO** is the outreach arm of Kendal at Oberlin to promote intergenerational activities and develop innovative services to older adults which complement those of existing organizations. The following accomplishments have been highlighted for Kendal Northern Ohio:

Supported two community entities as the Fiscal Agent that included:

1. The OberlinKids Collaborative, focused on supporting young children and families in the Oberlin area to educational readiness from birth to school age children.
2. The Oberlin Community Land Trust, which is seeking "to strengthen diversity and grow communities by holding land in trust for permanently affordable, sustainable housing, home ownership, and other community needs."
  - Kendal Northern Ohio with financial support from Kendal at Oberlin was able to purchase an affordable housing complex located next to Kendal at Oberlin's campus. This was a strategic investment that supports Kendal's vision to expand its mission to serve a broader market demographic and maintain affordable housing in the City of Oberlin.
  - Continued participation in a special membership agreement with another nonprofit organization to support home health services for residents of Kendal at Oberlin, Lorain County and certain zip codes in Cuyahoga County.
  - Ongoing development of a community outreach plan that is focused on supporting healthy aging and access to health care, transportation needs in Lorain County and housing needs in the City of Oberlin.

The purchase of the affordable housing complex allows Kendal Northern Ohio to establish a balance sheet to support future outreach goals on behalf of Kendal at Oberlin.

—Ann M. O'Malley, Chief Financial Officer

**KENDAL ON HUDSON** ended 2021 in strong financial condition with 95% occupancy in Independent Living, 989 Days Cash on Hand and a Debt Service Coverage Ratio of 3.27x. There were 28 move-ins for the year, generating net entrance fee proceeds of approximately \$16.5 million. Total revenue for the 12 months ended December 31, 2021 approximated \$36.2 million and includes approximately \$2.1 million related to Paycheck Protection Program loan forgiveness and approximately \$350,000 related to Provider Relief Funds. Occupancy in assisted living and memory care rebounded from the impact of COVID-19 and was 88% and 85%, respectively, as of December 31, 2021. Skilled nursing occupancy rebounded during the year as well and was impacted slightly by the omicron variant at the end of the year. Total operating expenses for the 12 months ended December 31, 2021 approximated \$33.8 million, an increase of 3% compared to 2020. Kendal on Hudson is in compliance with all debt covenants at the end of the year.

—Jean Eccelston, Chief Financial Office

The **LATHROP** Community performed significantly better than budget in 2021. Our occupancy levels have remained high with our townhomes at 97% occupancy and the Inn apartments at 93%. As a result, our revenue exceeded the budget by about 1%. We restructured our leadership team which resulted in significantly less payroll expense. In addition, we were able to meet the front-line staffing challenges with a generous retention and recruitment adjustment for hourly staff. Our achieved operating margin was 9.7% for the year as opposed to the budgeted 5.6% which assisted in the increase in cash of \$470,995 while simultaneously investing close to \$700,000 in our properties and paying off in excess of \$360,000 in bank debt. We have adopted a five-year plan with the goal of increasing cash reserves and intention to build on the success of 2021 through continued focus on growing revenue and reducing expenses.

—Holly Smith-Bové, Chief Financial Office

# The Kendal Corporation Condensed Financial Information

beginning 1/1/21 and ending 12/31/21

## BALANCE SHEET

Assets	
Cash and Investments	5,392,095
Receivable from Affiliates and Intercompany	2,460,702
Other Assets	<u>22,747,567</u>
Total Assets	<u>\$30,600,364</u>
Total Liabilities	9,348,750
Without Donor Restrictions	19,416,528
With Donor Restrictions	1,835,086
Total Net Assets	21,251,614
Total Liabilities and Net Assets	<u>\$30,600,364</u>

## Statement of Operations

Operating Revenue	
System Fees from Affiliates	8,486,946
Development Fees	1,816,225
Investment and Other Income	<u>1,519,474</u>
Total Operating Revenue	11,822,645
Expenses	10,297,186
Operating Gain (Loss)	1,525,459
Non Operating Revenue	
Reserve Fee from Affiliates	260,778
Realized Gains (Losses) on Investments	882,148
Change in Defined Benefit Pension Plan	15,199,889
Unrealized Gains (Losses) on Investments	<u>193,334</u>
Loss on Disposal of Assets	(395,593)
Increase (Decrease) in Unrestricted Net Assets	<u>\$17,666,015</u>

