

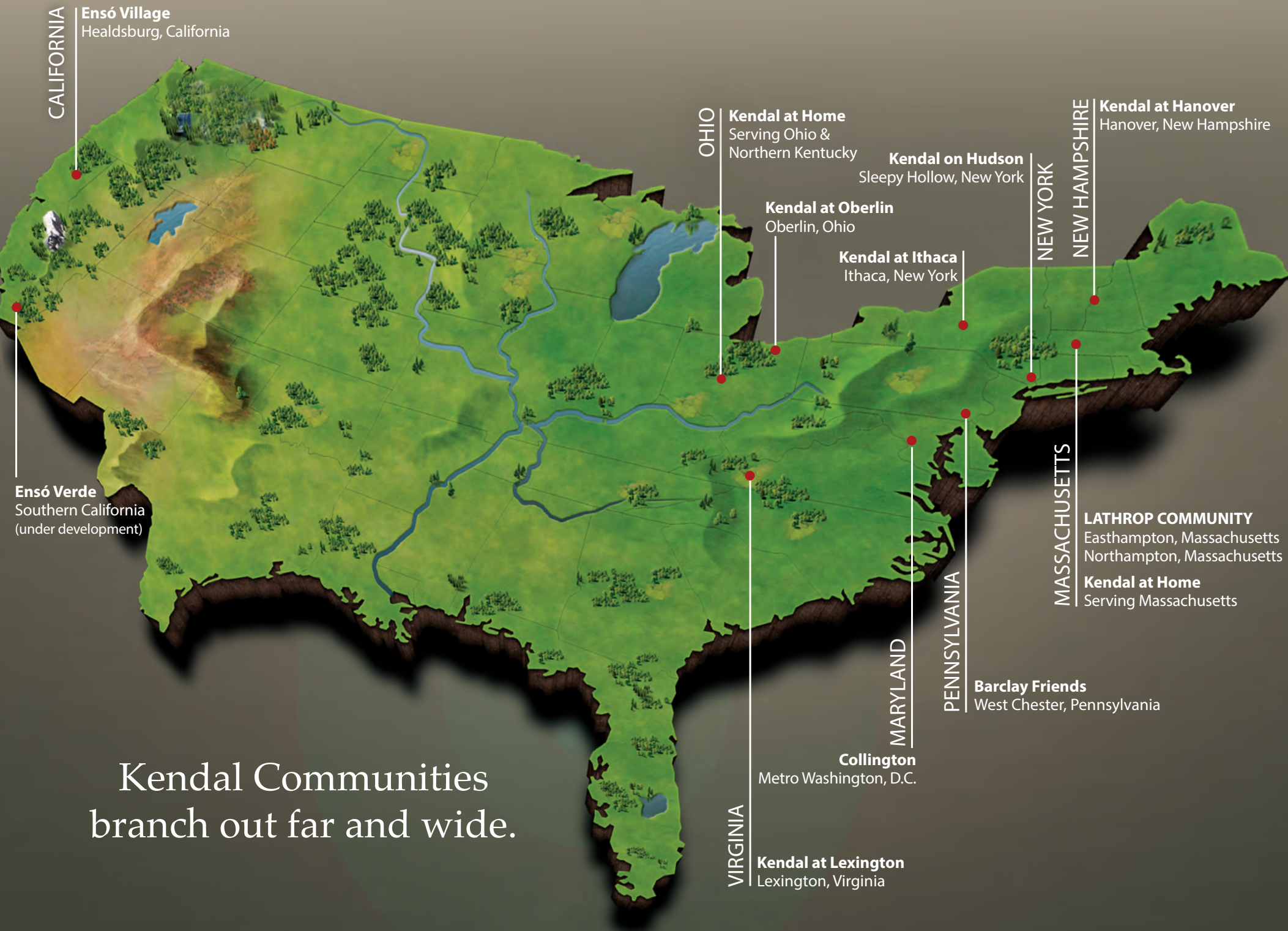
KENDAL[®]

Together, transforming the experience of aging.[®]

A N N U A L
R E P O R T
2 0 2 4

evolving
excellence





Kendal Communities
branch out far and wide.



it starts with an idea



evolving excellence

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Evolving Excellence: Kendal's 2024 Annual Report

Every year, Kendal commits to transparency, reflection, and progress by publishing the Kendal System Annual Report. This collection of stories and aspirations outlines milestones and tells the story of Kendal's collective dedication to older adults and the greater good. Our commitment to the pursuit of 'Evolving Excellence' shines through each page of the 2024 report, offering inspiration and encouragement as we grow into the future.

The report provides many examples of the Kendal System's flexibility, initiative and creative excellence. Across the country, Affiliates are making significant strides in adapting to the changing world while positively impacting the lives of residents, Kendal at Home members, employee teams and the greater community. While each Kendal Affiliate has unique needs that influence their work to maintain a standard of excellence within their community, some core themes emerged in 2023.

Sustainability

The Quaker principles that help guide Kendal are often referred to as SPICES (simplicity, peace, integrity, community, and equality), and naturally extend to environmental stewardship. This philosophy guides Kendal's approach to sustainable living, ensuring eco-friendly practices are woven into daily operations and our strategic vision. Kendal's sustainability initiatives include energy-efficient building designs, comprehensive recycling programs, solar panels that shimmer atop buildings, preserving nature, and more.

This Annual Report highlights Affiliates' deep commitment to

environmental activism and how, together, Kendal is making a significant difference in preserving our planet for future generations.

Nurturing Leadership

The Kendal Annual Report also serves as a tribute to those who have guided Kendal through its storied history and many successes. Readers will be introduced to new leaders whose vision and expertise will shape the future of a System striving for excellence.

These new leaders are poised to sculpt Kendal's pathway to excellence in the coming years. Each brings a unique set of skills, a fresh perspective, and a shared commitment to uphold and extend the values at the heart of the Kendal System.

Strengthening the Mission

Moreover, the 2024 report illustrates how Kendal works to foster a deeper understanding and commitment to the mission and values. Through stories about those we serve and the communities we impact, readers will learn how Kendal champions new ways to promote life-enriching opportunities for people as they age.

Evolving Excellence

The Kendal Annual Report is more than a chronicle of the past year — it's a time to celebrate and move forward. These inspiring stories of 'Evolving Excellence' could not have been achieved without the support and dedication of many employees, residents, members, and community partners.

We hope you enjoy the stories of evolving excellence, where we have adapted, expanded, and enhanced core values to meet the needs of a rapidly changing world. Together, Kendal will continue to evolve and help redefine the possibilities of senior living and the aging services field. Thank you for being a part of this journey.

A handwritten signature in black ink, reading 'Annetha Hall'. The signature is fluid and cursive, with a long, sweeping underline.

Annetha Hall, Chair
Board of Directors,
The Kendal Corporation



A Word from Vassar Byrd

Having just started with Kendal in January 2024, I cannot personally reflect on the accomplishments of 2023 — though there were many. What I do know is that it can be challenging to hold the values and accomplishments of an organization like Kendal in high regard, as I do, while at the same time planning for change and renewal. It is simpler to think of things in terms of all or nothing, but that is never the actual story, is it?

Many things can be true at the same time.

We have a System of dedicated, values-driven people who are focused on creating communities that enrich the lives of the older adults we serve while supporting every employee on the team. We also believe in reaching out beyond the specific community and organization we serve by engaging with the broader communities around us to better the lives of all and create relationships that strengthen and connect us. Kendal has a rich history of person-centered service, innovative partnerships with higher education, strong belief and purposeful action toward greater environmental sustainability, and consensus decision-making that incorporates everyone's voice.

While we uplift and celebrate these achievements and honor our history, we are also working to identify the services of the greatest value to the System and level those up. Our objective is to drill down deep into our expertise rather than spread our focus wide. We will offer the very best to the System in the right way, at the right time, and to the right people.

In an article shared last year regarding the strategic plan effort, Dick Baznik, Chair for The Kendal Corporation's Strategic Planning Taskforce, stated, "If you don't know where you are going, any road will do." Like all organizations today, we are challenged to create and sustain ourselves, to lead and adapt, to build on the strength of our legacy while also looking to the future to create new offerings and evolve our work.

Our strategic planning process started in 2023. It is thoughtful, comprehensive and engaging, involving stakeholders from all parts of the Kendal System — Affiliate CEOs, Board members, and Kendal employees. This will result in a high-level roadmap for the future, outlining the specific steps we need to achieve measurable and meaningful goals. I strongly believe that Kendal's Quaker distinctives will guide us on our path ahead.

The unique setup of the Kendal System allows real opportunities to innovate and adapt to fast-moving economic and social influences through a national network of support and services. There is nothing else like this partnership model and network in our field. We are proud of a System that

captures the lens of every Affiliate, every resident and member, every employee, every Board member, every beautiful outdoor trail and woodland area, every historic building and campus space. In short, the Kendal model reflects every bit of the magic that comes from the thousands of people and experiences that are involved in creating the life we want to live together, every day.

I am blessed to be part of several teams at Kendal. I am a fellow CEO alongside the Affiliate leaders. I am part of the team in Delaware. I am part of The Kendal Corporation Board. These are strong teams that are curious and creative. There are no better people to guide us to the next chapter in Kendal's rich and interesting story.

A handwritten signature in dark ink, reading "Vassar Byrd". The signature is fluid and cursive, with a large, stylized "V" and "B".

Vassar Byrd, CEO
The Kendal Corporation



KENDAL AT OBERLIN

An Evolution in Leadership

Since Kendal at Oberlin opened in 1993, decisions, big and small, have been guided by Quaker values. However, one situation had yet to present itself: hiring a CEO. In early 2023, Barbara Thomas, the community's first and only CEO, announced she would retire. This began a yearlong transition process that put transparency, consensus, inclusion, and other core values to the test.

The Result

"This was a positive step in the life of the community," said Rollin Conway, president of the Kendal at Oberlin Residents' Association (KORA). "This was a strong and inclusive process," said Joan Villarreal, chair of the Kendal at Oberlin Board of Directors, which together, reached a consensus to hire Seth Vilensky as the new CEO.

CEO Transition Team

The yearlong process started with the CEO Transition Team, comprised of Joan, Rollin and ten others. The team represented Boards, residents and employees and reflected diversity in all areas, including but not limited to age, race and gender.

The Team's first challenge was committing to transparency while maintaining appropriate confidentiality. Relying on Quaker values, the group agreed to make Joan and Rollin the public faces of the Team.

The nationwide search was conducted with the CEO Transition Team and the executive search firm Deffett Group guiding the process. Consider these numbers:

- A dozen monthly articles in the Kendalight Newsletter kept the community informed.
- Half a dozen public meetings with KORA Council and residents were held to report out and to hear input.
- A two-day on-site visit with Deffett's leadership was completed, including meetings with a total of 75 residents and staff members representing a range of interests and positions.

Over 40 people applied for the position, and the Team narrowed the field to

four finalists. A special KORA meeting was held in an overflowing auditorium, where residents asked the candidates questions. This meeting was recorded and shared with the candidates before the on-campus interviews.

"This meeting emphasized to candidates how involved residents are. A CEO works collaboratively with residents and employees to provide services for the community. Bottom line: this is the way Kendal at Oberlin works," shared Rollin.

