



VISION 2025

We *aspire*
to elevate society's
understanding of what is
POSSIBLE
as we *age.*

LOCATIONS

California (under development)

Enso Village

Illinois

The Admiral at the Lake

Maryland

Collington

Massachusetts

The Lathrop Communities

New Hampshire

Kendal at Hanover

New York

Kendal at Ithaca

Kendal on Hudson

Ohio

Kendal at Oberlin

Kendal at Granville

Kendal at Home (Ohio and growing)

Pennsylvania

Barclay Friends

Chandler Hall

Kendal-Crosslands Communities

Virginia

Kendal at Lexington

FEATURES

NEW OFFERINGS

- 6 | Groundbreaking celebration heralds construction of Preston at Barclay Friends
- 8 | Chandler Hall extends its reach with Hospice at Home
- 13 | Kendal at Granville offers innovative new pricing model
- 16 | Kendal on Hudson partners with Pace University
- 19 | Kendal at Lexington launches \$40 million expansion, renovation project
- 20 | Dimensions of Dementia Focus of Kendal at Oberlin's 25th Anniversary Celebration
- 22 | Plans advance for Zen Inspired Kendal in Northern California

SOCIAL IMPACT

- 5 | The Stars Aligned for this Admiral at the Lake Employee
- 10 | KCC Residents Engage College Students in Multicultural Storytelling Project
- 11 | KCC Residents Honored for ESL Tutoring
- 12 | Kendal at Granville: Nurturing "Model Practices" for Tomorrow's Caregivers
- 14 | EPA recognizes Kendal at Hanover as a Green Power Partner
- 15 | Kendal at Home aims to change the way people think about dementia
- 17 | Kendal at Ithaca residents help advance tech for those with hearing loss
- 21 | Kendal at Oberlin Recognized for Food Rescue Contributions
- 25 | Kendal Joins Effort to Advance Person-Centered Dementia Care

EXCEPTIONAL PEOPLE & PLACES

- 4 | Admiral Director of Nursing Honored for Leadership by LeadingAge
- 9 | Collington Welcomes 2 New Artists in Residence
- 18 | Lathrop—Unique Destination Communities
- 24 | Ann Gillespie named Collington's CEO
- 26 | Marvell Adams Jr. Named Kendal COO
- 30 | Kendal Board Chair inducted into Historic Germantown Hall of Fame
- 31 | Lisa Holloway named Kendal's Health Services VP

2019 ANNUAL REPORT CONTENTS

Chair of the Board and President and CEO Messages
Kendal System Finances

2-3
27-33

Social Impact & Community Benefit
A Culture of Generosity
Kendal Leadership, Boards, Addresses

34-35
36-37
38-40



From the Chair of the Board

Reconsidering what's possible as we age

Americans are living longer and healthier lives, and members of the baby-boom generation have begun questioning old ideas about aging. Instead of seeing the later stages of life as a time to disengage and separate themselves from the wider world, many boomers look forward to finding a new sense of purpose, new experiences and new ways of engaging with society.

That thirst for engagement comes across clearly in this year's Annual Report. As you turn the pages, you'll read about how Kendal communities and residents are redefining what is possible as we age. For example:

- Collaboration between Kendal at Ithaca residents and a startup at Cornell University's eLab Accelerator has transformed headphones intended for denizens of silent discos into a valuable tool for reducing the social isolation resulting from hearing loss.
- When college student Maria Sanchez took a part-time job at The Admiral at the Lake to help pay for her education, you might say she hit the trifecta—tuition reimbursement, a scholarship and a mentor in her field of study.

- Working closely with senior living experts, Kendal at Granville developed an innovative and flexible new pricing model designed to provide exactly the level of long-term care coverage that is right for each person.
- Kendal on Hudson residents reached out to Pace University's president, an initiative that led to a formal partnership agreement that allows residents to attend classes and events on Pace campuses and gives students opportunities to explore careers, meet mentors and more at Kendal on Hudson.
- Kendal at Home staff have been trained as Dementia Champions, which equips them to recognize the signs of dementia, improve the quality of life for those with dementia and train family and community members to do the same and become Dementia Friends.
- Kendal at Hanover has been recognized by the U.S. Environmental Protection Agency for its commitment to using renewable energy.
- Kendal at Oberlin's Hospitality Services kitchen staff received Oberlin Community Services' Silver Spoon Award for outstanding contributions to OCS's Food Rescue program. Working with a few local organizations, including Kendal at Oberlin and Oberlin College, OCS created the Food Rescue program in 2018 to repurpose and redirect leftover food to those who might otherwise go hungry.
- Residents of Kendal-Crosslands Communities have been honored for volunteering to help immigrants learn English. More than 100 residents have served as tutors through the local English as a Second Language program.

These are but a few examples of innovative ways that Kendal communities and residents are reshaping our understanding of what's possible as we age.

Joan Countryman, Chair
The Kendal Corporation Board of Directors



From the President and CEO

Inspiration

For our annual report this year we are reflecting together on what's possible in our own lives and everyone else's as we get older. To that end, the theme of our 2019 Annual Report is "We Aspire to Elevate Society's Understanding of What is Possible as We Age."

As I reflect on the world around me, I feel so fortunate to be surrounded by the many stories that run across all ages within and around Kendal. While the world around us sometimes seems to be "wringing its hands" over changing demographics—it too often indicates a declinist view of getting older, and can ignore the wonder of "what may be."

I think we are lucky and even enlightened in knowing so much of what's possible, to have the capacity to notice so many incredible things, to bear witness to the "light" in every person and to shout from the rooftops the "wonder" we see. To know that we might each be some small part of that wonder in any aspect of any person within the

larger Kendal family is an honor. Increasingly, we feel compelled, even obligated to speak to what we see.

The stories shared in this Annual Report remind us to "not judge books by their covers" and for me, they all add to a reservoir that is brimming over with stories and sensibilities from which I take inspiration.

Kendal is seeing many new offerings around its System. From groundbreaking on a new Personal Care building at Barclay Friends to new independent living and creative new offerings for individuals suffering from Alzheimer's and dementia-related illnesses at Chandler Hall, Kendal at Lexington, Kendal at Oberlin and Kendal at Home.

Kendal affiliates are also changing their local communities through efforts that have Social Impact. Their efforts include helping to support the professional growth of Kendal staff, offering life-changing internship programs and live-in opportunities for students around the country that create connections to residents and opportunities for shared experiences that exceed the expectations of not only the students, but residents as well.

Finally, we are excited in this year's annual report to share stories of some exceptional individuals who have been recognized by the wider world and bring a wealth of experience and new ideas to Kendal.

Best,

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

Sean Kelly
President and CEO
The Kendal Corporation



The Admiral's Director of Nursing Honored for Long-Term Care Leadership

LeadingAge presented its 2018 Joan Anne McHugh Award for Leadership in Long-Term Services and Supports Nursing to Angela Jalloh, RN, The Admiral at the Lake's Director of Nursing. As DON, Angela oversees nursing staff and resident care at The Harbors, the community's skilled nursing and assisted living setting.

Angela received the award at LeadingAge's annual national meeting and conference in Philadelphia Sunday, Oct. 28. In addition to the award, she received a \$1,000 prize to be used for professional development at The Admiral.

Angela has earned a reputation for coaching, mentoring and educating team members so they feel accomplished and competent. She's been credited with changing the employee culture at The Admiral by setting a high bar for staff achievement while, at the same time, offering to help team members meet or exceed that bar. She's also modeled success in this area for other leadership team members.

"From the day Angela joined this community in March of 2017, her character, integrity, humor, grit and leadership have shined, and we are fortunate to have her as a member of this team," CEO Nadia Geigler noted in a letter announcing the award to Admiral residents, staff and board members.

"My motivation is to shift the way nursing interacts with residents and to incorporate each resident's preference, perspective, background and opinions into daily care," Angela says.

The McHugh Leadership Award "recognizes a Director of Nursing or Assistant Director of Nursing who creates a supportive and engaged workplace environment by displaying excellent leadership skills while managing nursing and front-line staff."

Angela is known for her willingness to support and make accommodation for any team member who is experiencing an emergency or going through a difficult time. That willingness has had an impact on retention rates, according to care partners who welcome Angela's willingness to listen to their feedback, involve them in decision making and make changes to accommodate their needs.

Care partners describe Angela as someone with a caring and approachable character who doesn't hesitate to jump in and share caregiving responsibilities when her team needs help. They praise Angela for involving them in care planning meetings, and for implementing a meal voucher program for team members who agree to cover an extra shift on their days off.

Angela has also succeeded in breaking down silos at The Admiral by encouraging team members to support other departments by floating from one level of living to another when the need arises. Following this practice, The Admiral has not used agency staff, and its staffing has stabilized, since Angela became DON in 2017.

Angela has worked in many capacities in long-term care. While a certified nursing assistant (CNA), she began her nursing education, eventually becoming licensed as a practical nurse (LPN) and a registered nurse (RN) and then earning a bachelor's degree in nursing. Before coming to The Admiral at the Lake, Angela served in another long-term care community for three years as Assistant Director of Nursing. She also worked as a college nursing instructor for two years.



The Stars Aligned for Maria Sanchez

When college student Maria Sanchez took a part-time job at The Admiral at the Lake to help pay for her education, you might say she hit the trifecta—tuition reimbursement, a scholarship and a mentor in her field of study.

Maria moved to the north side of Chicago during the second semester of her sophomore year at Roosevelt University, and she was happy to find a job nearby at The Admiral. Taking a combination of morning classes and online courses allows Maria to work five or six afternoons a week as a server.

Little did Maria know that she would be one of the first five beneficiaries of the new Admiral Education Assistance Program (AEAP).

"This is the first time in The Admiral's history that we've been able to do this as an employer, by using dollars set aside in our operating budget, and as a community, using funds raised by residents, staff and Board members," says Admiral CEO Nadia Geigler. "The support given to staff who applied and met the criteria for the program is intended to help reimburse them for tuition, as well as other education-related expenses, such as books, lab fees, technology and transportation."

What's more, when Maria applied for an AEAP award, she learned she was eligible for a Roosevelt University scholarship funded by Admiral residents Richard and Marjorie Ettlinger.

"It was a wonderful coincidence," says Bruce Rigdon, the resident who chairs the AEAP. "Before we had even received Education Assistance Program applications, one of the members of our committee told us that she and her husband had established a scholarship at Roosevelt University. When we discovered that Maria was actually attending Roosevelt, we got in touch with the University to see

whether the Ettlinger scholarship could be given to her. So, she received our education assistance award and the scholarship at Roosevelt."

Richard Ettlinger, who graduated from Roosevelt University in 1948 with a bachelor's degree in political science, and his wife, Marjorie, have long been supporters of Roosevelt University, its values and its mission. In 1998, the couple established the Marjorie N. and Richard L. Ettlinger Endowed Scholarship to "provide annual scholarships to inner-city undergraduate students attending Roosevelt's downtown Chicago campus."

"I worked the day after I found out I got the scholarship, so I made sure I was able to thank them personally," Maria says. "When I saw Marjorie Ettlinger, I hugged her and said, 'Thank you so much for this opportunity. You don't really know me, but you and your husband have given me a chance to continue my education.'"