# Kendal Operating Affiliates Selected Financial Information

Fiscal year ending	The Admiral at the Lake 12/31/21	Collington 12/31/21	Kendal at Hanover 12/31/21	Kendal at Ithaca 12/31/21	Kendal at Lexington 12/31/21	Kendal at Oberlin 12/31/21
<b>Total Assets</b>	<u>\$147,764,124</u>	<u>\$86,284,958</u>	<u>\$202,821,277</u>	<u>\$114,291,883</u>	<u>\$110,623,438</u>	<u>\$128,343,682</u>
<b>Total Liabilities</b>	281,413,661	114,287,992	138,712,579	100,573,438	93,134,898	65,791,604
<b>Net Assets</b>						
<b>Without Donor Restrictions</b>	(145,295,786)	(33,068,991)	51,074,108	11,838,140	15,397,271	56,216,038
<b>With Donor Restrictions</b>	11,646,249	5,065,957	13,034,590	1,880,305	2,091,269	6,336,040
<b>Total Net Assets</b>	(133,649,537)	(28,003,034)	64,108,698	13,718,445	17,488,540	62,552,078
<b>Total Liabilities and Net Assets</b>	<u>\$147,764,124</u>	<u>\$86,284,958</u>	<u>\$202,821,277</u>	<u>\$114,291,883</u>	<u>\$110,623,438</u>	<u>\$128,343,682</u>
<b>OPERATING SUMMARY</b>						
<b>Total Income</b>	22,175,585	29,143,164	32,135,027	27,327,303	21,469,988	24,503,196
<b>Total Expense</b>	<u>29,612,061</u>	<u>29,583,540</u>	<u>29,908,755</u>	<u>26,936,631</u>	<u>17,998,644</u>	<u>20,314,957</u>
<b>Gain (Loss) from Operations</b>	(7,436,476)	(440,376)	2,226,272	390,672	3,471,344	4,188,239
<b>Realized Gain (Loss) on Sale of Investments</b>	14,412	537,362	82,767	209,891	888,656	1,903,081
<b>Unrealized Gain (Loss) on Investments</b>	(97,899)	696,352	4,333,443	(880,690)	(187,121)	3,997,322
<b>Change in Value of Interest Rate Swap/Caps</b>	0	0	1,367,773	0	0	170,098
<b>Change in Obligation to Provide Future Services</b>	2,679,207	0	0	0	0	0
<b>Unrestricted Contributions</b>	301,118	239,757	405,961	0	11,789	37,976
<b>Assets Released from Restriction for Capital</b>	0	0	0	8,799	77,239	83,438
<b>Gain (Loss) on Property, Plant and Equipment</b>	0	0	(16,282)	12,055	(4,493)	0
<b>Loss on discontinuation of project</b>	0	0	(1,398,527)	0	0	0
<b>Loss from early retirement of debt</b>	0	0	0	0	0	(859,859)
<b>Other</b>	<u>1,819,112</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
<b>Incr (Decr) in Net Assets without Donor Restrictions</b>	<u>\$(2,720,526)</u>	<u>\$1,033,095</u>	<u>\$7,001,407</u>	<u>\$(259,273)</u>	<u>\$4,257,414</u>	<u>\$9,520,295</u>