During their Kendal visits, the finalists were interviewed by five different groups representing a cross-section of the community. Four finalists became three, then two. The Team reached a consensus and presented their recommendation to the Board, who, in turn, reached the same conclusion.

Two New Department Directors

As the CEO search was underway, Kendal at Oberlin also had to fill two department head positions. In both cases, promoting from within was the answer.

Lisa Wilken, a 16-year veteran, was named Director of Hospitality Services in November, and 20-year employee Ryan Stalzkowski was named Director of Facility Services in early 2024.



"This was a strong and inclusive process... which, together, reached a consensus to hire Seth Vilensky as the new CEO."

—Joan Villarreal



Seth Vilensky, CEO

Seth's start date, January 29, overlapped with Barbara's last day, February 9, just as the Board had planned. Seth and the Leadership Transition Support Team are working hard to ensure this leadership change is successful for the entire Kendal at Oberlin community.

Joan and Rollin report that feedback from the community continues to be positive, and the successful outcome reinforces that Quaker values and practices remain strong at Kendal at Oberlin.



BARCLAY FRIENDS

Injects Excellence into Every Aspect of Community

At Barclay Friends, staff members live out daily the mission to serve older adults with a focus on compassion and kindness, excellence and continuous improvement.

This year, Barclay Friends embarked on a journey to more explicitly define what it means to provide "excellence" within the community. By focusing on this aspect of the community's mission statement, Barclay Friends aimed to further advance services that enhance the quality of life.

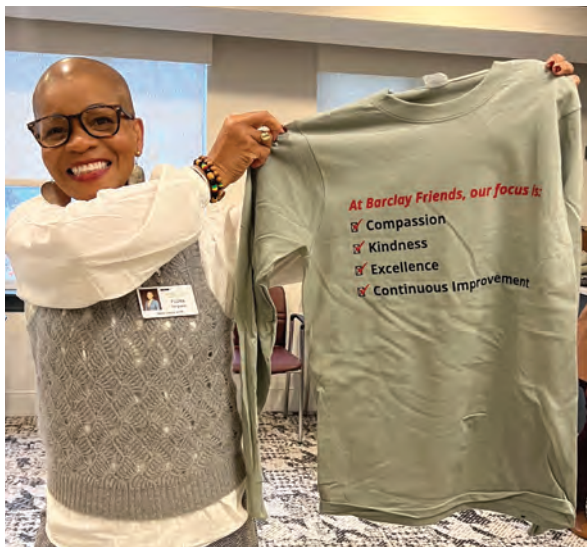
Setting "Excellence" as the Standard

Recognizing that excellence can manifest differently across departments and teams, each director and manager was tasked with defining what excellence means for them and the department they oversee. This inclusive approach ensured that "excellence" was not just a lofty ideal, but a practical guideline rooted in the day-to-day operations of each department and team.

With great thought and care, departments and managers contributed statements outlining how they embody excellence in their daily responsibilities. This process provided the Barclay Friends leadership team with a comprehensive understanding of how excellence permeates

throughout the community's operations.

"Witnessing the Barclay Friends community unite to articulate how they embody excellence in their work was truly inspiring," shared Linda Sterthous,



holding ourselves accountable to reaching this standard, ultimately allowing us to provide enhanced service to older adults."

Demonstrated Commitment

To further demonstrate their commitment to a set standard of excellence, the Barclay Friends leadership team collaborated to identify common themes across departmental statements. This dialogue facilitated alignment and enriched the collective understanding of what excellence is within the Barclay Friends community and Kendal. The final statements were then shared to formally codify the excellence statements as a standard to be met by all team members of Barclay Friends.

At Barclay Friends, "excellence" is more than a description of the type of service that can be found at the community. Team members take the mission to heart and ensure that each pillar of the mission statement is defined and upheld across all facets of the community.

Through this journey, Barclay Friends concluded that "Excellence is showing that we genuinely care about our residents, their families, our team members, and our community partners. We are committed to exceeding their expectations by completing our daily tasks and going above and beyond." This statement is now clearly defined in the mission.

As the campus looks ahead, the team remains committed to evolving, innovating and reaffirming a dedication to providing unparalleled support and services to older adults.

“Excellence is showing that we genuinely care about our residents, their families, our team members, and our community partners.”

—Linda Sterthous



recently retired Executive Director of Barclay Friends. "By committing to a shared meaning of 'excellence', we are

Maria Santangelo, CEO



Honors Two Decades of Community and Connection

This year, Kendal at Home celebrates 20 wonderful years of compassion, innovation and cherished moments. These moments showcase the program's unwavering dedication to its vision of offering whole-person support and services to older adults.

During this time, Kendal at Home has helped hundreds of members remain in their homes and communities and continues to grow. From its beginnings in Ohio, the program has expanded its geographic footprint to two additional states — Kentucky and Massachusetts.

As Kendal at Home reflects on the past, the evolution of the program, and the challenges and milestones reached, it's essential to reflect on the efforts that made this program possible: the essence of the program's values, the dedication of staff, the partnerships in the communities served, and members' dreams that continue to be pursued for the future.

A Trip Down Memory Lane

In 2003, Kendal at Home was founded by Kendal at Oberlin in Ohio for one purpose — to support and grant the wishes of older adults whose best option was to stay at home as they age.

Over the last two decades, the program has experienced remarkable growth including the number of staff members, new Kendal at Home members, and the variety of services provided. Kendal at Home has transitioned from primarily offering coordinated support to now providing a comprehensive model that integrates wellness and other initiatives designed to help members remain independent.

Kendal at Home continues to be moved and inspired by the story of Mary Ann, a charter member who became a symbol of one of the core reasons to keep the company going — meeting the individual and unique needs of members. As her health declined, so did the structure and value of her home. In those challenging moments, Mary Ann became the catalyst for a metamorphic shift, inspiring the organization to develop resources that extended far beyond the boundaries of long-term care.



New Initiatives

Kendal at Home has embraced many new initiatives, including the use of technology, increased partnerships with providers of care and new programming.

One key program is the Falls Flight Program, developed by Stephanie Tewes, a care coordinator and Falls Prevention Specialist.

"The Falls Flight Program is a meticulously crafted, multi-step approach that combines risk assessments, education and exercise to steer the course toward a fall-free existence," shares Stephanie. "By addressing the root cause of falls and equipping members with the knowledge and tools needed, we're not just preventing accidents, but cultivating a culture of safety."

Since its launch, the educational offering has been introduced to members across Kendal at Home, equipping them to be proactive drivers of their health journey.

Kendal at Home has also joined the Dementia Friends initiative. This global movement aims to "change the way people think, act and talk about Dementia," by raising awareness, challenging stigmas, and providing education and communication points through shared community spaces.

A leader in this area is Terri Lanham, a care coordinator with Kendal at Home, who believes that creating a dementia-friendly community happens with one person at a time. In her work, Terri has partnered with community libraries, firehouses and businesses to make this mission a reality.

Vision for the Future

Lynne Giacobbe, CEO of Kendal at Home shares her vision for the future, "As long as there are more lives to touch, Kendal at Home will continue to serve. We aim to grow services in other areas across the country, to enable the program to partner with other trailblazers in senior living."

Overall, the program aspires to stay dedicated to promoting excellence and inclusivity in the field of senior living services, and to help others grow older in the place they call home.



Lynne Giacobbe, CEO

"As long as there are more lives to touch, Kendal at Home will continue to serve."

—Lynne Giacobbe



KENDAL AT ITHACA

Life Engagement Manager

Assists with Resident Engagement

About a year ago, Kendal at Ithaca created a new position titled Life Engagement Manager. It is doubtful anyone would argue with the fact that developing this role has been a great decision for residents. However, what made it a truly remarkable decision was getting the right person to fill that role. Maria Giampaolo is that person.

"I love the programming Maria Giampaolo is arranging off campus," said one resident. "Maria G. has done a wonderful job with the number and variety of activities since assuming that role," commented another in a recent survey.

As a 28-year veteran of Kendal, Maria started her career in the Health Center as the Director of Therapeutic Recreation. She is well acquainted with Kendal values and the needs and expectations of residents. Her welcoming and calming presence, combined with her natural energy and planning skills, allows her to execute in a way that is perfect for this position.

Resident visioning groups were the first to identify a need for this type of role and provided feedback and insight into what "Living our Best Life" means to them. The Life Engagement Manager is intended to be a resource to assist in implementing resident-driven wellness and engagement opportunities that help residents achieve their best life goals.

Maria has facilitated outings such as sporting events, concerts, lake cruises, museums, wine tours, and more. In addition to the off-campus excursions, she also supports a variety of campus events, with the most recent being Contra dancing and international dance instruction. Maria participates in community outreach initiatives, forging partnerships to create volunteer and vocational opportunities that extend Kendal at Ithaca's impact beyond the campus. The partnership she spearheaded with the local YMCA is an example of leveraging Kendal at Ithaca's wellness initiatives beyond the campus to benefit both the community and Kendal.

While various initiatives take her out and about with groups, Maria also spends a lot of time just talking and, more importantly, listening to individual residents. It is the one-on-one personal interaction where Maria begins building the foundation of her "Life Engagement" position. She often seeks feedback about what type of recreational programming would be most interesting. She relies on her experience using the Quaker collaborative approach

to navigate the variety of wants and needs of this intelligent, active, and diverse resident population.

"I really enjoy interacting with residents and find them to be an amazing group. I learn so much from them and feel lucky to be able to help improve their experience here at Kendal," noted Maria.

Listening and responding to resident feedback creates opportunities for them that are specific to their interests and the local environment. These opportunities allow a consistent way to engage with one another and provide common experiences that strengthen the community. Having a strong community means we have a community that is active and engaged with life.

It appears that increased engagement is truly a positive outcome of creating the Life Engagement Manager position. Maria is on to something, and Kendal at Ithaca is fortunate to have her.

"I really enjoy interacting with residents and find them to be an amazing group."

—Marie Giampaolo



*Laurie Mante,
Executive Director*





ENSÓ VILLAGE Celebrates New Beginnings

Ensó Village celebrated a myriad of milestones in the past few years as the teams from San Francisco Zen Center and Kendal refined the vision of Zen Inspired Living and delivered the beautiful campus to the first generation of residents. The first milestone was the creation of the partnership between these two organizations and the establishment of a Board of Directors, which provided the guidance and support needed to open this first-of-its-kind community.

The project team also enjoyed unprecedented interest from future residents, the designation as a

sustainable campus, the raising of the first beam, and the ground blessing of the site.

Every win has been worth recognition. Yet, amidst these moments, none was as moving as the day the doors opened to residents in the fall of 2023.

Harvest Meal

In November, only a few days after welcoming the first residents, Ensó Village offered the first annual Thanksgiving Harvest Meal — an opportunity to gather in gratitude. The inaugural event included over 60 guests in Sky Hall, the campus dining area, and was composed of residents, families, and team members. It was the perfect way to honor the campus opening.

After the welcoming reception, where words of appreciation and celebration were spoken, Chef Kyle Evans offered the community a full array of traditional American Thanksgiving food, such as turkey, stuffing and mashed potatoes, and delicious vegetarian and vegan alternatives.