Maria is majoring in both psychology and criminal justice and plans to get a master's degree and her doctorate in clinical psychology with a concentration in forensics. She currently is engaged in the McNair Scholars Program, a federally funded initiative that prepares low-income, first-generation and/or other underrepresented students to successfully navigate a path to a doctorate. McNair students benefit from a mentoring program, summer research programs and presenting research at professional conferences.

Maria says that another Admiral resident, Dr. David Rosenthal, who is still a practicing psychologist, has become a mentor to her. "Dr. Rosenthal has been a really big inspiration for me," Maria says. "All of the residents have been very, very supportive, and I'm very thankful to be part of The Admiral community."



Groundbreaking celebration heralds construction of Preston at Barclay Friends

"We are here today because so many have helped us to arrive at this moment," said Linda Sterthous, Barclay Friends' Executive Director, May 1 surrounded by neighbors, staff and more than a half dozen dignitaries from West Chester Borough and Chester County, Pennsylvania. "There are so many to thank, I would miss someone if I tried to name them all. So, just let me say 'Thank you' to all of you who have helped us get to this day. We are eternally grateful."

Since fire destroyed the Woolman building in November 2017, Barclay Friends has been on a journey to build a new residential living and personal care residence for older adults in need of care and support.

Excavation in preparation for the construction of a new building where the Woolman Building once stood began the week of April 8. Named Preston, after 19th-century Quaker physician Ann Preston, this state-of-the-art building will offer residents spacious apartments, a wide range of activities and quality health care services in a modern setting.

Preston will have 60 apartments, including 20 apartments for residents in need of secure memory care. The look and feel of Preston will be intimate, with small "neighborhoods," or clusters of rooms, to help residents feel more at-home and comfortable. The layout will afford opportunities to enjoy natural light in the building, and residents will have easy access to gardens in the back of the property, where they can walk, spend time outside and garden.

Preston will be constructed from steel and concrete. The exterior will feature brick, stone and siding known for its attractiveness, as well as durability and flame-retardant properties. Warfel Construction is building the 61,000 square-foot project, designed in collaboration by Bernardon and SFCS. Plans currently

call for completion of construction early in 2020.

"We all know the past year and a half has been challenging for Barclay Friends and for our community," West Chester Mayor Dianne Herrin said. "But I've been so impressed because the board and the administrators of Barclay Friends have pushed forward with an incredible vision and an undying commitment to its residents and their families. And what they have done has been reflective of the Quaker tradition. They have done so with integrity, with a strong sense of community and with a great sense of stewardship."

In her comments at the groundbreaking celebration Elizabeth Guman, Barclay Friends Board Chair, included this quote from author Julia Alvarez: "In some ways we become brave, almost by accident. Something happens and we respond to that challenge courageously and compassionately. But really all along the way to that something big is happening, we've been cultivating a compassionate heart."

"Today, we honor the residents, volunteers, staff, Board members, neighbors and community members who came together to live out this work of creating a compassionate heart for the amazing and beautiful people who are the older adults in our community," Guman said. "So, on behalf of the board, thank you for being part of this moment and standing with us today."

"This is the beginning of a new era for Barclay Friends, to be sure," said Kendal President and CEO Sean Kelly. "Getting to this place, right here, right now, is a story that wants to be told over and over again. I am honored to be a part of this conversation and a part of this group—and I'm just thrilled for what is to come."

To learn more or to request information about wait lists, call Faith Woodward at (610) 918-3432.



SKETCH OF PRESTON
OPENING SPRING 2020



Chandler Hall extends its reach with Hospice at Home

When her husband, Bob, had a serious stroke in August 2016 at age 79, Catherine McDaniel was devastated.

"It was a very bad stroke," Catherine says. "His whole left side and his cognitive abilities were affected." It was the first major health problem he had ever had, she recalls.

After he was treated and began rehabilitation at St. Mary Medical Center in Langhorne, Pennsylvania, Bob was discharged to Chandler Hall in Newtown to continue his rehabilitation and receive skilled nursing care.

"The care partners there grew to love Bob. They were kind and caring," Catherine says.

When his health began to fail in March 2018, Bob received palliative care while being rehabilitated in Chandler Hall's nursing home. When Bob and his family were ready, he switched to Chandler Hall's Hospice at Home care. During the last week of his life, Bob was in the Heacock Hospice Pavilion, where Catherine could stay with him overnight. He passed March 19.

Chandler Hall's Hospice and Palliative Care programs provide support and care for patients nearing the end of life and for those dealing with advanced illnesses—including congestive heart failure, ALS, Parkinson's disease, COPD, cancer and Alzheimer's disease.

"We are able to help patients who desire different treatments to keep them comfortable longer, both here at Chandler Hall and in their homes," says Patty Bevlock, Senior Director of Hospice and Palliative Care. "Decisions on care are patient-focused."

Catherine McDaniel wanted her husband to be cared for at Chandler Hall, she said, because her father, George Giampetro, had done so well when he moved in 2011 to an apartment there at age 95. He was able to do most things for himself, including his own laundry, up until three months before his death at 97. That's when George moved to Chandler Hall's Heacock Hospice Pavilion.

Before he died, George said he wanted to be in "My Place" again, so he moved back to his apartment at Chandler Hall, where he received Hospice at Home care. Hospice care allows a terminal illness to take its course while providing the patient with dignity, respect and freedom from pain.

Since her husband died in March 2018, Catherine has found solace and companionship through one of Chandler Hall's bereavement support groups. "I came to them shortly after Bob died, and about 10 of us still meet twice a month," Catherine says. "This wonderful group helps me because we're all in the same situation."



Catherine McDaniel (right) with her daughter Patricia Curry, Chandler Hall's Admissions and Marketing Manager. Catherine engages nursing home residents in activities two or three afternoons a week as a volunteer.



Collington Welcomes 2 New Artists in Residence

In partnership with the University of Maryland School of Music (SOM), Collington is hosting two new graduate students as its 2018-19 Artists in Residence. Melissa Morales and Ria Yang moved in with residents at the retirement community in September and scheduled student and faculty groups to perform and speak at Collington.

In exchange for room and board, the two students perform regularly scheduled concerts, teach educational programs and collaborate with residents. A committee of Collingtonians coordinates with Melissa and Ria on opportunities to collaborate for the community choir, jazz ensemble, The Collington Kats and Sunday afternoon concert series.

NBC-TV's May 13 edition of the TODAY show featured Collington's two new artists in residence in a story titled "How 2 young musicians are living in perfect harmony with seniors."

Collington residents bid a fond adieu in August to Collington's first Artists in Residence, cellist Samantha Flores and clarinetist Matthew Rynes. During their tenure, a feature article in The New York Times—titled "Fostering Connections Between Young and Old"—cited the Artists in Residence Program at Collington an innovative example of a mutually beneficial program bringing generations together.

Melissa Morales is an accomplished clarinetist who has been playing her instrument for more than 18 years. Her interest in music began with singing in a choir in her hometown near New Orleans. She graduated from Louisiana State with a bachelor's degree in music education and then earned a graduate degree in clarinet performance from DePaul University in Chicago.

Melissa said she was most looking forward to becoming a part of the community and finding the

right "rhythm" with the residents. She especially enjoys performing music by major American composers, including Aaron Copland, Leonard Bernstein and recently, William Thomas McKinley.

Ria Yang, who hails from Quanzhou in southeast China, has lived in the United States since 2011. Her native tongue is Mandarin, and Ria continues to work on mastering English. The skilled pianist has been playing for 17 years and said she is thrilled to be living in a studio apartment at Collington. "Music brings me great joy, is pure to me and cures whatever is ailing me," she said.

Ria has a master's degree in music, with a specialty in piano performance, from Northern Illinois University and is currently working toward a master's degree in collaborative piano at SOM. She plans to eventually return to China to perform and teach, but in the meantime, she wants to fine tune her classical music skills along with jazz artistry.



KCC Residents Engage College Students in Multicultural Storytelling Project

Everyone loves a good story—whether it be told through a good book, a movie, a theatrical performance or around a campfire. But what about in retirement with a cast that is both intergenerational and multicultural? That is what Kendal at Longwood residents on its Intergenerational Initiatives Committee set out to do: To tell good stories, but to perhaps even more so, to make everlasting friendships and improve their communities.

The residents based their initiative on Narrative4, an international story exchange model, created in 2011 by Irish author Colum McCann and his colleague, Lisa Consiglio. Narrative4 is designed to bring together people who would normally not talk to one another. The objectives are to bridge divides, create empathy and understanding and turn that into action to improve their communities through storytelling and fellowship.

With funding provided by a Kendal Charitable Funds Grant, Committee member and resident Andrea Taylor traveled to New York in September 2018 to be trained as a Narrative4 facilitator. Along with fellow resident and committee chair Betty Warner and Lincoln University faculty member Marilyn Button, they led a group of resident volunteers and students from nearby Lincoln University, a historically black university, through a transformative experience.

At first, several gatherings took place with the residents and the students to allow them to get to know one another, build trust and to learn more about each other. Dinners, tours of the Kendal and Lincoln campuses, ice-breaker exercises, excursions and other shared activities culminated in the actual story exchange in mid-March.

"It was exciting to see the relationships that

developed, the trust between the students and residents, and the mutual learning that took place. I am moved when I think about it," Taylor said.

The finale of the project was a performance in April at Kendal at Longwood by the students to celebrate their journey and their new friendships. The story exchange project opened my heart to being more vulnerable while teaching me how to be more empathetic," Essence Hayes, a participating Lincoln University student said in summing-up the experience.

"We see this project as a vehicle that could further establish Kendal as a leader in transforming the role of older adults in their communities," Warner said. "There is potential for widespread outreach using this model not only in our local community but in other senior communities, organizations, intergenerational activities and more."

KCC residents honored for ESL tutoring

Residents of Kendal-Crosslands Communities have been recognized for the hundreds of hours they have volunteered to help Kennett Square, Pennsylvania-area immigrants learn to speak English.

In conjunction with Kennett Square's annual Cinco de Mayo celebration, Casa Guanajuato presented an award to KCC residents for their dedication to giving back to the broader community over many years through the local Adult Literacy Program as tutors with the English as a Second Language (ESL) program.

"This program has not only enriched countless individuals' lives over the years, it has changed their lives forever, enabling them to communicate in English," said Casa Guanajuato President Kathleen Snyder. KCC resident Betty Warner, who helped recruit residents as ESL volunteers, accepted the award on behalf of the tutors.

"At the moment, we have about 50 tutors from the four KCC communities (Kendal at Longwood, Crosslands, Coniston, and Cartmel)," Warner said. The first ESL tutor training at KCC began in January 2016, with the goal of training 5-10 residents.

However, the response from KCC residents was so overwhelming that more than 100 residents have been trained, and at least 30 new volunteers are recruited each year.

"Many of the students remain in touch with their tutors. Even if they no longer need tutoring, the bonds which form are substantial," Warner said, "and residents enjoy the weekly discussions with their students."

Casa Guanajuato also presented an award to Filomena Elliott, director of the Adult Literacy Program, which provides free instruction to community adults to improve the literacy of the educationally disadvantaged to levels of proficiency needed to function well on the job, in the family and in society.