Kendal-Crosslands Communities 12/31/21	Kendal on Hudson 12/31/21	Lathrop Communities 12/31/2021	Barclay Friends 12/31/2021	Kendal at Home 12/31/2021	Kendal Northern Ohio 12/31/2021
<u>\$254,475,918</u>	<u>\$201,830,109</u>	<u>\$20,361,385</u>	<u>\$57,772,015</u>	<u>\$7,966,910</u>	<u>\$2,145,604</u>
147,529,922	210,099,827	45,530,963	22,217,930	14,029,718	2,010,668
82,371,109	(8,269,718)	(25,781,306)	32,978,597	(6,122,408)	128,779
24,574,887	0	611,728	2,575,488	59,600	6,157
106,945,996	(8,269,718)	(25,169,578)	35,554,085	(6,062,808)	134,936
<u>\$254,475,918</u>	<u>\$201,830,109</u>	<u>\$20,361,385</u>	<u>\$57,772,015</u>	<u>\$7,966,910</u>	<u>\$2,145,604</u>
58,402,021	36,166,198	6,501,399	16,134,601	5,315,228	188,366
<u>58,636,042</u>	<u>33,804,296</u>	<u>6,998,001</u>	<u>16,462,001</u>	<u>6,472,179</u>	<u>105,067</u>
(234,021)	2,361,902	(496,602)	(327,400)	(1,156,951)	83,299
3,368,609	(248,074)	0	0	173,762	0
4,475,730	221,942	141,801	142,576	407,694	0
108,000	0	0	962,588	0	0
0	0	0	0	0	0
111,681	0	153,326	160,274	7,749	0
0	0	0	497	0	0
0	0	0	0	0	0
0	0	0	0	0	0
0	0	0	0	0	0
<u>(15,175)</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
<u>\$7,814,824</u>	<u>\$2,335,770</u>	<u>\$(201,475)</u>	<u>\$938,535</u>	<u>\$(567,746)</u>	<u>\$83,299</u>



# A Culture of Generosity

***“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.

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 2021**

Resident Assistance	\$41,301,521
Employee Assistance	\$5,544,664
To Benefit Kendal Community	\$25,733,107
To Benefit Wider Community	\$232,401
Expectancies from CGA’s, Unitrusts & Bequests	<u>\$15,147,334</u>
<b>Total</b>	<b>\$87,959,027</b>

## KENDAL CHARITABLE FUNDS

For Kendal Charitable Funds Benefit	\$4,224,530
Expectancies for Affiliate Benefit	\$1,057,472
<b>Total</b>	<b><u>\$5,282,002</u></b>
<b>GRAND TOTAL</b>	<b>\$93,241,029</b>

\* Does not include Chandler Hall and Lathrop.

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.





## Kendal Charitable Funds Concludes Grant Project with Rebuilding Together Philadelphia

In 2020, Kendal Charitable Funds awarded a \$50,000 Promising Innovations grant to Rebuilding Together Philadelphia. The grant was awarded to fund a two-year initiative to help low-income older adults age in place. The Kendal Corporation believes every person, no matter where they reside, has the right to age peacefully and safely with dignity. Kendal Charitable Funds is proud to celebrate the conclusion of the grant project with Rebuilding Together Philadelphia, which has improved the homes of over 130 older adults in the area and will help them stay well as they continue to age.

Rebuilding Together Philadelphia is a chapter of the national nonprofit that provides critical

home repairs, modifications and improvements for vulnerable homeowners residing in urban settings. The group partners with community-based organizations, homeowners and volunteers to repair 125 homes annually to help them stay safe and comfortable in an independent living setting.

Such repairs included those that will prevent falls and injuries, reduce causes of asthma and create sanitary environments. For example, the organization installed bed rails and ensured stairs and ramps have secure handrails to prevent falls. It also worked to improve the overall condition of older adults' homes through measures such as removing old carpeting and patching exterior holes,

addressing plumbing and appliance issues and checking for fire safety.

This collaboration between Kendal Charitable Funds and Rebuilding Together Philadelphia was successful in bringing together professionals and volunteers — including technicians who donated their time, students from trade and technical schools and individuals from the neighborhood — to support vulnerable older adults. Kendal Charitable Funds is proud to have supported this organization through the Promising Innovations grant and to reaffirm how through the power of collaboration we can change how we experience aging.





We believe that a spirit of inclusion and a culture of diversity enrich and strengthen our communities, people and services.

**K**endal strives to create a safe, non-judgmental space for all individuals to be their true self. In alignment with our Quaker roots and Values and Practices, we aim to cultivate an environment of compassion and acceptance, psychological safety, trust and belonging where:

- All differences and uniqueness are recognized and valued
- All individuals are welcomed, respected and treated equitably
- Each individual's unique stories, needs and perspectives are valued and heard
- Every individual has a seat at the table and a voice that is heard
- Every voice can be authentically expressed, and individuals can bring their true self to the table without any cost to their identity
- Individuals feel connected and find affinity with one other

We believe that creating this environment is our shared responsibility and enables our culture to come alive through the lived expression of our values.