Susan O'Connell, visionary founder and current resident of Ensó Village, shares her experience, "Three days after the first residents moved in, we opened the dining room to the next wave of residents so that we could eat, meet and celebrate this time in our lives. Sitting with each other, we were able to talk about new beginnings, explore new friendships and create the container for deep connections to be nurtured."

The friendships among residents and team members have continued to grow since this time, expanding to include new community members who have joined the campus throughout the winter and spring seasons. Mealtime has become the venue for laughter and meaningful conversations about

how to be conscious of and appreciate the aging process and this special time in life.

A Series of "Firsts" for Ensó Village

As the nation's first Zen-inspired Life Plan Community, the inspiration and philosophy of the community are uniquely grounded in Zen and Quaker values. Along the way the community has continued to open and add amenities, providing many other occasions for celebrations.

For example, the campus includes a kitchen garden, a meditation hall, a performance venue, a yoga room, creative maker spaces, a state-of-the-art fitness center, walking paths and much more. The opening of these areas has provided reasons for community celebrations, like a formal blessing of the meditation hall, the inauguration of the swimming pool with joyful immersions, and inspiring interviews in "Friendship Hall" with residents about spiritual paths.

Looking Ahead to More Milestone Memories

Ensó Village continues to plan events and celebrations as new residents move in and new team members join the community. This engagement with the wider Healdsburg community will expand to include area universities, art galleries, civic engagement groups and other "like-hearted" organizations.

"...we were able to talk about new beginnings, explore new friendships and create the container for deep connections to be nurtured.

—Susan O'Connell





KENDAL AT LEXINGTON

Residents Illuminate a Post-Pandemic World

At Kendal at Lexington, there are many who have demonstrated unprecedented dedication to making a difference in the local community. As the world emerged from the pandemic, and once again, connection with others became a priority and privilege, Kendal at Lexington boldly evolved volunteer efforts to best connect with and support others. At the forefront of exhibiting this generous spirit are residents who, together with employee support and access to campus amenities for meeting and event space, have excelled in their commitment to making a positive impact.

Collectively contributing over 200 hours per week to various non-profit and local organizations, residents of Kendal at Lexington stay engaged in efforts such as environmental conservation, food insecurity and much more. Residents volunteer at places like the local election office, Meals on Wheels, and the American Red Cross. This dedication significantly impacts both the organizations and the individuals who receive support.

Gracefully coordinating and promoting the effort, Sylvia Kirgis, a resident of Kendal at Lexington, invests her time heading the Volunteer Engagement Committee. Sylvia's passion has been instrumental in helping to organize events such as the annual volunteer fair, where local non-profits and organizations converge to recruit volunteers. This past year, 19 organizations participated in the fair, which educated residents on ways to get involved within the greater Lexington and Rockbridge Area community.

What sets the work of Kendal at Lexington residents apart is not just the quantity of volunteer hours but the quality of engagement. Residents don't simply complete volunteer hours; they immerse themselves in the work, going where the need is greatest. Whether serving meals to the local community, tutoring at a nearby elementary school or participating in environmental clean-up efforts, residents are at the forefront of meaningful change.

This dedication extends beyond traditional volunteerism. Within the campus

community, residents readily lend a helping hand to one another. From walking dogs to offering one-on-one assistance with daily tasks, there's a palpable sense of camaraderie and support in the community.

"I truly believe, and the committee shares this sentiment, that community service is not only a tremendous benefit to the

individuals that are served but also fulfilling to the volunteers," Jan Bigelow, CEO shared Sylvia. "Kendal at Lexington opens doors for residents to stay engaged with the local community. Every heart finds its unique purpose in serving others, and by staying engaged with volunteer opportunities, we help individuals build a meaningful and fulfilling life."

At Kendal at Lexington, volunteerism is not seen as an obligation but as a privilege — a chance to give back to a community that has given so much to them. This culture of volunteerism is not just a grassroots movement; it's ingrained into the fabric of

Kendal at Lexington's community spirit. Staff members have shown dedication to community engagement by supporting and encouraging residents as they embark on individual and collective volunteer journeys.

"We are continually inspired by residents, who remind us of the daily importance of living life to the fullest," said Jan Bigelow, CEO of Kendal at Lexington. "Together, we're creating a legacy of kindness and service that enriches us all."

With vigor, residents of Kendal at Lexington emerged from a period of cautiousness and set forth to wholeheartedly invest in community engagement and volunteerism. With unwavering dedication and passion, residents are setting a new standard for what it means to be actively involved citizens.

“We are continually inspired by residents, who remind us of the daily importance of living life to the fullest.”





THE KENDAL CORPORATION

Evolving Sustainability Across the Kendal System

In 2023, the Kendal System, guided by a core Quaker value of environmental stewardship, recognized significant advancements in sustainability initiatives. This commitment included concrete actions to immediately reduce the organization's carbon footprint and foster operational practices that will benefit communities in the long term. The collective effort across the Kendal System is a testament to the belief that environmental care is a shared responsibility that builds resiliency. Kendal's investment in these areas can inspire those seeking to grow sustainable living within community settings.

Across the country, Kendal Affiliates are engaged in many unique sustainability initiatives tailored to their local needs and conditions. From Lathrop Community's focus on sustainable landscaping to Kendal at Lexington's electric vehicles and composting efforts, the attributes of sustainability are woven into each community's daily operations and long-term planning. From coast to coast, Kendal Affiliates are taking steps to support their local environments. In New York, Kendal on Hudson is developing a comprehensive Sustainability Action Plan to incorporate eco-friendly practices into its physical infrastructure and new campus refresh project. Meanwhile in California, Ensó Village was built from the ground up with a solid commitment to green construction and creating a sustainable community living environment.

Across the Kendal footprint, initiatives are under way to address energy efficiency, waste reduction, use of alternative energy, and the creation of wildlife-friendly habitats. These efforts demonstrate

Kendal's leadership in embedding sustainability into every facet of senior living and aging services operations and philosophy, and exemplifies a holistic approach to sustainability. Investment in these areas can also bring quantifiable health benefits and significant cost savings.

Listed below are some examples of how Kendal Affiliates are evolving their commitment to sustainability. A comprehensive list can be found at <https://www.kendal.org/about-kendal/kendal-values/sustainability/>

- **Barclay Friends** in West Chester, Pennsylvania, embraces various programs, from composting kitchen waste to leveraging technology for energy efficiency and supporting local food banks with fresh produce grown on-site.
- **Collington** in the greater Washington, D.C. area, established a campus sustainability plan, conducted energy audits, and introduced electric vehicle charging stations, representing steps toward a greener future. Furthermore, the accreditation as a Level 1 Arboretum and dedication to native plant species underlines a commitment to preserving biodiversity and educating residents about the importance of environmental care.
- **Ensó Village** in Healdsburg, California, stands as a beacon of sustainable design and operations, striving for a net-zero carbon footprint. From solar power generation to utilizing municipal geothermal energy, Ensó Village exemplifies forward-thinking in sustainable community living. The commitment to using Red List-

free building materials further highlights the emphasis on health and environmental safety. Ensó Village will also be growing its own vegetables and herbs for use in the community's dining programs.

- **Kendal at Hanover** in New Hampshire illustrates how community engagement and technological advancements can drive sustainability. Energy audits, the community's Working Environmental



Sustainability Team (WEST), and initiatives like LED replacement and composting are a few of the community's environmental efforts. The focus on native plants and invasive species removal, alongside an impressive adoption of renewable electricity, showcases the multifaceted approach to sustainability. Kendal at Hanover has recently observed "Dark Skies" (low artificial light at night to better view the stars) and supports the local program of the same name.

- **Kendal on Hudson** in Sleepy Hollow, New York, encourages sustainability by blending progressive environmental stewardship with

enriching residents' lives. Embarking on an ambitious Sustainability Action Plan, while launching composting and recycling programs, the community will incorporate sustainability initiatives into the upcoming Commons Refresh Project. Kendal on Hudson is also a Certified Wildlife Habitat through the National Wildlife Foundation.

- **Kendal at Ithaca** in New York introduced expanses of low-mow grass, signaling a move towards greener turf alternatives. The community celebrates Earth Day through tree planting and attentive landscape cultivation. It embraces a wide range of programs to support sustainable goals, which include installing Trex benches earned through recycling plastic film and adding EV charging stations on-site.
- **Kendal at Lexington's** picturesque community in the Blue Ridge Mountains of Virginia has championed initiatives such as the Peak Energy Shaving program. Renovation and remodeling initiatives have successfully integrated eco-friendly HVAC systems and insulation into every refurbishment. They are committed to setting a new benchmark for energy efficiency with the addition of charging stations for residents and powering the fleet of electric-powered campus operations vehicles.
- **Kendal at Oberlin** in Ohio has a comprehensive Campus Sustainability Plan, Master Landscape Plan and energy audit underway. The community transitioned to LED bulbs for community spaces and residences and adopted electric vehicle charging stations to support clean transportation. Geothermal energy provides heat for many cottages while solar arrays will also cover resident parking garages. Kendal at Oberlin



Across the country, Kendal Affiliates are engaged in many unique sustainability initiatives tailored to their local needs.



is certified as a Level 2 Arboretum, with extensive walking paths highlighting the many species of trees.

- **Lathrop Community** in Easthampton and Northampton, Massachusetts, has a dedicated Sustainability Committee that targets pivotal areas such as energy, water, waste, and land management. Composting is practiced and celebrated, with bins installed near communal gardens, transforming kitchen scraps into nutrients that can be added to the soil. There is also a robust program that has been focused on the removal of invasive species on the campuses and in the woods surrounding them.

The comprehensive approach Kendal Affiliate communities take represents a dedication to embracing standard practices and setting new benchmarks for sustainability within the senior living field. Through collaborative efforts and a commitment to continuous improvement, Kendal sets an impressive precedent for ecological responsibility and stewardship, which will evolve and, hopefully, inspire and offer the best practices models for other organizations to follow suit.

Please note: Kendal at Home is a Life Plan at Home model that does not operate a campus community.



LATHROP COMMUNITY

Evolves Campus Garden

At Lathrop Community, residents are the drivers of many conservation, sustainability and beautification projects. Recently, residents came together to redesign a prominently located garden into an attractive, naturally picturesque gateway to the campus for residents, employees and visitors. The community hosts acres of woods, meadows, vernal pools, streams, and wetlands. Lathrop's East campus has 140 acres that are undeveloped, and the North campus has 14 acres, adjoining 560 acres of conserved public land (Fitzgerald Lake Conservation Area).

A Garden of Native Plants

The goal was to create a visually pleasing garden that meets Lathrop's environmental goals for sustainability and climate resilience. From the project's inception, it was essential that the garden be composed of native flowering trees and shrubs, and plants that would provide attractive year-round interest.

Plants were sourced from Nasami Farm, whose mission is to sell New England's native plants. These plants are adapted to the local climate and are more sustainable throughout weather changes. They also supply food to the local insects that are dependent upon native species, as well as the birds and mammals that rely on their seeds.