"Our ALP students have a strong desire to learn English. They wish to better themselves, to communicate with the teachers and doctors of their children, and to advance to more desirable careers," Elliott said.



Betty Warner, a resident at Kendal at Longwood, and Filomena Elliott, Director of the Adult Literacy Program.

Kendal at Granville: Nurturing 'Model Practices' for Tomorrow's Caregivers

Training the next generation of caregivers is both art and science. As the only Life Plan community in Licking County, Ohio, Kendal at Granville provides an important community benefit: serving as a clinical site for the professional training and development of future nurses, many of whom will help care for older adults living in the region.

Baby boomers are redefining aging while simultaneously increasing the percentage of Americans identified as older adults. Those who are ready and willing to work with residents in assisted living or skilled care centers should understand current model practices for nursing care—and what better way to learn than from health care experts like Kendal at Granville's professionals.

Since the Health Center expansion in 2014, nursing students from both Central Ohio Technical College (COTC) and Knox Technical Center have come to Kendal at Granville to gain clinical experience. Practical nurses must complete a one-year course

that includes three 12-week semesters of clinicals. Students typically come in groups of eight to 10, one day a week for seven hours.

Kendal at Granville typically supports two groups of students: one during the day shift and another on second shift. COTC has placed Licensed Practical Nursing (LPN) students, as well as some Registered Nursing (RN) students, to practice basic nursing skills, including completing assessments, checking vital signs, changing dressings, giving injections and passing medications.

The nurse training program is an excellent example of putting into everyday practice one of Kendal's core values: promoting "an environment of continuous learning" for staff and residents. Health Center staff clearly enjoy mentoring the nursing students and appreciate the additional help they provide in caring for residents.

"I want to be a nurse because I have a heart for giving back and being able to help other people,"

says Navaria Boswell, a second-semester LPN student on-site with the COTC program. Jeff Mathis, RN, a full-time COTC nursing instructor and an as-needed Kendal at Granville employee, echoes Boswell's sentiments.

"These students are already working in health care, and they are seeking more education because they have a heart for people, not for the love of money!" Mathis says. "I enjoy training new nurses the proper way. I explain the 'why' of what we do so that they hopefully understand not just the skill that is required, but the reason behind the skill."

While nursing students benefit from gaining hands-on experience at Kendal at Granville, it also helps the Health Center recruit well-qualified staff. Bringing nursing students on-site gives them an opportunity to see the high quality of care provided at Kendal at Granville, and upon graduation many of these students will apply for jobs there.





Kendal at Granville offers innovative new pricing model

Kendal at Granville now offers an innovative and flexible new pricing model designed to match the unique needs and preferences of individuals seeking to get a plan in place for their 'Third Thirty.' Working closely with senior living experts, Kendal at Granville was able to simplify its pricing model and provide exactly the level of long-term care coverage that is right for each person.

"As a Life Plan Community, we have offered many options, including special pricing from time to time based on feedback from people interested in living here," says Doug Helman, Executive Director of Kendal at Granville. "While having many options was our goal, the result was a lot of confusion; people tried to time their move to when there was an incentive, rather than moving when it worked best for them."

The new model provides simplified pricing and flexibility, and past incentives were folded into the new pricing so there won't be any other "special pricing" in the future—the special price is the new program.

"We started by listening to potential residents to understand what they are seeking, and we engaged experts to help design a plan that is right for everyone," says Angie Jordan, Director of Sales and Marketing.

The new pricing model is simple, innovative and provides exactly the level of future long-term coverage that is desired. Prospective residents love the simplicity of a base plan with optional add-on packages related to health care coverage and estate planning. It comes down to just a few simple questions:

Do you want to live in a large cottage with beautiful views of woods and hills, while having access to future care at a stabilized and predictable price? If so, the Life Care Plan is for you. It provides unlimited access to long-term care in either assisted living or skilled nursing care, plus potential tax advantages.

Or do you already have long-term care insurance and don't want to pay twice for this benefit? In that case, you might prefer the Continuing Care Plan. It includes preferred access to long-term care, with 100 days of inpatient care in either assisted living or skilled nursing care at 25 percent off the daily rate.

Or maybe you would prefer an apartment that allows you to downsize a little, but you also want a refundable entrance fee option, so you can leave something to your estate? In that case the various options for independent living home sizes and the entrance fee refundability allow individuals to tailor their contract choices.

The new pricing model has really intrigued many and reignited conversations with individuals who now see these new options as a way to personalize their plan for the future. "Whatever fits their lifestyle, we have a plan for them!" Jordan says.

EPA recognizes Kendal at Hanover as a Green Power Partner

Kendal at Hanover has once again been recognized by the U.S. Environmental Protection Agency for its commitment to using renewable energy.

“Kendal at Hanover remains committed to purchasing only 100% green electric power,” says Dean Sorenson, Director of Facilities. “That means all electricity consumed on this property comes from renewable energy sources, like solar and wind.”

The EPA first recognized Kendal at Hanover as a Green Power Partner in April 2014 through its renewable energy certificate program. “These organizations are helping to support the development of new renewable generation capacity nationwide, while also helping to protect the environment,” the EPA states. “Using green power is an easy and effective way to reduce the environmental impacts of your electricity use.”

Sorenson says that Kendal at Hanover’s purchase over the past year of 5,582 megawatt-hours of green electricity had a beneficial environmental impact similar to:

- Growing 98,695 trees per year for 10 years, or
- Taking 811 cars off the road for one year, or
- Not using 8,952 barrels of oil.

The EPA also has recognized the town of Hanover, New Hampshire, as a Green Power Partner for its efforts to reduce the risk of climate change through the use of 100% green electricity from renewable resources such as solar, wind, geothermal, eligible biomass and low-impact hydroelectric generation.

Sorenson notes there are many ways we can all help save energy at work and home:

- Turn off appliances not in use (dryers, washers, ovens, stoves...).
- Turn off the lights when you leave the room.
- Use the stairs instead of the elevator.
- Ride share, use the bus or drive a high-miles-per-gallon vehicle.
- RECYCLE—paper/cardboard/plastic/steel cans/aluminum cans.
- Use a clothesline to dry cloths—weather permitting.
- Unplug power-hungry wall chargers—electronic devices are no. 1 in power consumption increases.
- Close the shades to a room or corridor to keep sun from heating the building to save on air conditioning costs.



Kendal at Home aims to change the way people think about dementia

Staff become Dementia Champions to help improve the lives of those living with dementia

Everyone knows someone living with dementia. People with dementia can live fulfilling lives with the help of their communities and caregivers. But because not many people know how to spot the signs of dementia or how to make him or her feel included, people with dementia are often left feeling isolated.

To help communities throughout Ohio better understand dementia and improve the quality of life for those living with the disease, the staff of Kendal at Home have been trained as Dementia Champions. The Ohio Council for Cognitive Health provides Dementia Champions training as part of its Dementia Friends initiative.

Dementia Friends is a global movement aimed at reducing the stigma associated with dementia. It focuses on five key messages:

- Dementia is not a normal part of aging. Not everyone who grows old will develop dementia.
- Dementia is caused by diseases of the brain. The most common is Alzheimer's.
- Dementia is not just about having memory problems. It can affect thinking, communication and doing everyday tasks.

- It is possible to have a good quality of life with dementia.
- There's more to the person than their dementia. People with dementia are a valuable part of the community.

As Dementia Champions, Kendal at Home staff are equipped to recognize the signs of dementia, improve the quality of life for those with dementia, and train family and community members to do the same and become Dementia Friends.

"Many older adults worry about developing dementia," said Lynne Giacobbe, Executive Director of Kendal at Home. "By becoming Dementia Champions, we are not only able to better educate our members about this disease, but we can also help break the stigma that comes with dementia in the communities we serve."

"What Kendal at Home is doing by embracing this program is ensuring people are able to age in their community as opposed to being isolated in their homes, and that is really important," said Bonnie Burman, president of the Ohio Council for Cognitive Health. "What the staff is saying by becoming Dementia Champions is 'You don't have to be a professional to improve the lives of those with dementia.' That's really inspiring to me."



Kendal on Hudson partners with Pace University

Reciprocal opportunities available to Kendal residents, students

In January Kendal on Hudson announced it has entered into a formal partnership with Pace University, a private university with campuses in Lower Manhattan and Westchester County, New York. The partnership will allow residents to attend classes and events on Pace campuses, and give students opportunities to explore careers, meet mentors and more.

The agreement reflects the commitment of Kendal communities to “promote an environment of lifelong learning.” Expanding Kendal on Hudson’s engagement with this leading institution of higher education will allow residents to pursue their interests as part of the vibrant Pace University community, opening new avenues for education of all kinds.

Thanks to the new partnership, residents of Kendal on Hudson will have access to one class per semester, athletic events and discounted admission to performances at Pace’s Schimmel Center in New York City. Kendal on Hudson will also have access to some of Pace’s New York City spaces for offsite marketing events. In return, Pace students will receive mentoring from residents and staff, career exploration and internship opportunities.

“At Pace University, we’re proud to be part of the Westchester community and we’re excited to build this relationship with our neighbors at Kendal on Hudson,” said Marvin Krislov, President of Pace. “We specialize in giving our students a hands-on, real-world education, so we welcome the internship and mentoring opportunities at Kendal. More than that, we’re happy to welcome the accomplished academics, entrepreneurs and professionals who live at Kendal into our classrooms, adding their perspectives and

enriching the academic experience for our students.”

Partnership discussions began in April 2018 when Kendal on Hudson residents reached out to Pace University’s president. This kicked off an initial partnership with the community accepting interns from Pace’s Health Policy and Advocacy Program, as well as nursing students from the Lienhard School of Nursing in Pace’s College of Health Professions.

The partnership is a testament to Kendal on Hudson residents, who spearheaded the initiative, and whose hard work and dedication paid off. Leading up to the announcement of this deepening partnership, President Krislov visited Kendal on Hudson on Jan. 28.



Sean Kelly, Kendal’s President and CEO; Fran Kelly, Kendal on Hudson Resident and Chair of the Education Committee; and Marvin Krislov, President of Pace University.

Kendal at Ithaca residents help advance tech for those with hearing loss

Imagine a headset designed for dancing the night away in private bliss enabling someone with hearing loss to participate fully in conversation, debate and entertainment.

Collaboration between Kendal at Ithaca residents and a startup at Cornell University's eLab Accelerator has transformed headphones intended for denizens of silent discos into a valuable tool for reducing the social isolation resulting from hearing loss.

Eversound introduced the headphones to a group of Kendal at Ithaca residents, who were hearing-challenged themselves or interested in addressing the problem so they could better engage with their friends. Studies have shown that 80% of older adults experience hearing loss by age 85. When the wireless headphone system was tested at Kendal at Ithaca, the results changed Eversound's marketing focus from providing private entertainment for young adults to enhancing hearing for residents of senior living communities.

Jake Reisch, Eversound co-founder and CEO, recalled a 96-year old resident, Verne Rockcastle, who had been attending social gatherings in his assisted living neighborhood at Kendal at Ithaca but didn't seem engaged. Rockcastle was basically sitting in silence—then he put on a set of Eversound headphones.

"Verne comes up to us after the event, looks at us with a big grin and says, 'This is the first time I've been able to hear clearly—every word—in seven years,'" Reisch reported. "That was kind of the moment when we were like, 'Holy crap, let's get to work.'"