View our "Welcome Diversity" video online:  
[vimeo.com/398956103](https://vimeo.com/398956103).

The Kendal System's five Core Pillars provide a foundation for this ongoing work to flourish and evolve.



### Diversity is defined in the broadest sense, including:

- age, gender, gender identity, sexual orientation
- ethnic and racial background, language, country of origin, religious and spiritual values, geographical location
- family status, education, socio-economic status
- cognitive and physical abilities
- seniority, organizational function and background
- any other perceived differences.





**Diversity | Equity | Inclusion | Belonging**  
*Listening, growing and engaging.*

KENDAL SYSTEM DIVERSITY EQUITY INCLUSION & BELONGING COMMITTEE

## DEIB Pillar 1.

### Structural Inclusion

DEIB efforts are integrated throughout all Kendal business operations and are reflected in the makeup of every policy, practice, decision, communication and interaction.

## DEIB Pillar 2.

### Welcoming & Inclusive

Diversity is recognized in the broadest of terms and we look to cultivate environments that welcomes all people and where individuals can be their true self.

## DEIB Pillar 3.

### Non-Judgmental Inquiry

Each person is seen, treated, and valued as a unique individual and we approach each interaction with curiosity, dignity, respect, and seeking to understand without judgment.

## DEIB Pillar 4.

### Open Communication

A sense of integrity and community is prioritized and preserved through clear, direct, respectful and open communication.

## DEIB Pillar 5.

### Sharing Our Mission

Seek to strengthen the field of senior living and aging services as a whole and by sharing our Values and Practices, we hope our experience will benefit others.

# Kendal System 2021 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.

As the world continued to adapt to the challenges posed by the COVID-19 pandemic, The Kendal Corporation staff continued to actively engage with the external community and do their part to give back and provide a bit of relief to those in need amid the uncertainty.

Over the course of the year, staff members from every department within The Kendal Corporation devoted time and energy to community engagement activities big and small, across 11 different program categories. All told, The Kendal Corporation staff contributed over 1,900 hours to community benefit efforts during 2021, assisting neighbors in need and supporting causes that resonate with Kendal’s values.

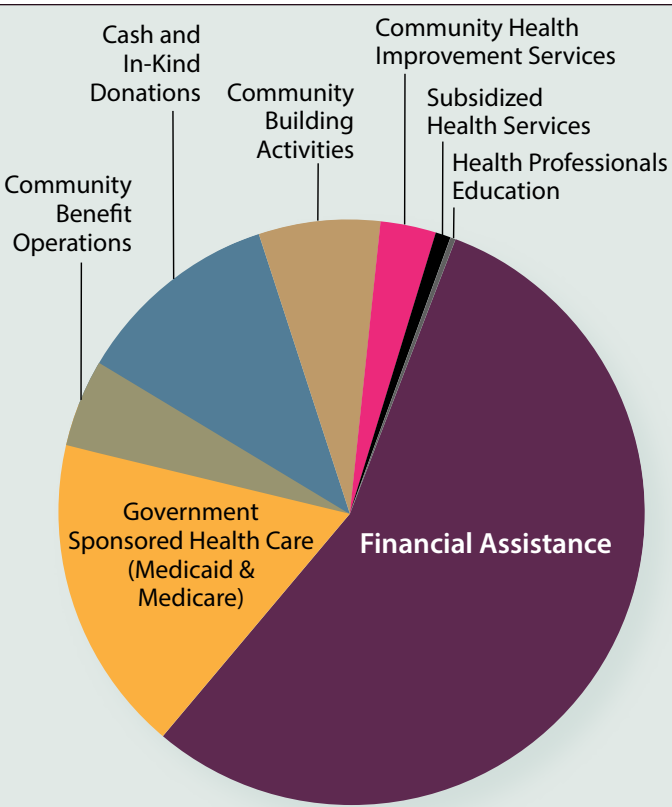
While we collectively were adjusting to our new normal, Kendal staff members still prioritized enhancing the System’s overall community benefit program. Kendal team members sought to increase engagement and nurture the strength of the

programs to spur even greater positive impact in the community.