Growing Together

To ensure community understanding and support, the garden committee developed a scale model and photo board with pictures of the recommended



plants which were displayed in the Inn lobby. Residents were encouraged to share written comments and also send emails with feedback. There were articles on the resident list-serve and in the community's weekly newsletter. This feedback positively impacted the direction of the project. The design evolved to incorporate resident desires for open views across the garden, additional seating, and some non-native spring-flowering bulbs.

Management was also consulted in the planning and design. Patrick Arguin, CEO, shares, "Residents' excitement about the project was

“Residents' excitement about the project was infectious... The leadership team at Lathrop is pleased to support this initiative.”

—Patrick Arguin



Patrick Arguin, CEO

infectious. I enjoyed seeing the 3D model, the residents'

participation in the final design, and how the entire campus was buzzing about the idea. The leadership team at Lathrop is pleased to support this initiative.”

The funding for the Inn Garden was a joint effort of management funding and resident association funding, showing the collective passion for moving the project forward.

Next Steps in the Garden

This spring, residents are looking forward to the garden's preparation

and planting. As it matures, it will continue to enhance the entrance to the Inn and the important adjacent resident gathering spaces. In addition to the pleasure for current residents, staff and visitors, it will make a long-term and important environmental contribution. Both Lathrop and the wider community will benefit from a garden that demonstrates the use of native plants and educates people about the benefits. The Committee Chair has been asked to present the project to volunteers at Smith College Botanic Garden and other ways to promote the garden are in the works.



KENDAL AT HANOVER

Planning a Sustainable Future: EAST Meets WEST

Residents and employees transition from energy audit to collaborating on sustainability goals

Nestled along the sloped banks of the Connecticut River and its landscape's vibrant greenery, Kendal at Hanover took a significant step toward a sustainable future in 2023. The campus completed an energy audit that was met with enthusiasm and curiosity, as residents have long recognized the importance of reducing their carbon footprint and preserving the environment for generations to come.

Kendal at Hanover updated their Guiding Principles last year to include the following statement on environmental sustainability:

Kendal at Hanover is a community committed to the appropriate use and conservation of our planet's resources. As stewards of the earth who are called to protect and preserve the environment for future generations, we are resolved to achieve Scope 1 and Scope 2 carbon neutrality throughout our campus. (Scope 1 covers direct emissions from sources controlled within an organization, and Scope 2 indirect emissions are from energy sources an organization purchases and uses.)

Energy Audit Sprint Team (EAST)

With these principles at the forefront of their efforts, a team of dedicated residents and employees formed the Energy Audit Sprint Team (EAST). EAST embarked on a journey to uncover the community's energy consumption patterns and identify areas for improvement. Working with a professional energy auditing firm familiar with the demands created by harsh northern New England weather, EAST monitored the auditing process carefully.

The energy audit was completed in Fall 2023, and a report was prepared for the EAST members. The report included a cost analysis of what would be the most economically feasible and impactful on energy consumption.

Kendal at Hanover took a significant step toward a sustainable future in 2023.



Beth Vettori, CEO

Working Environmental Sustainability Team (WEST)

With EAST's work overseeing the energy audit completed, it was time to introduce a new team responsible for working through the various recommendations to develop an energy sustainability plan. This team has become known as WEST, the Working Environmental Sustainability Team.

The WEST members include a small team of residents and staff who will call upon others, including subject-matter experts, as needed. WEST's focus is on organizing and promoting ways to address environmental responsibility, resource efficiency, and the reduction of Kendal at Hanover's carbon footprint in accordance with the revised Guiding Principle on environmental sustainability.

As of mid-April, WEST is identifying priorities from the recommendations provided in the energy audit that will be the basis for the work plan. Some of these items include:

- Evaluation of heat pump technology for heating and cooling
- Improvements to the building envelope to reduce energy loss
- Placement of electric vehicle chargers
- Upgrades to major mechanical systems in the Community Center
- Expansion of LED lighting throughout the Community Center

New Chapter Evolving

The completion of the energy audit marked a significant milestone in the community's journey towards environmental stewardship. With enthusiasm and dedication, residents and staff have come together as the EAST and WEST teams, embodying the spirit of collaboration and shared responsibility.

As WEST takes the reins, armed with the insights gleaned from the audit, they embark on a new chapter of action and implementation. This is also a new chapter in Kendal at Hanover's story, one that emphasizes the timeless bond between community and environment.





KENDAL ON HUDSON

A Refreshing Approach to Reduce, Reuse, Recycle

On the banks of the Hudson River, the residents of Kendal on Hudson see daily the beauty of nature's bounty. Constantly reminded of the gift that is the natural environment, they take their responsibility seriously to make meaningful changes for a more sustainable future.

A Revived Approach

Small yet meaningful features around campus highlight the collective effort of residents and employees to reduce, reuse and recycle. Kendal on Hudson's facilities department installed hands-free water faucets, smart thermostats, and occupancy sensors; adopted battery-operated landscaping tools; and set up rain barrels to catch rainwater. All members of the community are encouraged to participate in efforts such as separating recyclable materials and limiting single-use plastics. These seemingly small steps, over time, will greatly impact the environment.

"In everything we do, we aim to limit as much as possible any negative impacts on the environment," said Bob Michael, Director of Facilities at Kendal on Hudson. "It makes sense from an operational standpoint, but what's more is that the community feels a great responsibility and joy when it comes to doing something positive for Mother Earth."

At Kendal on Hudson, community members remain nimble in their approach to sustainability initiatives. They understand the care that must be provided to the environment and are ready to meet the challenge by evolving their actions to best serve the planet. This year, the resident-led Environmental Stewardship Committee introduced exciting

programs to inject new energy into the work to achieve these goals.

New Initiatives to Re-Energize

Residents organized an effort to collect food scraps and other organic matter to ultimately be composted by the village of Sleepy Hollow, where Kendal on Hudson is located. After a visit to the composting demonstration site at the Westchester County Recycling Center in Valhalla, New York, resident Anne White was inspired. With help from fellow residents on logistics, she made arrangements to launch a small composting program on campus that would contribute to an existing composting program of the village of Sleepy Hollow.

The small group test was a success and residents felt energized by this new program that could support the larger goal of reducing waste. The committee aims to roll out the organic collection program to the residents at large in 2024.

In today's world, and being so close to the fashion mecca of New York City, a seemingly endless supply of new fashion options pop up in stores. Clothing that is no longer wanted is often turned to waste. To help solve this, residents regularly donate clothing to organizations that responsibly recycle or donate these goods, ensuring that clothing can find a second life. This year, Kendal on Hudson made the switch to collecting on demand to accommodate all who seek to reduce their waste, no matter the season.

Understanding that more good can be done with the support of partners, individual

community members from Kendal on Hudson joined SSAFE (Senior Stewards Acting for the Environment), a 501c (3) organization founded by residents of Kendal Affiliates. The group works within their communities to make a positive impact on environmental matters.

Sustainability Efforts on the Horizon

The community at Kendal on Hudson truly lives out its commitment to the earth, and to that end, it has plans on how it may continue to evolve practices to support a sustainable planet. In fact, the community has already retained an outside consultant to bolster sustainability practices, beginning in 2025. Future plans also include the potential installation of a summer boiler that would reduce the amount of fuel used, conducting a feasibility study on the installation of solar panels, and more.

Residents and employees feel pride in knowing that future generations will benefit in some way from the environmental activism being done today.



Jean Eccleston, CEO

“In everything we do, we aim to limit as much as possible any negative impacts on the environment.”

—Bob Michael



COLLINGTON A CULTURE OF SUSTAINABILITY

Society is witnessing first-hand the effects of climate change and the threat our carbon footprint has imprinted upon the planet. Before such dramatic evidence emerged, Collington recognized humanity's role as stewards of the Earth, not only for the present generation but for future generations as well.

Collington, deeply influenced by its Quaker-inspired commitment to the environment, has embraced sustainability as an ethical imperative. This commitment materialized in the form of Collington's Sustainability Plan, launched in 2021 with the aim of effecting collective change. Over the course of three years, through the concerted efforts of management and resident committees, this plan is making an impact.

The Sustainability Plan introduced a comprehensive array of initiatives that have since become integral to Collington's culture. Today, sustainability is interwoven into the very fabric of life at Collington, where residing on campus inherently entails a dedication to environmental stewardship.

A Community in Action

Collington's focus on sustainability is evident in its adoption of over 30 initiatives spanning recycling, green energy, reusable resources, and landscaping. Residents are provided ample opportunities to engage in daily practices that contribute towards carbon neutrality. Even marketing and sales efforts prioritize sustainability, ensuring that prospective residents are aligned with Collington's eco-conscious ethos from the outset.

Residents of Collington also join Kendal Affiliates across the country in the mission of Senior Stewards Acting for the Environment (SSAFE), a non-profit dedicated to mitigating global warming by sharing residents' experience, knowledge and resources. In 2023, SSAFE established the "Mike Burke Annual Award for Excellence in Advocacy" in honor of the late resident of Collington who inspired others with environmental activism.

To commemorate the successful implementation of the Sustainability Plan,

Collington initiated its inaugural Earth Week celebrations. Residents and team members engaged in beautification projects across the 125-acre campus and indulged in vegetarian meals in the dining rooms. Prospective residents were also invited to partake in nature tours, further highlighting Collington's commitment to sustainability.

Steps Beyond a Sustainability Plan

Collington's environmental consciousness persists beyond the completion of the initial Sustainability Plan. A new plan is currently in development, with renewed green goals on the horizon.

“At Collington, sustainability transcends individual initiatives; it is a way of life and a shared responsibility.”

—Megan Barbour



Ann Gillespie, CEO



“We are continually seeking opportunities to enhance our community through the introduction of eco-friendly alternatives,” remarked Megan Barbour, Chief Operating Officer at Collington. “Initiatives such as installing our EV Charging Stations and reducing single-use plastics demonstrate our ongoing commitment to sustainability.”

While leadership plays a pivotal role in steering Collington towards a greener future, the true essence of the movement lies within the residents. For instance, the success of Collington's recycling program is credited to the proactive involvement of the residents,

who have transformed it from a mere program to a source of community pride.

“At Collington, sustainability transcends individual initiatives; it is a way of life and a shared responsibility,” Megan emphasized.

In essence, sustainability at Collington goes beyond a mere plan; it is ingrained in the very essence of campus operations and the daily lives of its residents and team members.

System Finances

The Kendal System, The Kendal System, established in 1971, is a collaborative network of interdependent not-for-profit senior-living programs, communities, and services inspired by the principles of the Religious Society of Friends (Quakers). Kendal's *Values and Practices*, shared among all Affiliates, form the foundation of our operations. The System has evolved into a federal-style model, now encompassing 10 operating Affiliates across the country with one under development in Southern California. Each Kendal Affiliate functions as a locally governed 501(c)(3) organization with an independent Board of Directors and leadership team, maintaining strong ties to their respective local communities.

In this federal-style model, **The Kendal Corporation (TKC)** serves as the supporting organization, coordinating services, implementing model practices, and fostering mission-aligned growth throughout the Kendal System. Each Kendal organization manages its financial resources and obligations independently, which allows for both local responsiveness and the collective scale of a larger, values-driven system.