Kendal at Ithaca residents were enthusiastic adopters of the early system

and provided feedback that helped guide product development. Movies, lectures and concerts are now better heard and enjoyed in the Eversound-system-equipped rooms at Kendal.

Eversound partners Reisch and Matt Reiners were named New England's Young Entrepreneurs of 2016 by the U.S. Small Business Administration, and in February 2019, Eversound raised \$5 million to expand. Residents of more than 500 senior living communities now have access to Eversound technology.

Eversound has moved to new offices in downtown Boston, and, in a nod to two key persons who "influenced the Company and made this space possible," they have named conference rooms for Kendal at Ithaca residents Verne Rockcastle, who died in 2015, and Jim Stouffer.



Lathrop—Unique Destination Communities

Some may well wonder why nearly half of all of the residents of the Lathrop Communities in Northampton and Easthampton, Massachusetts, move from all around the U.S.

Why did an artist from Taos, New Mexico, a former Peace Corp Director living in Oregon, a long-time resident of Brooklyn, New York, and others from California to Maine relocate to a small, but unique community in the Pioneer Valley of western Massachusetts?

Others may be surprised to see that older people here are vigorously pursuing ongoing education, learning and discourse. Or to see them actively getting to work on important causes beyond themselves as individuals by combining an activist mentality with the planning and physical work that goes into protecting and enhancing the environment one acre at a time. This may be beyond what the world would generally expect, but it is the truth of this special Kendal community.

Many Lathrop residents come to live near, but not with, family, while others wish to take advantage of being close to five famed local colleges with a plethora of stimulating intellectual and cultural offerings. According to the September 2018 issue of *Yankee Magazine*, the Pioneer Valley is “awash in arts and culture...it’s college town charm, cranked up to 11. Here stunning foliage and panorama-laden hikes come with a side of indie music, film screenings, book readings, and to keep it all humming, artisanal coffee.”

There are many reasons why Lathrop Communities reached 100% occupancy in 2018. Residents take advantage of opportunities to pursue their passions

for art, music, gardening, and healthy living while nurturing deep friendships and being of service to others. Kendal’s Quaker-based values encourage us to lead lives of real meaning “in community.” Residents are free to be their true selves—no matter who they are or who they love, and to share their voices, talents, knowledge and passions with caring neighbors and the larger community.

Many residents volunteer for local nonprofits, such as food banks and cancer centers, and by mentoring school children, supporting local arts groups or local social activist efforts for climate change, world peace and other worthy causes. Others participate in peer-led seminars and workshops offered by the Five College Learning in Retirement program.

Classes hosted at Lathrop and other locations are designed to engage active learners who wish to expand their knowledge, grow and evolve in later life. Some residents audit classes at nearby Smith College, or go to concerts, dance performances, flower shows and other happenings. The benefit of interactions between Lathrop, the colleges and local organizations flow in both directions, with residents leading as well as attending these life-enriching activities.

As a unique destination community, new residents from points near and far experience an incredibly rich, welcoming and friendly environment where all residents are free to be who they are and to continue along their individual paths while sharing the benefits of living “in community.”



Kendal at Lexington launches \$40 million expansion, renovation project

Kendal at Lexington broke ground in February 2018 on a long-awaited \$40 million improvement project that will provide person-centered care enhancements to the only not-for-profit skilled nursing care community in the region. The Phase III project will also create 30 new independent living cottages on the Sunrise Ridge area of the campus.

During the two years of construction, Kendal at Lexington's campus will evolve to include a newly renovated Borden Health Center and Webster Assisted Living Center, an expanded Anderson Dining room and 30 more independent living cottages.

Borden and Webster will continue to serve the greater Rockbridge County, Virginia, community, as well as Kendal at Lexington's residents during the renovation. Renovations to the health care centers will make life brighter and more homelike for residents and more accommodating for those with cognitive impairments, while providing staff with an enhanced workplace.

Borden Health Center

Kendal at Lexington serves the entire Lexington and Rockbridge community through the Borden Health Center, a top-rated skilled nursing community. More than 80% of Borden's admissions are from the general community, and the remaining 20% are Kendal at

Lexington residents. About 40% of those residing in the Borden Center are supported by Medicaid. The renovation project will make the Borden Center the most up-to-date skilled care community in the region.

Webster Assisted Living

The Webster Center is designed for residents who need some assistance with meals, medication, dressing and other activities of daily living and who benefit from the supervision of staff 24 hours a day. Like the renovations in the Borden Health Center, Webster is receiving an upgrade to increase the neighborhood community feel, enhance access to natural light and beautiful gardens and remove structural obstacles to model residential care.

Sunrise Ridge Cottages

Thirty new cottages are also coming to Kendal at Lexington. This will increase the number of residential living opportunities by 25%. Kendal at Lexington's 120 existing independent living residences are fully occupied, and a long waiting list of prospective residents has formed. The new cottages on Sunrise Ridge will be an attractive addition to the Lexington community and their setting has been carefully planned. As of this writing, all 30 of the planned cottages have been reserved.

Dimensions of Dementia Focus of Kendal at Oberlin's 25th Anniversary Celebration

Kendal at Oberlin residents and staff spent the year in anniversary mode. "Celebrate the past—Welcome the future" was the theme of its 25th anniversary and Kendal at Oberlin's 2018 calendar was filled with art exhibits, lectures, concerts and other activities to mark the special occasion.

As part of its yearlong celebration, the Kendal community focused on educating residents and staff about dementia to ensure that each person who faces such a diagnosis is able to lead a resilient life.

One of the most visible signs of that commitment was the opening in early 2018 of the Jameson House, a "small house" environment offering men and women with mild to moderate cognitive changes a supportive, warm and creative home. The house has 12 private bedrooms with European-style showers and a window overlooking an enclosed courtyard, a Great Room with a fireplace hearth and country kitchen, a spa with beauty station and whirlpool bath, a library, quiet room for art, puzzles and other activities and a multi-purpose room for exercises, movies, music and lectures.

The house also has many special designs that offer comfort, safety and curiosity for people with memory challenges. Residents can safely walk anywhere inside and out because the house is laid out along an enclosed circular path with an outdoor courtyard in the middle. The courtyard has a sensory garden, featuring a water fountain, herb garden and dining area.

"When we designed the space and the programs, we wanted it to be as flexible as possible to reflect the residents' interests," says Kim Preston, Social Services Associate.

Another effort focused on dementia awareness was a presentation by

Tracey Lind, who ended her 17-year-tenure as dean of Cleveland's Episcopal Trinity Cathedral after being diagnosed with early onset dementia.

"I am learning to love the person I did not recognize," the 63-year-old woman told an overflow crowd at Kendal in January. Tracey's diagnosis is Frontotemporal Dementia (FTD), a dementia that affects communication and language, mobility and memory. She now spends her time traveling with her

spouse, Emily, writing, preaching and giving speeches as she is able.

Tracey told the audience about the many changes in her daily life. Skills that came easy, such as operating a camera or tying sailor knots, are difficult. She loves to travel and hike, but now gets anxious and tentative in airports and on trails. A self-described foodie, she takes time to review a menu before heading to a restaurant.

An ongoing initiative at Kendal at Oberlin is a series of book clubs to promote a better understanding of and support for living with the challenges of cognitive changes.

"I think dementia particularly threatens our community, given that we have so many residents who are professors and highly educated. We hope the book clubs will help

to start a campus-wide dialogue on how to continue relationships with residents living with dementia," explains resident Elizabeth Hole, chair of the Conversations Working Group.

Two other related activities were the introduction of an eight-week memory enhancement course designed for residents noticing minor changes in memory functioning and sponsorship of Lorain County's annual Alzheimer's Association walk. Kendal raised \$3,000 (plus donated \$2,000 to be a sponsor) and had the largest team—more than 60 walkers.



The Jameson House Team includes (from left) Michele Tarsitano-Amato, Director of Creative Art Therapies; Stacy Terrell, Chief Health Services Officer; Amanda Hooley, Life Enrichment Coordinator; and Kim Preston, Social Services Associate.



Kendal at Oberlin Recognized for Food Rescue Contributions

Oberlin Community Services presented Kendal at Oberlin Hospitality Services kitchen staff with its Silver Spoon Award March 27 in recognition of their outstanding contributions to OCS's Food Rescue program.

OCS supports local families that have a hard time making ends meet and putting food on the table day after day. OCS created its Food Rescue program in 2018 working with just a few local organizations, including Kendal at Oberlin and Oberlin College, to repurpose and redirect leftover food to those who might otherwise go hungry.

Greg Zehe, Kendal at Oberlin's Director of Hospitality Services, had informed OCS that his staff had the skills and equipment needed to

flash freeze full and half pans of leftover food for distribution to local hot meals programs. Hospitality Services also advised OCS about food safety techniques needed to establish proper procedures for the hot meals program.

By involving local restaurants, the OCS program has now grown considerably, increasing the number of individuals who can be served.

- OCS received more than 19,700 pounds of food rescue donations in 2018.
- Kendal at Oberlin donated 700 pounds of frozen prepared foods last year, and in the first two months of 2019 had already donated 380 pounds.
- One dinner a week for 10 to 30 people served

by Oberlin Weekday Community Meals is now entirely provided by Kendal at Oberlin's food rescue donations.

- Kendal at Oberlin increased the frequency of its donations from twice monthly to weekly to accommodate increased demand during the federal government shutdown from Dec. 22 to Jan. 25.

"Food rescue programs are extremely important," OCS notes on its website. "This waste is a problem because lots of people are going hungry, and also because food waste in landfills produces large amounts of methane and contributes to global challenges."

Plans advance for Zen Inspired Kendal in Northern California

Kendal and the San Francisco Zen Center's plans to create the first Zen Inspired Senior Living Community in the U.S. continue to move forward by securing necessary planning, zoning and regulatory approvals from local and state authorities for the development.

Plans currently call for Enso Village to open in 2023 in northern California's Sonoma wine country. The Life Plan Community will be set on 15 acres of open space surrounded by gently sloping hills and woodlands in Healdsburg, California. The idea behind such a community is that one can move in and remain completely independent, but if one has need for higher levels of care in the future, such as assisted living or memory care, that care can be provided right within this community.

While the design aesthetic will be decidedly "Zen-inspired" and there will be a meditation hall and senior Zen teachers living within the community, all of the practice will be voluntary. It will be available to those who are regular practitioners and for those who wish to try something new, but there will be no pressure or expectation for those who choose to live life alongside, but not engage with, the spiritual aspects of Zen.

Enso Village will be part of the Kendal network of senior living communities founded on Quaker principles and values.

"Enso Village is committed to a community rooted in the fundamental values of kindness and compassion and to creating a special place to

'live lightly on the land' in a beautiful setting," says Sean Kelly, Kendal's President and CEO. It is exploring an action plan guided by Bioregional's One Planet Living framework, which includes a commitment to extremely high environmental standards.

While the specific amenities are continuing to be considered and programmed, San Francisco's Greens Restaurant, acclaimed for its vegetarian dishes, has agreed to create a top-notch dining experience in Enso Village's bistro—one of two dining areas planned for future residents. The community will not, however, be exclusively vegetarian. The main dining room will offer a menu that reflects those of other acclaimed Sonoma dining establishments.