The Kendal Corporation staff members formed a Social Impact Work Group to expand and evolve staff opportunities to be engaged in community service efforts. The group met frequently to discuss new ways to better serve the wider community, brainstorm ideas to encourage more Kendal team members to get involved and set goals for programming and outcomes.

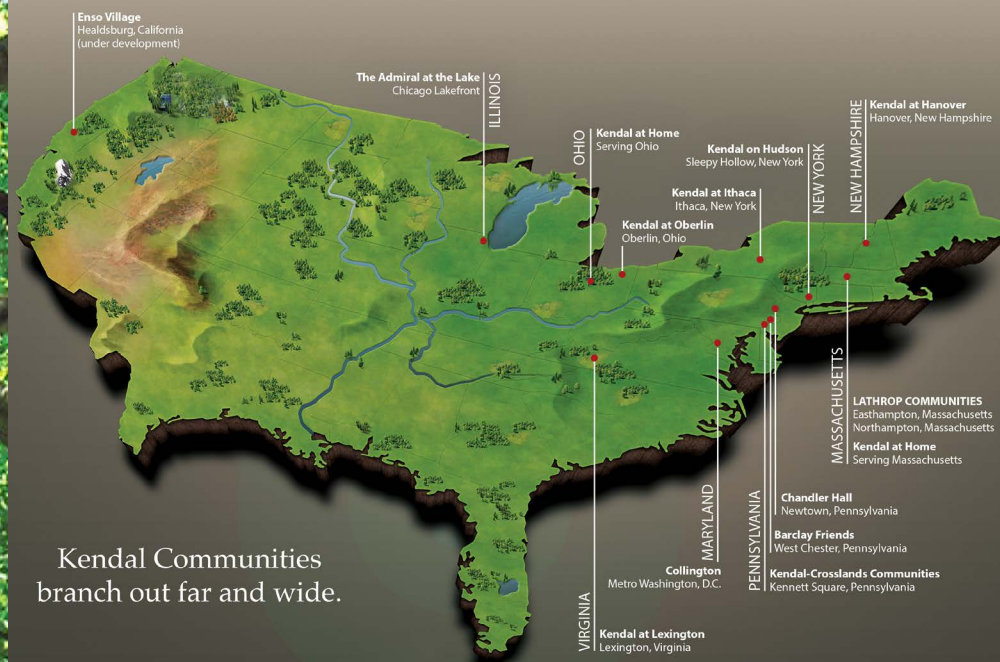
Employees from The Kendal Corporation and two affiliates also participated in the Community Benefit Specialist certificate program. Over the course of six months, they worked on course content material and projects to discover how to more intentionally develop, implement, collect and report on activities that serve their wider communities.

The Kendal Corporation embarked on various charitable efforts to support individuals living in the wider Kennett Square, Pennsylvania community or living in their local community. Kendal led several donation drives to collect goods for those in need in the area, including school supplies for students at The Garage Community and Youth Center, over 160 pounds worth of food items for the Kennett Area Community Service Food Cupboard and warm socks and blankets for those experiencing homelessness. For each of these donation drives, The Kendal Corporation purchased items to kick off the event and staff members added to the collections through personal donations.



COMMUNITY BENEFIT CATEGORIES NET BENEFIT	Persons Served	Benefit
Community Health Improvement Services	1,665	\$33,140
Health Professions Education	75	\$983
Subsidized Health Services	46	\$10,585
Cash and In-Kind Donations	8,602	\$213,671
Community Building Activities	453	\$150,558
Community Benefit Operations	0	\$71,822
Financial Assistance	4	\$2,762,835
Government Sponsored Health Care (Medicaid & Medicare)	5,080	\$596,262
Totals — Including Financial Assistance & Medicaid	15,925	\$3,839,856





Kendal Communities  
branch out far and wide.