The Kendal Corporation has a pivotal role in the stability and expansion of the Kendal System. In 2023, TKC focused on strengthening the relationships across all Affiliates and enhancing our Quaker legacy. Key initiatives included the implementation of new technology platforms to streamline administrative processes and improve resident services. TKC also spearheaded efforts to enhance staff training programs, ensuring that employees are well-equipped to provide exceptional service and support to residents.

In 2023, we celebrated the official opening of Ensó Village, the newest Kendal, in Northern California. Ensó Village, a Zen-inspired senior living community, embodies Kendal's commitment to innovative and holistic approaches to healthy aging. The addition of Ensó Village marks a significant milestone, being the first new Kendal community in a decade.

The Kendal Group Health Plan continued to provide comprehensive health benefits to approximately 420 employees and their dependents, maintaining a robust reserve of \$3,800,000 at year-end. In alignment with our commitment to employee welfare, we have also expanded our retirement benefits. The Kendal-sponsored retirement plans, including 403(b), 401(a), and 457 retirement savings plans, now boast a combined market value of approximately \$80,000,000, offering secure retirement options to over 7,500 participants. This expansion reflects our ongoing efforts to attract and retain top talent within the senior living sector.

Throughout 2023, Kendal Affiliates engaged in numerous community outreach and sustainability initiatives. Our commitment to environmental stewardship saw the implementation of energy-efficient systems across several communities, significantly reducing our carbon footprint. Additionally, Kendal Affiliates collaborated on community service projects, strengthening our ties with local communities and enhancing the lives of those we serve.

As we look forward in 2024 and to 2025, The Kendal Corporation remains dedicated to fostering a supportive, innovative, and values-driven environment for all Affiliates, ensuring that we continue to provide exceptional services and support to residents and members.

—Amy Harrison, Chief Financial Officer

BARCLAY FRIENDS — At Barclay Friends, our commitment to fostering a vibrant, nurturing community remains unwavering. 2023 was a testament to our resilience and dedication to providing exceptional services, support, and companionship to residents. Despite regulatory and labor market headwinds, our census remained strong with an average occupancy of 92%. The increase in net assets was positive at over \$1.5 million and all debt covenants were met. Barclay's net asset position remains strong at over \$33 million with cash and unrestricted investment balance in excess of \$19 million.

—Jennie Bury, Chief Financial Officer

COLLINGTON — Collington came out of the challenges of 2022 and ended 2023 with a positive year-end balance. Average occupancy for 2023 was 90.9% with December 2023 occupancy at 92%. Long Term Debt Service Coverage Ratio increased significantly by year-end at 2.45x compared to the prior year's 1.48x. Days Cash on Hand also increased to 182 days compared to 2022's 164 days at the end of 2023. The biggest increase was noted in the Net Operating Margin Ratio, ending the year at 9.31%. 2023's financial success was due to many factors including an improved investment market, better management of expenses, and the continuation of excellent service to residents.

In early 2023, Collington delicensed the 44 accommodations in the skilled nursing wing and increased assisted living residences by 12, bringing the total number of assisted living residences to 77. This change was due to the declining need and occupancy of the skilled nursing accommodations. Collington was able to make this change and save approximately \$900,000 per year in additional costs without reducing the workforce.

The Collington Foundation raised \$375,329 in monetary and in-kind contributions. This helped fund \$46,969 in scholarship grants for team members and \$272,311 in fellowship grants for residents.

Overall, Collington continues to improve the community's financial status, update the bucolic campus, and provide excellent service to all campus residents.

—Courtney Corcoran, Chief Financial Officer

ENSÓ VILLAGE — With the construction of a brand new \$297 million campus nearing completion, Ensó Village welcomed the first residents on November 21, 2023, officially marking the end of construction! In just six weeks of operations, Ensó Village ended 2023 with over 100 residents calling it home and another 100 residents already scheduled to move in during the early months of 2024.

Despite the brief operational period in 2023, Ensó Village collected almost \$76 million in Entrance Fees and expects to collect another \$60 million by the end of Q1 2024. While the increase in staffing costs is a

challenge, we are not facing it alone. Thanks to the incredible campus, employee members are actively seeking to join the community! By the end of 2023, all leadership positions were filled, and Ensó Village proudly employs over 35 employees, with plans to grow to 90 by the end of 2024.

—Adam Bulatewicz, Controller

KENDAL AT HANOVER recognized an “Excess of Revenues over Expenses” of approximately \$7,080,000 in FY 2023. Some of the financial bright notes for Kendal at Hanover during FY 2023 were the following:

- Kendal at Hanover continues to maintain a “BBB+ positive outlook” 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 2023 at 801 days.
- The growth and financial strength of our prospective residents’ Wait List, which increased from 678 to 719 apartment applications.
- The strong net entrance fee receipts that grew from \$9,833,711 in FY 2022 to \$12,864,839 during FY 2023.
- Kendal at Hanover recognized a strong investment portfolio market with non-operating gains of nearly \$4,823,000 and contributions without donor restrictions of approximately \$299,000.
- In conversations with the State of New Hampshire Insurance Department in FY 2023, Kendal at Hanover received approval to transfer \$4,000,000 of overfunded New Hampshire Reserve Funds to our unrestricted investment portfolio. In addition, with the sale of the overfunded New Hampshire Reserve Funds and additional rebalancing during FY 2023 with the strong investment portfolio market, Kendal at Hanover recognized approximately \$1,387,000 in realized gains in the fiscal year.

Like many Kendal Affiliates, Kendal at Hanover continues to make progress in addressing the workforce challenges found within our field. We

are noticing less of a reliance on nursing agencies, further building on our reputation that Kendal at Hanover is a great place to work.

—Brent Edgerton, Chief Financial Officer

KENDAL AT HOME As we approach our 20th anniversary in 2024, we reflect on our journey from inception to the present and look ahead to future opportunities. This past year, the theme of “Stability” has been pivotal as we have strengthened our foundation to support current members and expanded our reach organically and without accruing debt. This strategic expansion allows us to serve a growing number of individuals committed to aging successfully in their preferred settings.

At the core of a Kendal at Home membership are three pillars: Healthy Aging, Care Management, and Care Coverage. Our membership tiers are designed to ensure proactive planning for healthy aging, personalized care management advocacy, and a selection of care coverage levels tailored to meet individual financial circumstances and provide peace of mind. This year, we introduced a new Foundation Plan, priced more accessibly and supporting the first two pillars. This plan was chosen by 40% of new members in 2023, signaling a strong start toward reaching a broader audience.

Membership growth was robust, with the addition of 36 new members, reaching a total served of 399 this year. Our prior expansions into Massachusetts and Kentucky were particularly successful, accounting for 47% of new memberships. On the philanthropic front, we’ve deepened our commitment through initiatives such as the Possibilities Fund, which supports the skilled healthcare personnel we contract to assist members, and the Member Assistance Fund, which helps members who may outlive their resources. A highlight of the year was receiving our first legacy gift, marking a significant milestone in the organization’s history.

Our focus on financial stability has paid off, leading to reduced operating expenses and a strong operating surplus. As we stand on the cusp of the next 20 years, we are well-positioned for growth, driven by our unwavering dedication to serving members, investing in staff and operations, and embracing innovation in the face of challenges. This past year’s achievements are not

just reflections of our financial health but also stepping stones toward future excellence.

—Karen Graham, Chief Financial Officer

KENDAL AT ITHACA — 2023 stood out as a year of impressive achievement and success. After a rigorous survey process, Kendal at Ithaca again earned a five-year CARF Accreditation that recognizes the organization’s commitment to quality resident care and services. The surveyors identified numerous organizational strengths, including the level of resident and employee engagement, a local community collaboration to enhance the lives of older adults, and a focus on data to support decision-making and benchmarking of performance. 2023 was also a banner year for Independent Living (IL) occupancy, averaging 94.1% and finishing the year at 95.3%. Not since 2013 had IL occupancy averaged above 90%. The IL census growth helped Resident Fee revenue increase by 9.3% over the prior year. Health Center occupancy was also steady throughout 2023, with occupancy for Assisted Living and Skilled Nursing averaging 96.3% and 85.0%, respectively. The revenue growth helped Kendal at Ithaca meet the challenge of rising expenses, particularly labor costs. As a result, Kendal at Ithaca showed a Gain from Operations of just over \$1.0 million and maintained strength in key financial indicators. Days Cash on Hand ended FY 2023 at a healthy 759 days, and the Debt Service Coverage Ratio was a solid 3.13 at year-end. In addition, the Actuarial Compilation Report, as of December 31, 2023, showed all key actuarial measures continuing to trend higher, indicating that the long-term financial position is extremely healthy.

—Gregory Sommers, Chief Financial Officer

KENDAL AT LEXINGTON — As Kendal at Lexington reflects on 2023, the community is incredibly proud and grateful for its accomplishments. Kendal at Lexington continued to focus on its infrastructure as it implemented a few significant projects. One was the replacement of 23-year-old roofs for the Anderson Center and North and South apartment buildings. In addition, the community began installing a door access system that will limit access to the main building during specified hours.

Kendal at Lexington established partnerships with external organizations to bolster community initiatives. Among these collaborations, Kendal at Lexington supported various outside entities such as ConnectionsPlus Healthcare + Hospice and Habitat for Humanity. Our contributions have played a pivotal role in constructing homes for families facing housing insecurity and providing vital assistance to the community during times when hospice care is required.

Kendal at Lexington also worked closely with students on two capstone projects with nearby Washington & Lee University and internship-workforce development programs with Rockbridge County High School, Mountain Gateway Community College, and Virginia's registered apprenticeship program.

Financially, the community's total operating revenue was 6.9% higher than the previous year, while total expenses increased by slightly over \$1.0 million (5.7%). The result was an operating gain of \$1.6 million and a total increase in net assets of \$5.6 million.

Residential living occupancy was strong, with an average of 93.1% for the year, and the net residential services revenue was slightly over \$9.5 million. The average occupancy of the Webster Assisted Living Center declined from the previous year to 81.6%, with a revenue of \$961,000. The average occupancy for the Borden Health Center also declined to 59.7%, with a revenue of \$4.1 million.

With the market improving, Kendal at Lexington recognized almost \$1.6 in investment income and \$3.6 in unrealized gains on investments. This attributed to the community's highest Days Cash on Hand of 940 days. Kendal at Lexington welcomed 19 new residential residents with total entry fees of \$6.7 million. The Debt Service Coverage Ratio was 2.97.

At year-end, Kendal at Lexington embarked on a market study initiative to review current building plans and programs and explore options for repositioning and expanding services on campus.

Kendal at Lexington is looking forward, planning for its future and excited for the new opportunities.

—Felicia Bush, Chief Financial Officer

KENDAL AT OBERLIN — Kendal at Oberlin celebrated its 30th anniversary in 2023, reflecting on the past with a focus on the future! There were several significant financial accomplishments completed in 2023 that included:

Kendal at Oberlin's \$60+ million investment portfolio transitioned to a new investment advisory firm to serve as Kendal at Oberlin's Chief Investment Officer, with a significant focus on ESG investing. This is consistent with Kendal's Quaker Values.

A new Entry Fee Assistance Fund was established and seeded in 2023 through philanthropic support. This new fund is a long-term investment and supports the Strategic Plan goal of Diversity, Equity, Inclusion and Belonging (DEIB).