It is anticipated that Enso Village will include 220 apartments for independent living, as well as up to 24 assisted living and 30 memory support residences. Floor plans are currently being developed and will be shared when finalized.

The City of Healdsburg refers to the acreage on which Enso Village will be built as the North Entry Area Plan. There are other uses anticipated for the overall parcel as well including multi-generational housing, a boutique hotel, restaurant and workforce housing. To learn more, visit enso.kendal.org.

Way of Tea

The Way of Tea is a practice and art that developed in the 15th and 16th centuries in close conjunction with Zen. Often served in the enclosed space of a tea garden, offering an intimate and protective setting for tea gatherings.



Ann Gillespie named Collington's CEO

She brings wide-ranging leadership experience

Collington's Board of Directors has selected Ann E. Gillespie, an aging-services professional with more than 30 years of experience, to lead the senior living community as its CEO beginning July 1, 2019. Ann succeeds Marvell Adams Jr., who became The Kendal Corporation's chief operating officer after serving from 2011 to 2019 as Executive Director/CEO of Collington, Kendal's metro Washington, D.C.-area affiliate.

"We are very excited that Ann has accepted the CEO responsibilities for Collington Life Plan Community," said Michael Nolin, Chair of Collington's Board of Directors. "Collington is a dynamic community that seeks to transform the experience of aging for its residents and the wider community. Ann's broad experience and visionary leadership will guide us in these efforts."

Ann started her career with the U.S. Senate Special Committee on Aging, where she worked on initiatives in federal senior housing and employment legislation. After four years on Capitol Hill, Ann was recruited by leaders in the continuing care field to serve as the founding executive of the Continuing Care Accreditation Commission (CCAC). Along with providers, hundreds of peer volunteers and other stakeholders, she led the transformation of the field to become self-regulated and fiscally prudent by reducing the potential for federal oversight while increasing confidence and trust on the part of consumers, lenders and regulators.

After 15 years leading CCAC, Ann was appointed Senior Vice President for Shared Learning and Leadership of The American Association of Homes and Services for the Aging (AAHSA, now LeadingAge). Notably in that role, Ann established the Association's Leadership Academy and served as trusted adviser to its CEO senior living systems network.

"My roots with both Kendal and Collington go deep," Ann said. "I worked side by side for many years with Lloyd Lewis, founder of The Kendal Corporation, in the creation and growth of the Continuing Care Accreditation Commission. John Diffey, who succeeded Lloyd as Kendal's CEO, was one of the founding members of the Leadership Academy. Collington's founders established their community using CCAC's standards of excellence and became the youngest accredited CCRC in the nation."

In 2007, Ann joined Booz Allen Hamilton to launch, grow and lead the firm's new business to serve large not-for-profit clients. She also guided government clients in work around climate change and helping consumers gain increased



access to broadband technology through a national grants program.

Ann joined Asbury Communities as its Chief Strategy Officer in 2012 where she was responsible for the development and oversight of the organization's strategy, positioning the system for the health care reform environment, as well as the expansion of new business lines that included home and community-based services.

Before accepting the Collington role, Ann served as a strategic consultant and adviser for clients in the government, private and not-for-profit sectors in the Washington, D.C. region.

"Ann's experience as the architect of the accreditation body, now known as CARF International, is a testament to her dedication to excellence in serving older adults," said Marvell Adams, Kendal's COO. "As Collington begins a new chapter in its evolution, her vast knowledge and strategic insight will guide the organization toward an even brighter future."

Ann is a graduate of Miami University of Ohio and the recipient of that University's Scripps Gerontology Center's Cottrell Distinguished Award for Scholarship, Leadership and Outstanding Contributions to the Field of Aging. She has held several board positions, including Asbury Communities (headquartered in Maryland) and Covia Communities (in California), and she currently serves on the Executive Committee of The Foundation for Autism Support and Training (in Maryland).

Kendal Joins Effort to Advance Person-Centered Dementia Care

When the Alzheimer's Association convened dementia care providers and thought leaders from across the country in Chicago in July 2018, Kendal President and CEO Sean Kelly and Stacy Terrell, Kendal at Oberlin's Chief Health Services Officer, were at the table. They are founding members of the Alzheimer's Association's new Dementia Care Provider Roundtable (AADCPR).

"The Alzheimer's Association is committed to improving care for people with Alzheimer's and other dementias across care settings and by bringing together dementia care leaders we know we can make improvements in care," said Beth Kallmyer, Vice President, Care and Support, Alzheimer's Association. "The AADCPR members are leaders from companies on the front lines providing care, and together we can develop and advance needed solutions and strategies that result in better person-centered care for people living with dementia."

A major emphasis for the AADCPR will be facilitating implementation of the Alzheimer's Association 2018 Dementia Care Practice Recommendations released in January 2018. The 56 recommendations, developed by 27 dementia care experts, emphasize person-centered care across 10 content areas and are based on a comprehensive review of current evidence, best practice and expert opinion. They are intended for professional care providers who work with individuals living with dementia and their families in long-term and community-based care settings.

In addition, the AADCPR will address cutting-edge and emerging issues facing dementia care providers, including:

- Challenges of person-centered care implementation.
- Evaluating person-centered care practices and outcomes.
- Working better with diverse families.
- Gaps in psychosocial research.

"One of our goals will be to come to a common understanding and appreciation for a definition of person-centered dementia care that is easy to say, easy to understand, has an inspirational tone and is embraced by health care providers of all stripes, including hospitals," Kelly said. "We might also want to identify the optimal caregiver profile for the delivery of person-centered dementia care."

It is estimated that nearly 60 percent of older adults with Alzheimer's or other dementias reside in the community (outside a hospital or clinical setting). About 25 percent of these individuals live alone, but the remainder receives care from family members, unpaid caregivers and community-based and residential care providers. By age 80, 75 percent of people with Alzheimer's dementia are admitted to a nursing home. The AADCPR and its members will address current and emerging issues guiding care in these settings.

"It is essential to focus on fostering a culture of respecting, valuing and seeing the individual with cognitive change as a whole person with feelings, choice and rights—not disease," Terrell said. "Those living with cognitive changes should not be ignored, spoken over or around, but treated as adults and provided with the supports to empower them to live their most resilient lives."



alzheimer's  association®

Marvell Adams Jr. Named Kendal COO



Marvell Adams Jr., who served as Executive Director/CEO of Kendal's metro Washington, D.C.-area affiliate, Collington, for seven years, was named The Kendal Corporation's Chief Operating Officer in October 2018. He succeeded Judy Braun, who retired in July 2018 as COO after 17 years with Kendal.

Adams took the helm as Collington's Executive Director two months after the community's affiliation with Kendal in June 2011. At that time, less than 70% of Collington's 360 residential/independent living cottages and apartments were occupied, and the community had millions of dollars in deferred maintenance. By the end of 2017, more than 95% of Collington's cottages and apartments were occupied.

During his tenure, Adams led the successful restructuring of Collington's debt and oversaw the investment of more than \$30 million in infrastructure—addressing 10 years of deferred maintenance. Recently, he was elected to the Board of Directors of LeadingAge, a national association of not-for-profit aging services providers.

"Marvell gave steady and inspired leadership through some incredibly challenging times at Collington, always with a mind for what was to come," said Sean Kelly, Kendal's President and CEO. "Today, Collington is strong, well along in working toward its next phase of existence, having achieved a large degree of

financial stability fueled by sustained occupancy and a culture that is invigorated and eager for what's next."

Adams came to Collington from Rochester, New York, where he was COO/Administrator at The Highlands at Pittsford, a continuing care retirement community affiliated with the University of Rochester Medical Center. He began his career in Rochester, New York, at Monroe Community Hospital, a long-term care community, where he trained and completed the requirements to become a licensed nursing home administrator.

After receiving his bachelor's degree in political science from the College of Charleston in South Carolina, Adams earned a master's degree in health care administration from the School of Public Health at the University of North Carolina at Chapel Hill. He contributes to the academic community and helps cultivate the next generation of aging services professionals by serving as a regular guest speaker at Cornell University, UNC at Chapel Hill and Penn State.

Since 2016, Adams has served as Kendal's Director for Emerging Talent, helping Kendal affiliates to identify, develop and maintain high-quality internship/fellowship opportunities that are academically relevant for students. Over the past decade, he also has been a surveyor for CARF, an accrediting body for health service providers and retirement communities worldwide.

System Finances

THE KENDAL CORPORATION devoted 2018 to supporting Kendal Affiliates through leadership transitions, building a framework for systemwide strategic planning and helping affiliates execute on expansion and repositioning projects. With our partners, we continued to make progress on developing a unique, Zen-inspired senior living community in Northern California. In accordance with its longer-range plan, Kendal continued to focus on its pension plan, reducing its unfunded pension obligation by nearly 21% (\$3.9 million). In 2018, Kendal's plan provided reliable income to more than 400 active Kendal retirees, funding nearly \$3 million in retirement income benefits. There are over 1,000 future retirees in the plan who will benefit from Kendal's ongoing commitment to honoring the promises made to those who have served at Kendal, while at the same time, remaining responsive to the evolving demands of today's labor markets. The Kendal Corporation Group Health Plan concluded its fifth year of service in 2018, providing essential coverage to participating Kendal Affiliates' employees and families. Conceived at a time when there was a great deal of uncertainty about the availability and cost of health insurance, the Plan has sought to reduce cash flow volatility, remove uncertainty from the annual renewal process and enhance the health and wellness benefits participating affiliates provide to their employees. The Plan complements the robust employee benefit programs many Kendal Affiliates offer, including participation incentives for wellness initiatives aimed at managing chronic conditions, identifying emergent health risks and improving quality of life for participants. The Plan provided coverage for over 1,350 members during the year, with continued improvement in the loss ratio over the prior year, increasing plan reserves by just over \$2,100,000. Although permitted by the Plan documents, the Plan has not had an additional capital call or adjusted the stable premiums paid by participants during a plan year since inception; however in 2018, we distributed

excess reserves of just over \$2 million back to member affiliates.

—Amy Harrison, CFO

THE ADMIRAL AT THE LAKE refinanced \$150.94 million in tax-exempt bonds in December 2017, and the annual financial performance for The Admiral in 2018 was the best it has been since opening in July 2012. The Admiral saved over \$3 million in debt service compared to 2017 and will continue to see substantial savings in debt service over the life of the new bonds. During 2018, The Admiral continued its operational excellence and achieved a net operating margin of 17%, putting the community in the 80th percentile of all CARF-accredited communities. In addition, The Admiral met all the required debt covenants. The refinancing at the end of 2017 has allowed The Admiral to reimagine what's possible for the community by allowing the community to leverage its resources. In fact, The Admiral completed its first strategic plan since opening in 2012, with input in various ways from over 140 people. The four strategic themes of the plan are caring for the whole person, attracting and growing talent, nurturing the culture and fostering engagement, and leveraging resources and relationships. In developing the strategic plan and now in carrying out the plan over the next three to five years, the community was able to and will continue to imagine the possibilities. Among the many accomplishments in 2018, The Admiral was able to launch an employee educational assistance program and provide \$5,650 in assistance to five employees. Participation in this program is expected to grow in 2019. In addition, The Admiral in conjunction with The Admiral at the Lake Foundation was able to provide over \$420,000 in financial assistance to residents in need during 2018.