# Kendal Leadership

## THE KENDAL CORPORATION

Sean Kelly, *President and Chief Executive Officer*  
Nora Adelmann, *Senior Vice President, Governance*  
Stephen G. Bailey, *Senior Vice President, New Business & Development*  
Crystal Baker, *Controller*  
Howard Braxton, *Vice President, Sales & Marketing*  
Ben Butler, *Vice President, Special Projects*  
Cara Cassner, *Director, Digital Marketing*  
Kim Dunn, *Director, Talent and Employee Engagement*  
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, *Vice President, Marketing & Communications*  
Eva Kaeten, *Director, Executive Services, Office of the President*  
Ted Kirkpatrick, *Director, Analytics & Performance Improvement*  
Frank Mandy, *Vice President, Development*  
Diane Massey, *Director, Outreach and 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*  
John Whitman, *Chandler Hall*  
Ann E. Gillespie, *Collington*  
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*  
Cindy Jerome, *Lathrop Communities*

## RESIDENTS ASSOCIATION PRESIDENT

Minna Taylor, *The Admiral at the Lake*  
Jane Roberts, *Cartmel*  
Marian Fuchs, *Collington*  
Bill and Marcia DeWitt, *Coniston*  
Jane Roberts, *Crosslands*  
Larry Murdock, *Kendal at Granville*  
Bob Keene, *Kendal at Hanover*  
Maryann Nagro, *Kendal at Ithaca*  
Paul Cormier, *Kendal at Lexington*  
Betty Warner, *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  
Kate Bensen  
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  
Lauren Sivak  
Fred Wackerle

## THE ADMIRAL AT THE LAKE FOUNDATION

Mike Biver  
Jill Doherty  
Renee Duba  
Charles Katzenmeyer  
Gus Noble  
Jordan Shields  
Sarah Shirk  
Carol Stitzer

## BARCLAY FRIENDS

John Braceland  
John Cigler  
Susan Cusack  
Duane Davis  
Matt Davis  
Ellen Gilbert  
Elizabeth Guman  
Sony John  
Angela Lavery  
Ron Madden  
Marianne Pessognelli  
Serita Spadoni  
Nelson Wicas

## COLLINGTON

Alexis Allen-Shorter  
Christal Batey  
Will Carrington  
Peter Cochran  
Linda Ewald  
Peter Fielding  
Elizabeth Gill  
Beverly Goggins  
Michael Lyles  
Karen Marcelle  
Adam Osteryoung  
Greg Niblett  
Norman Prince  
Peter Rheinsteint  
Lori Simon-Rusinowitz  
Susan Walker

## KENDAL AT HANOVER

Nan K. Carroll  
Jennifer Casey  
Lisa Celone  
Tom Corindia  
Judy Csatari  
Robert B. Donin  
Sean M. Gorman  
John L. Harrison Jr.  
Ruth Lappin  
Lisabeth L. Maloney  
Nancy Marion  
Bridget Mudge  
Judson T. Pierson  
Margaret Rightmire  
Michael Urnezis

## KENDAL AT HOME

Heather Ahearn  
Jenny Campbell  
Michael Carlin  
Edna Chun  
Andrew Fauver  
Joseph Haubrich  
Alan Kolp  
Rosa Licea-Mailloux  
Francis Martines  
Allen Mix  
Mary Picken  
Christine Romano  
Colleen Ryan Mallon

## KENDAL AT ITHACA

Johanna Anderson  
Beverly Chin  
William "Bill" D. Crane  
Davina A. Desnoes  
Mary Pat Dolan  
Judith A. Ehren  
Mary Ann Erickson  
George P. Ferrari, Jr.  
Arnon C. Greif  
Jeffrey Layton  
Alan D. Mathios  
Susan H. Murphy  
Stephen Nunley  
Alan Pedersen  
Debra Raupers  
Susan M. Salahshor  
Andrew T. Simkin  
Lucy H. Staley  
Helen D. Talty  
Donald D. Wilson

## KENDAL AT LEXINGTON

James Adams  
Priscilla Baker  
Harlan Beckley  
David Ellington  
David Grizzle  
Randolph Hare  
Robert Huch  
Pamela Luecke  
Bennett Ross  
Christopher Russell  
Karen Russell  
Drewry Sackett  
Bruce Summers  
Natasha Walsh  
Susan Whitsitt  
Linda Wilder

## KENDAL AT OBERLIN

Mary Behm  
Barb Benjamin  
Wuu-Shung Chuang  
Andria Derstine  
Betsy Manderen  
Annette Mclver  
Robert Monchein  
Scott Moore  
Gary Olin