Continued evaluation of growth opportunities on and off the campus using the "Growth Toolkit" developed by Kendal at Oberlin's Board of Directors.

There is ongoing investment in outreach in the greater "CommUnity," with a special focus on the College Village Apartments, an affordable housing complex adjacent to Kendal at Oberlin's main campus. In 2023, Kendal Northern Ohio, Kendal at Oberlin's outreach arm, invested over \$700,000 into the College Village Apartments to improve the building envelope and enhance the lives of those who live there.

Conversion of the note receivable from Kendal Northern Ohio of \$650,000 to Community Benefit by the Kendal at Oberlin Board of Directors.

The continued planning for Kendal at Oberlin's future technology needs through people, process, and evaluation of new software systems to support operational improvements and enhance the resident experience.

The Fitch Rating Agency affirmed Kendal at Oberlin's A+ rating with a stable outlook. Fitch indicated the rating reflects Kendal at Oberlin's strong market position, with a national draw and minimal local competition for its Type "A" contract, midrange operating risk, and a history of solid operating metrics and steady capital spending.

Kendal at Oberlin celebrated its 30th anniversary and reflected on its impact on enriching resident

lives, supporting economic growth and impacting the larger community. It has created a strong financial foundation that will continue to support Kendal at Oberlin as a leader in the field of aging.

—Ann O'Malley, Chief Financial Officer

KENDAL NORTHERN OHIO — Kendal Northern Ohio is the outreach arm of Kendal at Oberlin, which promotes intergenerational activities and develops innovative services for older adults that complement those of existing organizations. The following accomplishments have been highlighted for Kendal Northern Ohio:

The support of two community entities as the Fiscal Agent, including:

- The OberlinKids Collaborative which supports young children and families in the Oberlin area regarding educational readiness from birth to school-age children.
- The Oberlin Community Land Trust seeks "to strengthen diversity and grow communities by holding land in trust for permanently affordable, sustainable housing, home ownership, and other community needs."

With financial support from Kendal at Oberlin, Kendal Northern Ohio purchased an affordable housing complex (College Village Apartments) located next to Kendal at Oberlin's campus. This strategic investment supports Kendal's vision to expand its mission to serve a broader market demographic and maintain affordable housing in the City of Oberlin. In 2023, Kendal Northern Ohio could reinvest in the complex using a construction loan secured as part of the permanent financing. Kendal Northern Ohio spent over \$700,000 on The College Village Apartments building envelope and heating and cooling equipment to enhance the lives of those who live there.

The note payable to Kendal at Oberlin of \$650,000 was approved to be converted to Community Benefit by Kendal at Oberlin's Board of Directors. This will enhance Kendal Northern Ohio's future balance sheet and statement of operations.

Continued participation in a special membership agreement with another non-profit organization to

support home health services for residents of Kendal at Oberlin, Lorain County, and specific zip codes in Cuyahoga County.

Ongoing development of a community outreach plan focused on supporting healthy aging and access to health care, transportation needs in Lorain County and housing needs in the City of Oberlin.

—Ann M. O'Malley, Chief Financial Officer

KENDAL ON HUDSON ended 2023 in strong financial condition with 95.5% occupancy in Independent Living, 1,039 days cash on hand and a debt service coverage ratio of 4.65x. There were 16 move-ins for the year, generating net entrance fee proceeds of approximately \$9.9 million. Total operating revenue for the 12 months ended December 31, 2023 approximated \$39.5 million. Health care occupancy was strong in Assisted Living at 88.9% for the year and lower in Memory Care and Skilled Nursing at approximately 65.7% and 71.2% for the year, respectively. Total operating expenses for the 12 months ended December 31, 2023 approximated \$35.7 million, an increase of 3.5% compared to 2022. Investments grew by \$4.8 million, an increase of 8.4%. Kendal on Hudson is in compliance with all debt covenants at the end of the year.

—Jean Eccelston, Chief Financial Officer & CEO

LATHROP — In 2023, the Lathrop Community celebrated 35 years of operation since our incorporation in 1988. Our 35th year was a successful one. The occupancy rate was 98% resulting in occupancy revenue exceeding our budget by more than \$500,000. The operating margin was 16% for the year versus the budgeted operating margin of 6%. Cash doubled from \$1.1 million to \$2.2 million. At the same time, we paid off close to \$370,000 of long-term debt leaving us with a total bank debt balance of \$1.1 million at the end of 2023. Days cash on hand exceeded the goal of 150; we ended the year with 201 days cash on hand.

We continue to make improvements to our campus and our processes. We welcomed a new Chief Executive Officer, Patrick Arguin, in November. Three new staff positions were created to add efficiency: a business manager for the finance department, a wellness coordinator who can incorporate her Occupational Therapy skills, and a development officer to work on fundraising opportunities. Facilities upgrades included a new roof for the Northampton Meetinghouse, a new efficient HVAC system for the Inn, environmentally friendly LED streetlights through the Easthampton campus, and a new 14-passenger van for outings.

—Holly Smith-Bové, Chief Financial Officer



The Kendal Corporation

Condensed Financial Information

beginning 1/1/23 and ending 12/31/23

BALANCE SHEET

Assets	
Cash and Investments	3,320,789
Receivable from Affiliates and Intercompany	4,195,816
Other Assets	<u>14,839,556</u>
Total Assets	<u>22,356,161</u>
Total Liabilities	6,659,190
Without Donor Restrictions	14,544,604
With Donor Restrictions	1,152,367
Total Net Assets	15,696,971
Total Liabilities and Net Assets	<u>\$22,356,161</u>

Statement of Operations

Operating Revenue	
System Fees from Affiliates	7,725,986
Development Fees	354,615
Investment and Other Income	<u>826,373</u>
Total Operating Revenue	8,906,974
Expenses	10,142,077
Operating Gain (Loss)	(1,235,103)
Non Operating Revenue	
Reserve Fee from Affiliates	225,708
Realized Gains (Losses) on Investments	842,174
Change in Defined Benefit Pension Plan	(676,369)
Unrealized Gains (Losses) on Investments	<u>(203,476)</u>
Increase (Decrease) in Unrestricted Net Assets	<u>\$ (1,047,066)</u>

Kendal Operating Affiliates Selected Financial Information

Fiscal year ending	Collington 12/31/23	Ensó Village 12/31/23	Kendal at Hanover 12/31/23	Kendal at Ithaca 12/31/23	Kendal at Lexington 12/31/23	Kendal at Oberlin 12/31/23
Total Assets	<u>\$82,850,367</u>	<u>\$374,782,099</u>	<u>\$198,960,479</u>	<u>\$117,057,252</u>	<u>\$113,718,505</u>	<u>\$124,198,609</u>
Total Liabilities	113,541,122	396,182,711	134,014,613	105,276,930	94,323,003	63,540,606
Net Assets						
Without Donor Restrictions	(35,189,765)	(21,400,612)	52,660,110	10,170,407	17,286,096	53,822,622
With Donor Restrictions	4,499,010	0	12,285,756	1,609,915	2,109,406	6,835,381
Total Net Assets	(30,690,755)	(21,400,612)	64,945,866	11,780,322	19,395,502	60,658,003
Total Liabilities and Net Assets	<u>\$82,850,367</u>	<u>\$374,782,099</u>	<u>\$198,960,479</u>	<u>\$117,057,252</u>	<u>\$113,718,505</u>	<u>\$124,198,609</u>
OPERATING SUMMARY						
Total Income	32,317,863	600,378	36,392,561	30,108,559	21,419,743	24,201,090
Total Expense	<u>32,445,230</u>	<u>8,404,523</u>	<u>36,138,832</u>	<u>29,088,801</u>	<u>19,779,450</u>	<u>23,361,304</u>
Gain (Loss) from Operations	(127,367)	(7,804,145)	253,729	1,019,758	1,640,293	839,786
Realized Gain (Loss) on Sale of Investments	(468,759)	0	1,387,081	(610,026)	(1,679)	2,117,994
Unrealized Gain (Loss) on Investments	1,584,368	0	4,835,708	2,213,950	3,619,340	3,793,254
Change in Value of Interest Rate Swap/Caps	0	0	(193,261)	0	0	(356,582)
Unrestricted Contributions	0	0	298,911	0	63,266	13,741
Assets Released from Restriction for Capital	0	0	0	59,944	9,791	41,642
Gain (Loss) on Property, Plant and Equipment	0	0	(4,574)	(1,914)	(10,302)	0
Other	<u>0</u>	<u>0</u>	<u>515,141</u>	<u>0</u>	<u>0</u>	<u>(1,163,146)</u>
Incr (Decr) in Net Assets without Donor Restrictions	<u>\$988,242</u>	<u>\$(7,804,145)</u>	<u>\$7,092,735</u>	<u>\$2,681,712</u>	<u>\$5,320,709</u>	<u>\$5,286,689</u>

Kendal on Hudson 12/31/23	Lathrop 12/31/23	Barclay Friends 12/31/23	Kendal at Home 12/31/23	Kendal Northern Ohio 12/31/23
<u>\$199,846,701</u>	<u>\$20,250,178</u>	<u>\$54,192,433</u>	<u>\$8,497,195</u>	<u>\$3,138,466</u>
203,365,186	45,702,230	20,516,180	14,794,917	2,920,287
(3,518,485)	(25,689,791)	30,778,621	(6,367,611)	212,022
0	237,739	2,897,632	69,889	6,157
(3,518,485)	(25,452,052)	33,676,253	(6,297,722)	218,179
<u>\$199,846,701</u>	<u>\$20,250,178</u>	<u>\$54,192,433</u>	<u>\$8,497,195</u>	<u>\$3,138,466</u>
39,372,716	7,475,385	20,384,528	6,110,422	573,211
<u>35,743,062</u>	<u>7,731,995</u>	<u>21,027,728</u>	<u>5,773,979</u>	<u>575,254</u>
3,629,654	(256,610)	(643,200)	336,443	(2,043)
86,868	181,304	0	26,681	0
2,642,980	0	766,780	619,426	0
0	0	(211,122)	0	(5,036)
0	152,265	138,956	438,373	0
0	0	251,087	0	16,247
0	0	0	0	0
<u>337,488</u>	<u>(5,313)</u>	<u>421,509</u>	<u>0</u>	<u>(14,341)</u>
<u>\$6,696,990</u>	<u>\$71,646</u>	<u>\$724,010</u>	<u>\$1,420,923</u>	<u>\$(5,173)</u>



“Together, transforming the experience of aging.®”

Kendal’s Values and Practices tie the 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 residents, Kendal at Home members and staff members of Kendal share the spirit of community and collaboration and the respect for each individual that flow from Quaker principles.

A Culture of Generosity

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

AFFILIATE FUNDS	FY 2023
Resident Assistance	\$26,418,968
Employee Assistance	\$3,830,327
To Benefit Kendal Community	\$9,263,923
To Benefit Wider Community	\$156,646
Expectancies from CGA’s, Unitrusts & Bequests	<u>\$1,756,851</u>
Total	\$41,426,715
KENDAL CHARITABLE FUNDS (KCF)	
For Kendal Charitable Funds Benefit	\$3,765,689
Expectancies for Affiliate Benefit	\$434,226
Total	<u>\$4,199,915</u>
GRAND TOTAL	\$45,626,630

KCF Corporate Partners: 2023 Appeal



QUALITY INVESTING

THE HAVERFORD TRUST COMPANY



Elijah Tapp speaking at the FSA Annual Meeting.