—Daniel Churchill, CFO

For **BARCLAY FRIENDS**, 2018 was a year of renewal. After a devastating fire destroyed Woolman, the personal care building, in November 2017, the entire Barclay Friends campus was closed while Woolman was demolished, and utilities were rebuilt and restored to Cotter, the skilled nursing building. On April 2, 2018, we reopened our doors and began

welcoming back residents to Cotter. Within the first two weeks of reopening, Barclay Friends welcomed back 50 residents. In the 9 months Cotter was open in 2018, there were admissions of 242 residents! Since the fire, Barclay Friends has been working with architects, engineers, contractors and the team at Kendal Corporation to put together plans for a new personal care building. The building, called Preston, will serve older adults looking for residential, personal care, and/or memory support services. Barclay Friends was very fortunate to have strong insurance coverage. Our property policy covered not only the loss of property but also the loss of income enabling Barclay Friends to continue to provide services to its residents who moved back to Cotter while working to rebuild the rest of the community. Barclay Friends had an increase in net assets of \$8.5 million in 2018. Our balance sheet remains strong with \$35.5 million in assets and only \$8.3 million in liabilities. Cash flows for the year were positive by \$1.7 million and we had 596 days cash on hand at yearend.

—Jennie Bury, Director of Finance

CHANDLER HALL had a challenging year in 2018. The personal care census declined significantly due to changes in market conditions and growth in competition. An improved payer mix in the skilled nursing area and an increase in residential living occupancy were not enough to offset an overall 7% decline in census. In addition, Chandler Hall incurred a full year's interest expense on debt refinanced in July 2017, causing interest to grow by almost \$500,000 over the previous year. In response to these challenges, Chandler Hall began a strategic assessment of operations in 2018 that continues in 2019. Dakia McMillian came on board as Executive Director in March 2018 and immediately began to implement a turnaround plan to increase census and make appropriate reductions to operating expenses. Several initiatives were undertaken in 2018 that continue into 2019.

- In November, the Hicks Memory Support Residence became a secured and certified Dementia Care Unit. Census grew from 24 in November to 33 in February 2019. We expect the

growth in census in 2019 to result in an overall \$600,000 increase in revenue.

- Because of declining personal care occupancy in the three 24-bed Manor Houses, we closed the Cain building in late 2018. Residents in Cain transferred to open rooms in the Jordans and Phelps buildings. We made this decision after determining that the loss of revenue in Cain would be offset by cost reductions. Management is currently evaluating various options to renovate and repurpose the Cain building.
- Hospice at Home services are expected to grow significantly in 2019. We recently added a marketing liaison to work with existing referral sources to increase the home care census and to help Hospice at Home expand its geographic reach.
- Expense reductions that will be realized in 2019 include:
 - Savings of \$110,000 from the closing of two kitchens and a decrease of three FTEs.
 - Savings of \$5,000 per month beginning in May 2019 from changing the pharmacy supplier for Friends Nursing Home.
 - Over \$100,000 in annual savings beginning in April 2019 because Chandler Hall obtained its own individual workers compensation policy.

The combination of the initiatives noted above, and other revenue enhancements and expense reductions will enable Chandler Hall to increase operating net income by over \$1,000,000 in 2019.

—Michael McGlone, Senior Director of Finance

COLLINGTON continued its recent success in 2018 with 304, or 93.5%, of its Independent Living residences occupied. Collington continues to improve upon its financial stability, ending the year with a Debt Service Coverage Ratio of 1.75x, a net operating margin of 13.5%, and 202 days cash on hand. Collington was able to achieve success in 2018 through a keen focus on operational excellence. Collington continued implementation and execution on the community's 2018–2023 Strategic Plan,

solidifying the deliberate strategic focus for the community over the next five years. The partnership among residents, Board members and the Leadership team, in the strategic planning process, is paying dividends. The key initiatives Collington plans to emphasize are Health and Wellness, Stakeholder Engagement, Stewardship of Resources and Partnerships. The Collington Foundation funded 35 employee scholarships, totaling \$38,850, and provided over \$116,000 to support residents with financial hardship. In 2018, the Collington Foundation received \$485,093 in donations.

—Justin Reaves, CFO

KENDAL-CROSSLANDS COMMUNITIES had another year of strong positive results, with an excess of revenues over expenses of approximately \$3.95 million, driven by net income from operations of \$2.7 million and realized gains of approximately \$1.26 million for 2018. Net assets decreased slightly to approximately \$69 million in the same period. KCC has maintained a strong cash and investment position relative to debt obligations, with \$90 million in unrestricted cash and investments, compared to just under \$49.3 million in long-term obligations, and more than 620 days cash on hand at year's end. Kendal-Crosslands Communities enjoyed overall occupancy of approximately 90%, across a diverse array of living options in 2018.

—Edward Plasha, Director of Finance

KENDAL AT GRANVILLE continued to focus on increasing occupancy during 2018. The community engaged an independent firm to provide strategic advisory services. The primary purpose of the engagement was to assess Kendal at Granville's position in the market, provide strategic recommendations and create a financial projection analyzing the impact of its recommendations. Kendal at Granville began implementing the recommendations during the fourth quarter of 2018 and continued to develop short-term strategic initiatives moving into 2019. We are optimistic that these strategies will increase revenue through increased occupancy over the next several years. During 2018, net assets decreased by \$1.3 million.

The Community wrote off the amortized deferred costs of acquiring initial continuing care contracts totaling \$671,145 as a result of adopting Financial Accounting Standards Board (FASB) Accounting Standards Codification (ASC) 606, Revenue from Contracts with Customers. In addition, the Community wrote down the operating rights to licensed beds (skilled nursing) by \$304,000 as a result of entering into a contract to sell operating rights to 12 licensed beds. Both transactions were recorded as nonoperating losses.

—Jennifer Bobak, Finance Manager

KENDAL AT HANOVER announced that Fitch Rating reaffirmed that the community has maintained a BBB+ investment grade rating with a "stable" outlook for fiscal year ending December 31, 2018. The community realized income from operations of approximately \$2,754,400, had nonoperating gains of approximately \$139,300 and unrealized losses on investments of approximately \$2,344,100. The average residential occupancy for Kendal at Hanover for the year was 97.8%, while the average occupancy for Assisted Living – Level 1 was 80%, Assisted Living – Level 2 was 86.9% and Whittier assisted living (the memory support area) was 96.7%. During the fiscal year, Kendal at Hanover invested approximately \$6,203,800 in capital improvements. The larger capital dollar projects expended were for apartment turnovers/renovations (\$1,997,600) and (\$3,162,700) for the initial year of a three-year Health Center Expansion/Renovation Project. The three-year construction of the Health Center Project, at a cost of approximately \$31 million including capitalized interest, was funded with the financing of our Series 2018 Bond Issue that closed in June 2018.

—Brent Edgerton, Associate Executive Director/CFO

KENDAL AT HOME dedicated 2018 to independence, alignment and operational strength. We worked closely with The Kendal Corporation to review and internalize our human resources and benefits-related activities. This was the final step in our journey to becoming an independent Kendal affiliate. Eliminating costs from a Shared Service Contract and establishing a comprehensive benefits package specific to our

needs reduced expenses and strengthened our operations. To better align our resources with our core mission, we dissolved our Supportive Services Home Healthcare Division. We transitioned our open cases and staff to our largest provider, allowing for a seamless delivery of services to our members and clients. We continue to work closely with this provider and all others to deliver exceptional care with a Kendal touch to our members. Thirty new Kendal at Home members joined our existing 300-member family in their quest to live their best life on their own terms. Our Care Coordinators managed over 84,000 hours of care, along with wellness initiatives, to keep members thriving in their homes. Our small but mighty staff worked intentionally throughout the year on building our team to best support each other and our growing program. These staff-wide efforts led to a 40% improvement in our operating deficit from the previous year. Kendal at Home is strong and poised for growth. —Karen Graham, Controller

KENDAL AT ITHACA enjoyed a very successful FY 2018, highlighted by census growth in both Independent Living and the Health Center. Independent Living occupancy reached 88% by yearend, with the highest level in 10 years. Health Center census was very strong throughout the year, with the expanded Skilled Nursing area averaging 97% occupancy. The higher census helped total revenue grow by \$1.6 million, or 7%, over the previous year. With its continued focus on operational excellence, Kendal at Ithaca saw improvement in several key financial indicators. Days cash on hand rose to 683 days and the Net Operating Margin ratio remained positive. Impressive results on key actuarial measures helped Kendal at Ithaca to again earn A.V. Powell's Exemplary Recognition Seal. During 2018 S&P Global Ratings affirmed Kendal at Ithaca's investment grade credit rating of "BBB" with a stable outlook. —Gregory Sommers, CFO

KENDAL AT LEXINGTON's Phase III renovation and expansion project was in full swing during 2018, despite the three-month delay starting construction and record setting rainfalls throughout the year. All 30 Sunrise Ridge cottages have been

reserved, with occupancy to begin in September 2019. Total revenue for 2018 declined by \$2.8 million from the previous year with the intentional reduction in occupancy in both the assisted living and skilled nursing centers and the adoption of new accounting regulations. Unrealized equity investment gains and losses are now included in total revenue and the community recorded a loss of \$986,000; however, investment income increased by \$250,000. Residential living occupancy continued to be strong with an average occupancy of 97.2% for the year and revenue from fees exceeding 2017 by \$156,000. Despite the construction and budgeted loss, prudent fiscal management and restraint enabled the community to post an operating gain of \$386,000 with a net operating margin of 5.4%. Total net assets increased by \$1.8 million and the Cash to Debt Ratio improved from 45.1% to 49.9%. With an increase in investments of \$585,000 and \$2.5 million in entry fee receipts, days cash on hand at yearend was 606, and the long-term debt service coverage ratio was 1.94. Fitch affirmed Kendal at Lexington's BBB- investment grade rating with a stable outlook. Kendal at Lexington was extremely proud to be re-accredited as a Life Plan Community and to receive two new accreditations: as a Person-Centered Long-Term Care Community and Dementia Care Specialty Program. These programs will be further enhanced by our health center renovations in which spacious households will provide a homelike environment for our frailest residents.

As the completion of the repositioning project approached, the community redirected its attention towards the more distant future. To that end, the Board of Directors began a new strategic planning initiative. During 2019, six task groups, comprised of Board members, residents, staff and community members, have been assembled to investigate and recommend future goals and initiatives. The task groups will focus on: resident trends, expectations and aspirations; information technology and innovation; work culture; access to medical services; community engagement; and resource allocation. —Felicia Bush, Chief Financial Officer

It was a year full of many accomplishments as **KENDAL AT OBERLIN** celebrated its 25th Anniversary since opening in 1993. 2018 began with the opening of The Jameson House, a small house that offers memory support services for residents living with mild to moderate cognitive changes. Kendal at Oberlin ended the year raising over \$2.9 million as part of the 25th Anniversary Initiative focused on growing the Residents Assistance Fund so future needs are met. Kendal at Oberlin's 2018 financial results were recently reviewed by Standard & Poor's, which resulted in a bond rating upgrade from an A- to A with a stable outlook!