Marianne Riley  
Liz Schultz  
Jack Southworth  
Dominique Stecker  
Dan Storer  
Dan Styer  
Tracy Sutherland  
Grace Tompos  
Carmen Verhosek  
Joan Villarreal

## KENDAL AT SONOMA

Spencer D. Hamrick Jr.  
Paul Kuenstner  
Rob Lippincott  
Gregory W. McClune  
Zesho Susan O'Connell  
William Rosenzweig  
Susan S. Temple

## KENDAL CHARITABLE FUNDS

Alphonse Brown Jr.  
Jenny Campbell  
Barbara Freedman  
James Greenwood  
Jeffrey Harness  
Julie Houpt  
James Ingram  
Marilyn Richards  
Tara Quinn  
Richard Schramm  
Grace Tompos  
Carla Willis

## KENDAL-CROSSLANDS COMMUNITIES

David Grove  
Willard F. Hurd  
Alice Lane-Koerner  
Samira K. Malik  
Freeman Miller  
Claire Mooney  
Sue Renz  
Frederick T. Spackman  
Anthony Stover  
Andrea Taylor  
Jeffrey C. Wise  
Richard E. Wortmann

## KENDAL FOUNDING DIRECTORS

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

## KENDAL NORTHERN OHIO

Carol Bojanowski  
Liz Burgess  
Josephine Jones  
Tangi McCoy  
Bob Monchein  
Carmen Verhosek

## KENDAL ON HUDSON

Jeffrey Brensilver  
Marlene Calman  
Victoria Gearity  
Bernard (Joe) Lillis  
Kyle McGovern  
Barry Morris  
Adriana Murphy  
Ed Napoleon  
Howard Permut  
Caroline Persell  
Howard Smith  
John Sorice  
Lynn Tepper  
Sharon Wexler  
Deb Wood

## LATHROP COMMUNITIES

Martha Borawski  
Karen Clark  
Ruth Constantine  
Jack Devlin  
Lisa Halbert  
Bruce Hawkins  
Bill Hogan  
Larry Hunt  
Charles Johnson  
Sharon Kletzien  
Anne Lanning

Rebecca Starr  
David Stevens  
Peter Van Pelt  
Joan Wofford  
Owen Zaret

## THE KENDAL CORPORATION, KENDAL AGING, KENDAL NEW YORK

Ken Aldridge  
Georgia Anetzberger  
Richard Baznik  
William Benson  
Casey Brower  
Anna Marie Butrie  
Brooke Carroll  
Paul Cooney  
Harold Craft  
Annetha Hall  
J. Harry Hammond  
Ramona Kirwan  
Jodi Leaser  
Robert Lippincott  
Richard Melecki  
George Mesires  
Stanley Pelli  
Margaret Plank  
Beth Rohlfing



# Kendal Addresses

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## BARCLAY FRIENDS

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610-696-5211  
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## CHANDLER HALL

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Newtown, PA 18940  
215-497-0905 • 888-603-1973  
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## COLLINGTON

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Mitchellville, MD 20721  
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## ENSO VILLAGE (UNDER DEVELOPMENT)

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## KENDAL AT OBERLIN

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## KENDAL-CROSSLANDS COMMUNITIES

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## KENDAL ON HUDSON

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## LATHROP COMMUNITIES

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1 Shallowbrook Drive  
Northampton, MA 01060  
  
413-586-0006  
Email: [admissions@lathrop.kendal.org](mailto:admissions@lathrop.kendal.org)

## THE KENDAL CORPORATION

### KENDAL CHARITABLE FUNDS

Future Headquarters — Summer 2022  
University of Delaware STAR Campus  
591 Collaboration Way  
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610-335-1200  
Email: [info@kcorp.kendal.org](mailto:info@kcorp.kendal.org)  
[Kendal.org](http://Kendal.org)



Together, transforming the experience of aging.®

This Annual Report was prepared in direct collaboration with each of our affiliates. Each may be represented differently based on the information provided as well as current initiatives at each unique organization. This Annual Report is a reflection of how our values show up in key initiatives among Kendal affiliates.



## 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 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.



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

Check us out on Facebook at:  
[facebook.com/DiscoverKendal](https://www.facebook.com/DiscoverKendal)