Kendal Charitable Funds Programs and Support

In 2022, Kendal Charitable Funds announced the Affiliate Grant process and its mission to advance diversity, equity, inclusion and belonging (DEIB) as it relates to workforce challenges. The grant funds, intentionally broad in scope, catalyzed each Affiliate to embrace creative approaches to addressing unique challenges and opportunities on their respective campuses. Throughout 2023, many of the Affiliates utilized the funds to their full potential, which marked an evolution in their goals around DEIB and workforce.

Highlights of the Affiliate Grants

This year, Kendal at Hanover finished a three-part gender awareness series, providing education and understanding for the entire community. The opportunity was identified and organized by the campus's DEIB committee, comprised of residents and staff members. The community shared that it was a relatable and needed topic and provided a critical forum for candid dialogue on an often- misunderstood area.

Another community that advanced DEIB goals this year was Lathrop Community, which made strides in building an understanding of dementia through Virtual Dementia Tours and educated employees and residents on the experiences of the LGBTQ older adult population through a screening of "Gen Silent." The Virtual Dementia Tour is a tool developed by Second Wind Dreams to "build awareness and empathy in individuals caring for people living with dementia." Almost every staff member completed the experience alongside members of the Board and residents. The "Gen Silent" movie screening highlighted the diverse experiences of LGBTQ older adults in the Massachusetts area and opened up dialogue and discussions among the Lathrop campus.

Other Initiatives of Kendal Charitable Funds

In addition to the positive work completed under the Affiliate Grant, Kendal Charitable Funds progressed on the Promising Innovations Grant and the paid Administrator-in-Training (AIT) program hosted at Barclay Friends. The Promising Innovations Fund provides grants to non-profits outside of Kendal who are innovating new programs, projects and solutions that positively impact the lives of older adults in society. Academy of Hope Adult Public Charter School (AoH) was awarded this grant for a two-year period. The grant funding is supporting AoH's Healthcare Career Pathways program, which includes Certified Nursing Assistant training. The grant period ends in December of 2024.

*Diane Massey,
Director, Outreach & Engagement
Interim Executive Director, Kendal Charitable Funds*

Kendal Charitable Funds was also proud to support the Model Quaker-inspired AIT Program that recently concluded at Barclay Friends. Educating the next generation of senior living leaders is a shared goal at Kendal and the aging services sector at large. By joining forces with Barclay Friends and Friends Services Alliance (FSA), another Quaker-rooted and values-aligned organization, Kendal Charitable Funds supported the funding and design of the AIT position at Barclay Friends.

This internship-like experience allowed Elijah Tapp, a rising leader in senior living, to complete on-the-job education in preparation for licensing as a Nursing Home Administrator. The opportunity was made even more unique and meaningful by infusing Quaker values into the learning experience and provided Elijah the opportunity to also experience several other senior living communities within and outside the Kendal System. Barclay Friends, Kendal Charitable Funds and FSA felt strongly this needed to be a paid position, knowing that the young person who would accept the role would be coming out of college and investing six to nine months into the learning experience.

Elijah recently wrapped up his time at Barclay Friends and accepted a position in a senior living community in Chicago to be closer to home.

Looking Forward to Additional Partnerships and Grant Opportunities

The Kendal Charitable Funds Board of Directors is currently examining the potential for future funding related to the Affiliate Grant program and Promising Innovations Fund. In 2024, the Board will again support annual initiatives such as the Alzheimer's Walk — the world's largest event to raise awareness and fight Alzheimer's.

Throughout the year, the Board will continue its thoughtful strategic planning process and determine which funding opportunities will best support Kendal and the broader community.



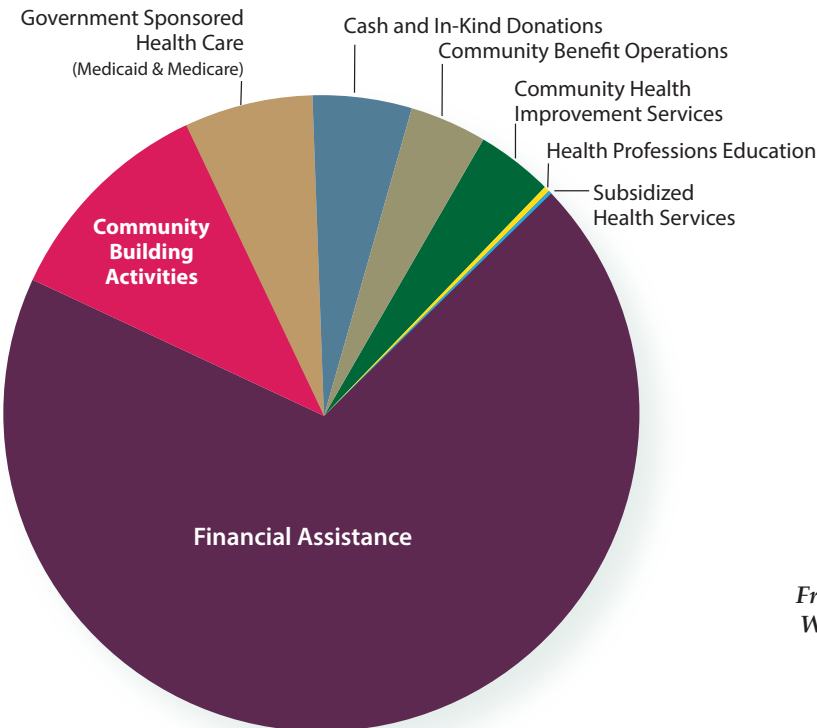
“Kendal Charitable Funds proudly supports Affiliates and is inspired by the collective effort to make a positive impact.”
—Diane Massey

Kendal System 2023 Community Benefit Statistics

COMMUNITY BENEFIT CATEGORIES NET BENEFIT

	Benefit
Community Health Improvement Services Totals	\$124,608
Health Professions Education Totals	\$3,618
Subsidized Health Services Totals	\$1,547
Cash and In-Kind Contributions Totals	\$155,945
Community Building Activities Totals	\$312,449
Community Benefit Operations Totals	\$120,700
Financial Assistance	\$2,171,060
Government Sponsored Health Care	\$225,421

Totals — Including Financial Assistance & Medicaid **\$3,115,348**



The Kendal Corporation Team joined the Barclay Friends Team for the annual Walk to End Alzheimer's in Wilmington, Delaware.



The Kendal Corporation donated over 900 pounds of food during the Food Bank of Delaware's creative annual donation drive event, CAngeineering.



“ She has been an integral part of our team for many years and will be deeply missed.”

— Howard Braxton



Doris Lambert

**Doris Lambert:
September 2023**

Doris retired from her role as a Marketing CRM Specialist after 33 wonderful years working for Kendal, building memories and strong relationships with colleagues, residents, and prospects.

Following several promotions throughout her career at Kendal, she retired as the Marketing Department's CRM Specialist, where she coordinated the transition to various new CRM prospect data management systems and assisted Kendal Affiliates with training, issues and reporting. She was also the very well-organized lead coordinator for the annual Kendal Marketing "Gathering," where Affiliate marketing and sales teams converged to learn and collaborate.

During Doris's journey with Kendal, she witnessed Kendal's growth firsthand and worked tirelessly to ensure the success of new communities. She built long-lasting relationships and impacted the lives of many people. Doris's story is an inspiration to current and future Kendal employees and reminds us of the value of dedication, hard work, and loyalty. Her commitment to the mission and her support of her colleagues have been invaluable throughout the years.

Howard Braxton, SVP of Marketing, Sales and Communications shares, "Don't be surprised if you

Leaders of the Kendal System Retire

get a few tears in your eyes when thinking back on Doris's time with Kendal. She has been an integral part of our team for many years and will be deeply missed. We can't thank Doris enough for her calm and thoughtful dedication and we wish her all the best! So, here's to you Doris — cheers!"

Wanda Whitted-Smith: January 2024

Throughout Kendal, Wanda was known as a courageous promoter of the word "Human" in Human Resources. She made significant contributions to Kendal including the development of countless System-wide policies, helpful procedures, and the transition to new employee management, payroll, and benefits enrollment systems. The termination of the pension plan demanded her experience, knowledge, and true care for the individuals impacted by the change.

Annetha Hall, Chair of Kendal's Board of Directors, shares, "When Wanda joined Kendal, I, myself, had not too long been on the Board. But like everything else I had come to know and love about Kendal, I immediately knew we had hired a winner. And over the following years, in my interactions and experiences with Wanda, she proved my initial feelings were right. If I had to choose a few words to describe Wanda, they would be indefatigable, professional, a master of her craft, a straight-shooter, loyal, focused, and dry-witted."

Notably, in addition to supporting the recruitment process of countless new Kendal employees, she extended her retirement timeline



Wanda Whitted-Smith

to assist the Board of Directors and guide Kendal through an extensive search for The Kendal Corporation's newly appointed CEO, Vassar Byrd.

She is truly valued for her guidance and support to Affiliate Human Resource Directors and Affiliate teams, and is highly regarded by organizational partners and vendors who provide the benefits and other services the Kendal System relies on. Over her ten years with Kendal, Wanda was admired for her vast knowledge of the field, her infectious laugh, respectful directness, and caring support of employees as true individuals.

Barbara Thomas: February 2024

After 32 years leading Kendal at Oberlin, Barbara retired in February of 2024. She began her career with Kendal in 1992, one year before the Oberlin retirement community opened to residents in 1993. In August of 2023, she was recognized by Leading Age Ohio with an award for Visionary Leadership.

Joan Villarreal, Chair of the Kendal at Oberlin Board of Directors, notes "Barbara was an outstanding leader for 30+ years. Inspired by a clear sense of purpose and vision, she encouraged residents and staff of Kendal at Oberlin to grow into a premier community. While we will miss her guidance, we

— continued

“ If I had to choose a few words to describe Wanda, they would be indefatigable, professional, a master of her craft, a straight-shooter, loyal, focused, and dry-witted.”

— Annetha Hall

“Barbara is a pioneer and trailblazer in senior living, and it’s been an honor to work with her.”

— Amy Harrison



Barbara Thomas

wish her the very best in the next exciting phase of her life.”

As Kendal at Oberlin’s CEO, she made significant contributions to the Kendal System, emphasizing the strengths gained by working together in partnership. This includes the founding of the Kendal at Home program, which is now an independent Kendal Affiliate serving members in several states.

“Barbara is a pioneer and trailblazer in senior living, and it’s been an honor to work with her. Throughout her career, Barbara exemplified Kendal values, and her leadership has been inspirational, paving the way for future generations. Barbara’s unwavering dedication, strategic vision, and commitment to excellence have left an indelible mark at Kendal and the entire senior living landscape,” shares Amy Harrison, Kendal CFO.

Linda Sterthous: April 2024

As Executive Director, Linda’s contributions to Barclay Friends have been immeasurable, leading the community through challenging circumstances to successfully build and occupy the Preston building, a new state-of-the-art personal care and memory care community. Under her leadership, Barclay Friends maintained its status as a five-star rated community, recently recognized for its excellence in services throughout Chester County, Pennsylvania.