Key areas of focus and accomplishment in 2018 included:

- Operational Excellence – Kendal at Oberlin completed an operational review, which identified areas of focus and process improvement needed to maintain strong financial results and operational excellence.
- The successful sale of 30 of the 42 Medicare Licenses resulted in a gain from the sale but also long-term cost savings related to the State of Ohio Franchise Tax tied to each of the Licenses. This also allowed Kendal at Oberlin's Stephens Care Center to relicense 30 of the rooms to come under Residential Care Facility Licensure (Assisted Living Level of Care).
- Based on a dedicated process with the Board, residents and staff, Kendal at Oberlin successfully launched a new pricing model that will support future strategic initiatives of the Board and the community.
- Kendal at Oberlin received LeadingAge Ohio's Silver Employer of Choice Award. The award recognizes those organizations that demonstrate high-quality operations and a focus on employee engagement.

As we look to the next 25 years we know that Kendal at Oberlin will continue to enhance the resident experience through ongoing planning, listening to resident feedback and developing programs and services that are creative and resident-centered. —Ann O'Malley, CFO

KENDAL ON HUDSON emerged from a year of transition, with changes in its CEO and other senior leadership, demonstrating strong trends in occupancy and operational performance that are carrying into 2019. Changes in the marketing department and implementation of a comprehensive digital marketing program have resulted in increased leads, increased move-ins and improved occupancy for all levels of care. Additionally, a focus on filling vacant positions has realized savings and decreased the utilization of agency nursing. Improvements in budgeting and financial reporting are enabling managers to effectively control costs. Fitch recently affirmed the rating of Kendal on Hudson's outstanding debt as BBB with a stable outlook based on the results of the strategies implemented and the positive trends demonstrated in the last half of 2018 and early 2019.

A master planning process has begun which will engage all of Kendal's constituents and ultimately enable Kendal on Hudson to deliver market-driven programs steeped in Kendal's values. Kendal on Hudson's transition is planful and designed for continued evolution in these dynamic times.

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



Kendal Board Chair inducted into Historic Germantown Hall of Fame

Joan Countryman, who has served as Chair of Kendal's Board of Directors since 2014, has been honored for her illustrious career as a groundbreaking educator. At a gala celebration in June, Joan received the Historic Germantown Hall of Fame Award. Historic Germantown is a partnership of 18 historic houses, destinations and museums in Philadelphia that have joined together to protect, preserve and share some of Philadelphia's prized historical assets.

In 1958, Joan was the first African American student to graduate from Germantown Friends School in Philadelphia. In keeping with its Quaker heritage, Germantown Friends had opened enrollment to African American children in 1948, and she transferred into third grade there.

Joan says she "learned the beauty of mathematics" at Germantown Friends. She went on to get a bachelor's degree in mathematics and writing from Sarah Lawrence College and a master's degree in urban planning at Yale University. Then, as a Fulbright Scholar, she

studied social administration at the London School of Economics. In 1970, she returned to Germantown Friends, where she taught math for 23 years and became head of the department and Assistant Head of School for Academic Planning and Director of Studies.

Joan retired in 2005 as Head of Lincoln School in Providence, Rhode Island, a Quaker school for girls. In 2006-07, as Founding Head, she helped open the Oprah Winfrey Leadership Academy for Girls in South Africa. She has lectured at the University of Pennsylvania and served as a consultant to the School District of Philadelphia. She is an honorary trustee of Sarah Lawrence College and has also served on the board of managers of Haverford College and as President of the Haverford College Corporation. Joan now chairs the board of Friends Center City, a retirement community "without walls" in Philadelphia.

As a teacher, Joan says she considers her service on The Kendal Corporation Board "a high point in my journey through lifelong learning."

Lisa Holloway named Kendal's Health Services VP



Lisa Holloway joined The Kendal Corporation's staff in July as Vice President, Health Services. In that position, Lisa will work in collaboration with health services administrators, directors of nursing and compliance liaisons at each Kendal community to ensure that high-quality health services are provided in a manner consistent with Kendal's Values and Practices.

"Lisa provided our search committee with an insightful and energetic perspective on health services," Kendal COO Marvell Adams said. "Her interest in innovation and model practices outside of our industry was refreshing to hear. Lisa will be a phenomenal resource for the Kendal system."

Lisa comes to the Kendal family with more than 20 years of experience as a health care administrator with both not-for-profit Life Plan Communities and proprietary nursing homes. In 2004, she joined Covenant Retirement Community of Cromwell, a not-for-profit CCRC in suburban Hartford, Connecticut, as Administrator of Health Care Operations. Over the course of 10 years at Covenant, Lisa worked to revise staffing and quality-control processes, eliminated the use of agency nursing staff and ensured a consistent focus on high-quality delivery of care.

Most recently, Lisa has served as Vice President/Administrator, Health Services, at Duncaster, a not-for-profit CCRC in Bloomfield, Connecticut. Situated on an 87-acre campus, the community includes 200 independent living apartments, 48 assisted living apartments (including 24 memory care residences) and a 60-bed short- and long-term skilled nursing area. Duncaster's skilled nursing area has been recognized as one of the Top Nursing Homes in America by *U.S. News and World Report*. Lisa also has served as Duncaster's corporate compliance officer.

"I am incredibly excited about this opportunity to work with my colleagues at Kendal to further their commitment to ensuring that those who live in Kendal communities can focus on wellness and prevention while living a purposeful life," Lisa said. "The health care environment continues to evolve, and it is imperative that we think creatively and strategically about collaborating with innovative, forward-thinking organizations and individuals to provide high-quality services to all residents and patients in Kendal communities."

Lisa has a master's degree in social work from the University of Connecticut, as well as master's degrees in management and business administration from Albertus Magnus College in New Haven, Connecticut.

The Kendal Corporation Condensed Financial Information

beginning 1/1/18 and ending 12/31/18

BALANCE SHEET

| | |
|---|---------------------|
| Assets | |
| Cash and Investments | \$2,133,565 |
| Receivable from Affiliates and Intercompany | 4,451,657 |
| Other Assets | <u>20,412,254</u> |
| Total Assets | <u>\$26,997,476</u> |
| Total Liabilities | 26,935,081 |
| Without Donor Restrictions | (1,373,970) |
| With Donor Restrictions | <u>1,436,365</u> |
| Total Net Assets | 62,395 |
| Total Liabilities and Net Assets | <u>\$26,997,476</u> |

Statement of Operations

| | |
|--|------------------|
| Operating Revenue | |
| System Fees from Affiliates | 7,914,843 |
| Development Fees | 621,990 |
| Outreach Programs | 322,317 |
| Investment and Other Income | <u>485,063</u> |
| Total Operating Revenue | 9,344,213 |
| Expenses | 10,068,347 |
| Operating Gain (Loss) | (724,134) |
| Non-Operating Revenue | |
| Reserve Fee from Affiliates | 233,304 |
| Realized Gains (Losses) on Investments | 106,010 |
| Change in Defined Benefit Pension Plan | 3,948,475 |
| Unrealized Gains (Losses) on Investments | <u>(910,629)</u> |

Incr (Decr) in Net Assets

| | |
|----------------------------|--------------------|
| without Donor Restrictions | <u>\$2,653,026</u> |
|----------------------------|--------------------|

Social Impact

Kendal recognizes the importance of Social Accountability, being a responsible member of the larger community, and making a difference in people's lives beyond Kendal's walls. Kendal also recognizes the importance of providing a meaningful workplace through opportunities for employees to engage in something larger than oneself to have a meaningful, positive impact in the organization and the world.

Social Impact involves providing positive value to society as a result of an activity, program, project, or policy that is felt by people either directly associated with that organization or individual or have a more far-reaching effect on people in different communities, states or countries.

Kendal and members of the Kendal family donate hours, ideas, dollars and effort to improve the health of their community. A Social Impact focus benefits the individual (resident, staff, community member), the organization (Kendal and its affiliates), the greater community and the wider world. It provides individuals with a sense of purpose, commitment, and organizational citizenship, as well as positive emotions, resilience, psychological well-being and energy. Residents have a sense of purpose and a connection, a way to contribute and continue using their skills and talents allowing them to age more gracefully. Employees can be proud to work for their organization and to committing to someone in or something about their organization.

For everyone, it's about doing something worth doing, feeling good about oneself and helping to improve the lives of others in the process.



Staff across the system participate in public awareness events such as the Walk to End Alzheimer's.

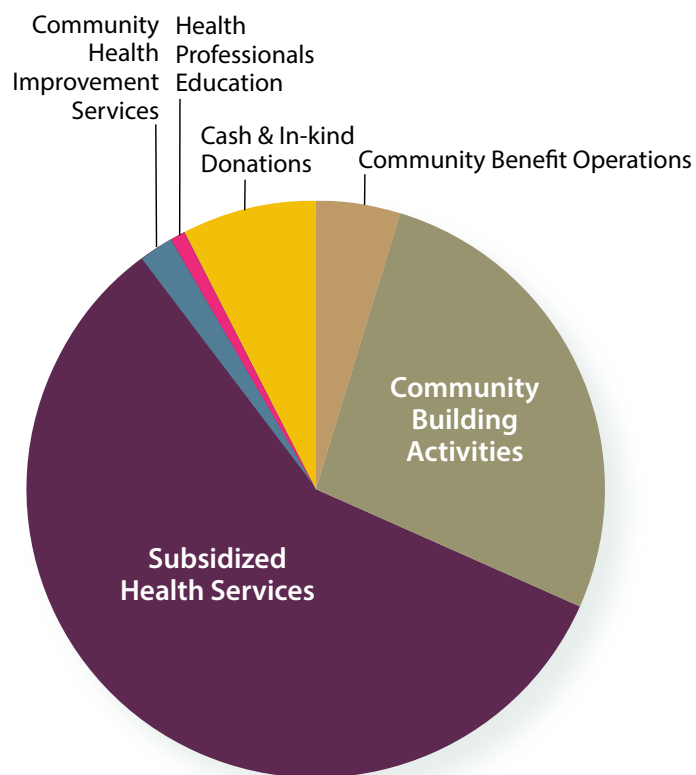
Kendal at Oberlin residents, staff and board members contributed more than 47,780 hours of volunteer service in 2018 at more than 80 nonprofit agencies, valued at \$1,114,707, according to research by Independent Sector.



Kendal System 2018 Community Benefit Statistics

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

| COMMUNITY BENEFIT CATEGORIES NET BENEFIT | Persons Served | Benefit |
|--|----------------|--------------------|
| Community Health Improvement Services | 2,641 | \$69,515 |
| Health Professions Education | 0 | \$1,532 |
| Subsidized Health Services | 2,726 | \$3,170,323 |
| Cash and In-Kind Donations | 20,033 | \$394,849 |
| Community Building Activities | 6,169 | \$892,397 |
| Community Benefit Operations | 0 | \$109,635 |
| TOTAL | 31,569 | \$4,638,251 |



What is a Community Benefit?