Linda has been a leader in senior living since the 1970s, holding a range of leadership positions throughout her accomplished career. Linda played an instrumental role in upholding Barclay Friends’ Quaker values of community, peace, integrity and respect for all individuals. Barclay Friends is known for its welcoming and inclusive atmosphere, and Linda’s leadership helped to foster this culture. Linda also made many thoughtful and meaningful contributions to the Kendal System.

“Throughout her time with Barclay Friends, Linda demonstrated her unfailingly positive attitude.”

— Ellen Gilbert



Linda Sterthous

Barclay Friends Board Chair Ellen Gilbert expresses, “Throughout her time with Barclay Friends, Linda demonstrated her unfailingly positive attitude, her ability to think strategically and solve problems, her tenacity in the face of challenges, her ability to lead others, and her wonderful sense of humor.”



Patrick Arguin



Vassar Byrd



Jean Eccleston



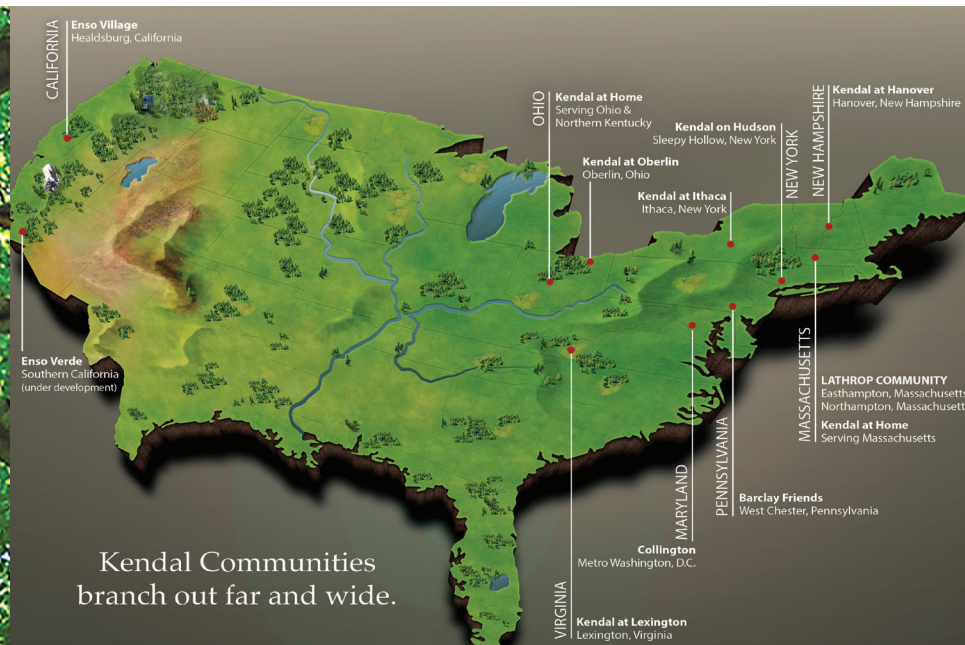
Seth Vilensky



Maria Santangelo

New CEOs Joining The Kendal System

- Patrick Arguin: Lathrop Community — October 2023
- Jean Eccleston: Kendal on Hudson — October 2023
- Vassar Byrd: Kendal — January 2024
- Seth Vilensky: Kendal at Oberlin — January 2024
- Maria Santangelo: Barclay Friends — April 2024



Kendal Leadership

THE KENDAL CORPORATION (as of June 2024)

Jonathan Alessandrini, *IT Security Engineer*

Stephen G. Bailey, *Chief Strategy Officer*

Crystal Baker, *Controller*

Howard Braxton, *Senior Vice President, Marketing, Communications & Sales*

Jessica Buhler, *Director, Communications & Public Relations*

Ben Butler, *Vice President, Development & Special Projects*

Vassar Byrd, *CEO*

Cara Cassner, *Director, Marketing*

Imad Chehab, *Assistant Director, Information Technology*

Kim Dunn, *Director, Talent & Employee Engagement*

Jason Eldridge, *Business Systems Analyst*

Amy Harrison, *Chief Financial Officer*

Doug Helman, *Transition Operations Specialist*

Kimberly Hill, *Office Administrator*

Marquis Hynson, *Marketing Specialist*

Jennifer Karsten, *Governance Advisor*

Diane Massey, *Director, Outreach & Engagement*

Carlos Menendez, *Assistant Director, Information Technology*

Pam Moriarity, *Executive Assistant*

Kurt Rahner, *Vice President, Information Technology*

Angela Rafine, *Senior Human Resources Generalist*

Christian Ramsey, *Director, Operations*

Dan Rock, *Director, Procurement*

Janet Ruggieri, *Financial Analyst*

KENDAL NEW YORK

Vassar Byrd, *CEO*

KENDAL CHARITABLE FUNDS

Diane Massey, *Interim Executive Director*

EXECUTIVE DIRECTOR/CEO OF KENDAL ORGANIZATIONS

Maria Santangelo, *Barclay Friends*

Ann Gillespie, *Collington*

Doug Helman, *Interim, Ensó Village*

Beth Vettori, *Kendal at Hanover*

Lynne Giacobbe, *Kendal at Home*

Laurie Mante, *Kendal at Ithaca*

Jan Bigelow, *Kendal at Lexington*

Seth Velinsky, *Kendal Northern Ohio/*

Kendal at Oberlin

Jean Eccleston, *Kendal on Hudson*

Patrick Arguin, *Lathrop*

RESIDENTS ASSOCIATION PRESIDENT

Jeff Smith, *Barclay Friends (Preston)*

Frank Raezar, *Barclay Friends (Cotter)*

Grae Baxter, *Collington*

Debbie Faigenbaum, Jeanne Ferrante, Val Ohanian

(Exec. Committee), *Ensó Village*

Len Cadwallader, *Kendal at Hanover*

James Hedlund, *Kendal at Ithaca*

Lee Henkel, *Kendal at Lexington*

Rollin Conway, *Kendal at Oberlin*

Hildegard Gray, *Kendal on Hudson*

Kamala Brush, *Lathrop Easthampton*

Chris Hjelt and Elly Rumelt, *Lathrop Northampton*

Kendal Boards

BARCLAY FRIENDS

Tim Boyd
John Braceland
John Cigler
Susan Cusack
Matt Davis
Cendrine Gemberling
August Gerhardt
Ellen Gilbert
Sony John
Jolie Karp
Marianne Pessognelli
Mike Scheuren
Serita Spadoni
John Spangler
Nelson Wicas

COLLINGTON

Alexis Allen-Shorter
Christal Batey
Doreen Bickel
Peter Cochran
Peter Fielding
Dick Garrison
Vikki Kalitsi
Greg Niblett
Adam Osteryoung
Lori Simon-Rusinowitz
Susan Walker
Marsha Voigt

KENDAL AT HANOVER

Nan K. Carroll
Jennifer Casey
Tom Corindia
Judy Csatari
Suzanne Elusorr
Sean M. Gorman
Ruth Lappin
Lisabeth L. Maloney
Nancy Marion
Bridget Mudge
Judson T. Pierson
George Rupp
Eric Shirley
Anant Sundaram

KENDAL AT HOME

Heather Ahearn
Michael Carlin
Edna Chun
Andrew Fauver
Joseph Haubrich
Alan Kolp
Rosa Licea-Mailloux
Francis Martinez
Allen Mix
Mary Picken
Jeff Pollock
Colleen Ryan Mallon

KENDAL AT ITHACA

Charles Ackerman
William "Bill" D. Crane
Peter Dugo
Davina A. Desnoes
Mary Pat Dolan
Judith A. Ehren
Mary Ann Erickson
George P. Ferrari, Jr.
Justina Fetterly
Jeffrey Layton
Joe Mareane
Alan D. Mathios
Susan H. Murphy
Stephen Nunley
Alan Pedersen
Jeffrey Penoyer
Sonia Rucker
Chris Sheppard
Lucy H. Staley
Helen D. Talty
Donald D. Wilson

KENDAL AT LEXINGTON

Priscilla Baker
Elizabeth Branner
George (Merce) Brooke
David Grizzle
Randolph Hare
Michele Hentz
Dianne Herrick
Mark Keeley
Pamela (Pam) Luecke
Bennett Ross
Christopher (Chris) Russell

Karen Russell
Bruce Summers
Natasha (Tasha) Walsh
Harry Warner, Jr.
Linda Wilder

KENDAL AT OBERLIN

Barb Benjamin
Wuu-Shung Chuang
Rollin Conway
Andria Derstine
Tom Konkoly
Betsy Manderen
Annette McIver
Robert Monchein
Scott Moore
Gary Olin
Liz Schultz
Michael Shiferaw
Jack Southworth
Dominique Stecker
Dan Storer
Dan Styer
Tracy Sutherland
Joan Villarreal

ENSÓ VILLAGE

Laura Ferracane
Spencer D. Hamrick Jr.
Dan Hirsch
Paul Kuenstner
Rob Lippincott
Walter Kieser
Gregory W. McClune
Zesho Susan O'Connell
Roy Remer

KENDAL CHARITABLE FUNDS

Dan Churchill
Barbara Freedman
James Greenwood
Jeffrey Harness
Tara Quinn
Richard Schramm
Lee Ann Sullivan
Grace Tompos
Carla Willis

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

Liz Burgess
Rey Carrion
Ruth Ann Clark
Josephine Jones
Tangi McCoy

KENDAL ON HUDSON

Kiran N. Batheja
Jeffrey Brensilver
Victoria Gearity
Bernard (Joe) Lillis
Barry Morris
Adriana Murphy
Ed Napoleon
Howard Permut
Caroline Persell
John Sorice
Lynn Tepper
Samual F. Vieira
Deb Wood

LATHROP

Ruth Constantine
Jack Devlin
Michael Ford
Lisa Halbert
Bill Hogan
Susannah Howe
Larry Hunt
Charles Johnson
Sharon Kletzien
Anne Lanning
Daniel Lesley
Carol Neubert
Marlisa Parker
Mark Peterson

Elaine Reall
Marilyn Richards
Erin Tautznik
Elisabeth Weissbach
Owen Zaret

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Casey Brower
Anna Marie Butrie
Brooke Carroll
Paul Cooney
Annetha Hall
Julie Houpt
Jeff Layton
Jodi Leeser
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Anne Page
Stanley Pelli
Margaret Plank
Howard Smith

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THE KENDAL CORPORATION

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Together, transforming the experience of aging.®

This Annual Report was prepared in direct collaboration with each Affiliate. 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.



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



THE KENDAL CORPORATION

Kendal is a not-for-profit organization headquartered in Newark, Delaware. The Kendal Corporation's role 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*.

The Kendal Corporation does not own any 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 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 Maryland
- LeadingAge Virginia

Collington, Kendal at Hanover, Kendal at Ithaca, Kendal at Lexington, Kendal at Oberlin and Kendal on Hudson are full-service Life Plan Communities accredited by CARF, an international body that accredits organizations aspiring to excellence.

Barclay Friends is 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.