According to LeadingAge, "Community benefit activities are community outreach services that demonstrate an organization's charitable mission." Community benefit programs or activities respond to identified community needs and meet at least one of these objectives:

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

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

Taking Responsibility in the Larger Community

"Just as we encourage our community members, boards and staff to be involved in the larger community as individuals, we believe that each Kendal Affiliate must be a responsible member of the larger community. To this end we strive to be good neighbors, use responsible business practices, be good stewards of the environment, maintain ethical relationships and build good relations within the local community....Whenever possible, we share our resources, knowledge and facilities with the larger community. Staff members are encouraged to share their skills with local groups through speaking engagements, workshops and other educational programs."

—Kendal Values and Practices, page 18

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

Kendal Giving

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

| AFFILIATES' FUNDS | | FY 2018 |
|---|--|---------------------------|
| Resident Assistance | | \$28,896,218 |
| Employee Assistance | | \$4,049,755 |
| To Benefit Kendal Community | | \$20,879,754 |
| To Benefit Wider Community | | \$330,635 |
| Expectancies from CGA's, Unitrusts & Bequests | | <u>\$11,855,127</u> |
| Total | | \$66,011,489 |
| KENDAL CHARITABLE FUNDS | | |
| For Kendal Charitable Funds Benefit | | \$2,922,629 |
| Expectancies for Affiliate Benefit | | \$1,064,394 |
| Total | | <u>\$3,987,023</u> |
| GRAND TOTAL | | \$69,998,509 |

| | |
|----------------------------------|--------------|
| Board Members | 162 |
| Residents/Members | 2,048 |
| Corporations/Organizations | 287 |
| Family Members and Friends | 1,232 |
| Employees | 372 |
| Foundations and Trusts | 51 |
| Friends of Kendal | 343 |
| Resident Associations/Committees | 47 |
| Estate Gifts | <u>28</u> |
| Total | 4,570 |

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

Kendal Charitable Funds hosts 'Impacting Lives' reception at LeadingAge conference

During the 2018 LeadingAge Annual Meeting at the Philadelphia Convention Center, Kendal Charitable Funds hosted a reception at The Pennsylvania Academy of the Fine Arts (PAFA). Kendal staff, board members and residents attending the LeadingAge conference were invited.

The event highlighted information about Kendal initiatives from around the country that positively impact the lives of older people. As the philanthropic arm of Kendal, KCF provides grant funding for initiatives to improve the circumstances of older people, both within the Kendal System and beyond.

KCF's Lloyd Lewis Promising Innovations Grant supports the work of nonprofit organizations working in the field of aging nationwide. Since its inception, this grant program has directly or indirectly impacted the lives of more than 15,000 older adults across the country. Below are just a few examples out of the many tangible outcomes KCF's Promising Innovations grants have helped through funding.

- Developed cultural competencies training and services for older LGBTQ adults.
- Helped to increase the reach of a program to make Native American elders' homes in Arizona safer and healthier, so that residents can continue to age in place.
- KCF also provides grants to Kendal affiliates to engage, partner with and support their efforts in the wider community around aging issues.





Kendal Leadership

THE KENDAL CORPORATION

Sean Kelly, *President and Chief Executive Officer*
 Nora Adelmann, *Senior Vice President, Governance*
 Crystal Baker, *Controller*
 Stephen Bailey, *Senior Vice President, New Business & Development*
 Howard Braxton, *Director of Sales & Marketing*
 Ben Butler, *Vice President, Culinary Services*
 Marvell Adams, *Chief Operating Officer*
 Larry Elveru, *Director of Communications & Public Relations*
 Beverly Grove, *Senior Vice President, Philanthropy*
 Amy Harrison, *Chief Financial Officer*
 David Jones, *Vice President, Development*
 Eva Kaeten, *Director of Executive Services, Office of the President*
 Ted Kirkpatrick, *Director of Analytics & Performance Improvement*
 Colleen Ryan Mallon, *Chief Marketing Officer*
 Gerald (Pete) McBrien, *Vice President, Physical Environments*
 Marsha A. Perry, *Director for Benefits & Compensation*
 Kurt Rahner, *Vice President, Information Technology*
 Wanda Whitted-Smith, *Senior Vice President, Human Resources*

KENDAL NEW YORK

Sean Kelly, *Chief Executive Officer*
KENDAL CHARITABLE FUNDS Sean Kelly, *Chief Executive Officer* Beverly Grove, *Executive Director*

EXECUTIVE DIRECTOR/CEO OF KENDAL ORGANIZATION

Nadia Geigler, *The Admiral at the Lake* Linda Sterthous, *Barclay Friends* Dakia McMillian, *Chandler Hall* Ann E. Gillespie, *Collington* Douglas Helman, *Kendal at Granville* Beth Vettori, *Kendal at Hanover* Lynne Giacobbe, *Kendal at Home* Daniel Governanti, *Kendal at Ithaca* Mina Tepper, *Kendal at Lexington* Kevin Jones, *Interim, Kendal-Crosslands Communities* Barbara Thomas, *Kendal Northern Ohio/ Kendal at Oberlin* Steve Fishler, *Interim, Kendal on Hudson* Thomas Wright, *Lathrop Communities*

RESIDENTS ASSOCIATION PRESIDENT

Toni Smith, *The Admiral at the Lake*
 June Lunney, *Cartmel*
 Lois Brown, *Collington*
 Tom and Barbara Brown, *Coniston*
 Thomas Swain, *Crosslands*
 John Marshall, *Kendal at Granville*
 Bev Houghton, *Kendal at Hanover*
 Tom Rishel, *Kendal at Ithaca*
 Joe Skovira, *Kendal at Lexington*
 Margie Herbert, *Kendal at Longwood*
 Ann Francis, *Kendal at Oberlin*
 Jeff O'Donnell, *Kendal on Hudson*
 Ellen Ober, *Lathrop Easthampton*
 Christine and Jack Hjelt, *Lathrop Northampton*

Kendal Boards

THE ADMIRAL AT THE LAKE

Joan Bransfield
Charles F. Clarke III
Andrea O. Hasten
Sean Kelly
Jordan Shields
Carol Stitzer
Michael E. Traynor

THE ADMIRAL AT THE LAKE FOUNDATION

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

BARCLAY FRIENDS

Ellen Barron
Brad Barry
John Braceland
John Cigler
Duane Davis
Elizabeth Guman
Angela Lavery
Ron Madden
John Spangler
Winnie Stroup
Betsy Swan
L. Diane Toaltoan
Nelson Wicas

CHANDLER HALL

Don Bruckman
Betsy Bayardi
Jenna Davis
Phil DeBaun
Linda Flower
Karen Fulton
Sherrin Johnson
Odie LeFever
Dudley Saurman
Paul Sheehan
David Smith
Greg Wozniak

COLLINGTON

Alphonse Brown
Ken Burton
William Carrington
Sara Case
Randi Chapman
Peter Fielding
Victoria Hathaway
D. Michael Lyles
Cindy Medlock
Mike Nolin
Norman Prince
Peter Rheinstein
Mike Twigg
Jeffrey Williams

KENDAL AT GRANVILLE

Karen Chakoian
Jim Cooper
Tom Cummiskey
David A. English
Reed Fraley
Thomas Gallant
Frank Giovannelli
Talya R. Greathouse
Molly Ingold
Richard Johnston
Robert E. O'Neill
Mary Paumier
Mike Rapp
Jessica Rettig
Becky Skeen
Frank White

KENDAL AT HANOVER

Dulany O. Bennett
Frances Brokaw
Nan K. Carroll
Robert B. Donin
Robert L. Drysdale
John L. Harrison Jr.
John A. Hochreiter
Lawrence A. Kelly
John W. Kirk
Nancy P. Marion
Sherri C. Oberg
Judson T. Pierson
Ellis L. Rolett
Margaret Rightmire
Spencer Simonds

KENDAL AT HOME

Timothy Beidleman
Jennifer Campbell
Michael Carlin
Edna Chun
Andrew Fauver
Joseph Haubrich
Frank Martinez
Patricia Mezinskis
Allen Mix

KENDAL AT ITHACA

David L. Call
Harold D. Craft Jr.
Susan Dale-Hall
Mary Pat Dolan
Betsy East
Mary Ann Erickson
George P. Ferrari Jr.
Arnon Greif
John C. Gutenberger
Cindy Jefferson
Jeffrey Layton
Richard W. McDaniel
Susan H. Murphy
Alan Pedersen
Debra Raupers
Andrew Simkin
Bryan H. Warren
Charles F. Wilcox
Alene Wyatt
Paula E. F. Younger

KENDAL AT LEXINGTON

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

KENDAL AT OBERLIN

Richard Baznik
Julia Binder
Liz Burgess
Wuu-Shung Chuang
Ruth Ann Clark
Dave Clash
Vance Debouter
Mary Haber
Alexia Hudson-Ward
Dominique Hughes
Eddie Miller
Robert Monchein
Scott Moore
Alison Ricker
Diana Roose
Jack Southworth
Dan Storer
Grace Tompos
Carmen Verhosek
Joan Villarreal

KENDAL AT SONOMA

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

KENDAL CHARITABLE FUNDS

Alphonse J. Brown Jr.
Jennifer Campbell
Barbara Freedman
Julia Houpt
James Ingram
Tara Quinn
Marilyn Richards
Richard Schramm
Grace Tompos

KENDAL-CROSSLANDS COMMUNITIES

Jean M. Caulfield
Kay M. Edstene
Sally R. Harrison
Willard F. Hurd
Michael Malone
Freeman Miller
Thomas D. Paxson
Susan M. Renz
Jeffrey C. Wise
Richard E. Wortmann

KENDAL FOUNDING DIRECTORS

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

KENDAL NORTHERN OHIO

Carol Bojanowski
Liz Burgess
Anne Helm
Bob Monchein

KENDAL ON HUDSON

Bard Buanes
Marlene Calman
Ed Doty
Elizabeth Enloe
Aubrey Hawes
Bernard J. Lillis
Kyle C. McGovern
Joanne Murray
Bert Pepper
Caroline Persell
Howard Smith
John Sorice
Lynn Tepper
Lynn M. Wagner
Barry Whitcomb

LATHROP COMMUNITIES

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

OLD PEOPLE'S HOME OF THE CITY OF CHICAGO

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

THE KENDAL CORPORATION, KENDAL AGING, KENDAL NEW YORK

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

Kendal Addresses

THE ADMIRAL AT THE LAKE

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

BARCLAY FRIENDS

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

CHANDLER HALL

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

COLLINGTON

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

KENDAL AT GRANVILLE

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

KENDAL AT HANOVER

67 Cummings Road
Hanover, NH 03755-1263
603-643-8900
Email: admissions@kah.kendal.org

KENDAL AT HOME

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

KENDAL AT ITHACA

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

KENDAL AT LEXINGTON

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

KENDAL AT OBERLIN

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

KENDAL-CROSSLANDS COMMUNITIES

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

KENDAL ON HUDSON

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

LATHROP COMMUNITIES

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

THE KENDAL CORPORATION KENDAL CHARITABLE FUNDS

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



THE KENDAL CORPORATION

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



Kendal Affiliates are members of LeadingAge and of the respective affiliated state associations:

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



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



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



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

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



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

KENDAL®

Together, transforming the experience of aging.®

WORTH CENTER

1107 E. BALTIMORE PIKE

KENNETT SQUARE, PA 19348-2366

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

