



# PROFILES *in* Generosity

FALL/WINTER 2013-14

KENDAL CHARITABLE FUNDS NEWSLETTER

## IT ALL STARTED WITH A GIFT



*The Kendal at Longwood property, including this farm house, was acquired in 1971.*

In the very early 1970s, a group of Quakers in the Brandywine and Delaware Valleys of southeastern Pennsylvania worried about the lack of good options for living in retirement years. They were a group of volunteers at first, drawn together around a shared concern. There was no formal organization, no money, no land, and certainly no buildings — just a group of people committed to finding a better way.

One wonders whether that conversation would have led very far if the Philadelphia Yearly Meeting of the Religious Society of Friends had not been willing to give a \$300,000 grant in support of the exploration of developing a continuing care retirement community in Chester County. Would Kendal at Longwood exist today? Or Crosslands, Coniston, and Cartmel? And Kendal at Hanover, as

well as a succession of Kendal communities that were built during the 1990s and the past two decades? That initial grant has been multiplied over a thousand times since it was given in 1970. With it, so much has been made possible. Without it, or a comparable gift from another source, it is not clear that any of the present Kendal communities would exist at all.

There have been other important watershed moments of faith and generosity throughout Kendal's history: the Anne Perry Bequest for student internships,

the Emily Wilson Bequest to support the Untie the Elderly campaign, the many gifts over the years — large and small — that have built the capacities of Kendal communities to serve residents who outlive their financial resources, Whitey Mullestein's gift in memory of his wife, Louise, to provide for partial endowment of Kendal-Crosslands' child day care program. Fred and Isabel Bartenstein's gift of the land, which is the site on which Kendal at Lexington is built, and the recent and potentially transformational Kathryn S. Binkley Barrow gift of \$1.7 million for the benefit of Kendal at Longwood.

As the founding of what has evolved into The Kendal Corporation and its affiliated organizations

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## KENDAL LEADERSHIP—A TIMELINE

### 1960s

**The Seed.** Kendal began in the late 1960s with a gift and a charge. The gift was a \$300,000 grant provided by the Philadelphia Yearly Meeting of Friends to a group of retirees living in Southeast Pennsylvania. The charge was to “find a better way in retirement.” The result was the founding of Kendal at Longwood, a Continuing Care Retirement Community.



**1971—Kendal at Longwood property acquired.** Farmhouse on the Kendal at Longwood property—sketch by Andrew Wyeth.



**1973—First residents move into Kendal at Longwood.** Founding board member Sally Worth (left) welcomed many new residents to Kendal over the years.

**1977—Crosslands opens.** Crosslands is incorporated and breaks ground in 1975. In 1977 the first residents move in.



**1978—**Kendal publishes the first *Directory of Life Care Communities* funded by a grant from the William Penn Foundation. The project continued under the auspices of AAHSA and AARP.

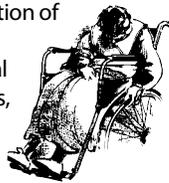
**1979—CCAC.** Kendal partners with nine other Delaware Valley CCRCs to form the Continuing Care Accreditation Association, which became CCAC in 1985.



**1981—Coniston,** a sister community of Kendal-Crosslands, breaks ground in 1980. The first residents arrive in 1981.

**1983—TirLawyn.** An Academic Geriatric Center funded by a three-year \$500,000 grant from Glenmede Trust to integrate research, education and service in the field of aging. Consortium members are Kendal-Crosslands, Bryn Mawr College Graduate School of Social Work and Social Research, Crozer-Chester Medical Center, Thomas Jefferson University, and Widener University.

**1986—National debut of Untie the Elderly.** Kendal made the first presentation of Untie the Elderly, a program to eliminate physical and chemical restraints in health care settings, at the annual meeting of the American Association of Homes for the Aging.



**1987—Values and Standards published.** Values and Standards articulates Kendal’s “commitment to a better way.”

**1989—U.S. Senate Symposium.** Kendal and the U.S. Senate Committee on Aging co-sponsor a symposium on the elimination of restraints in the care of older persons, leading to changes in federal regulations.



**The Kendal Fund** (now Kendal Charitable Funds) is created in support of the Kendal System.



**1990s—Kendal’s growth spurt.** Construction of **Kendal at Hanover** in Hanover, N.H., begins in 1989 and

doors open in 1991.

**Kendal at Oberlin** breaks ground in 1992, and in 1993 the first residents move in.

**1994—Barclay-Friends Hall** joins Kendal family as its first affiliation.

**1997—**Barclay-Friends Hall is renamed **Barclay Friends**, repositions and rebuilds in West Chester, Pa.



Ground is broken for **Kendal at Ithaca** in 1994, and in 1995 the first residents move in.

**1995—**Kendal creates federal-type governance system.

**1996—The Pennsylvania Restraint Reduction Initiative,** administered by Kendal, receives the first of 16 grants from Pennsylvania.

**2001—**With determination and generosity, **Kendal at Lexington** attracts \$3 million in funding and property, and builds the community’s first phase.

**2003—Kendal at Home** incorporated as an Ohio not-for-profit continuing care at home program.



**2004—Lathrop** affiliates with Kendal.



**2005—COLLAGE** program established.



**Kendal at Granville** breaks ground for their community and opens in **2005**.

**Kendal on Hudson** breaks ground in 2003 and opens in **2005**.



**2009—The Admiral at the Lake** joins Kendal. The Admiral at the Lake and Kendal agree to redevelop The Admiral on its existing site on Chicago’s lakefront, slated to open in 2012.



**2011—Collington** affiliates with Kendal. The Collington Life Care Community and The Kendal Corporation affirmed their intention to make Collington the newest affiliate in the Kendal System.

**2013—Chandler Hall** joins the **Kendal System**. The Bucks County, Pa., community serving older adults in the Quaker tradition since 1973, became the 12th member of Kendal’s family of not-for-profit communities and services, now in eight states.

## 'CULTURE OF GENEROSITY' SUSTAINS KENDAL COMMUNITIES

*Philanthropy has played a key role in the development of the Kendal organization. Kendal is led through outstanding service by uncompensated boards of directors for the corporation and the communities. And many projects have come to fruition through generous gifts of time, talent, and treasure from residents, family members, board members, and persons in the wider community.*

**KENDAL AT LEXINGTON** recently received a substantial gift to continue funding for its very successful Music and Memory program from a resident visiting the Borden Skilled Nursing Center who observed the positive reactions residents expressed when listening to individualized musical programming. (Initial funding came from Kendal Charitable Funds.) Recognizing the value of the program and the need for additional funding, the resident made a significant contribution that will allow the program to not only continue, but to expand. He asked that he and his donation remain anonymous.

**KENDAL ON HUDSON's** philanthropic history began well before it opened. A first invitation to the Founder Community created a fund of more than \$50,000 and the Community's first gift was a donation of \$10,000 to the Foundation for the Public Schools of the Tarrytowns, given at the community's ground breaking. Kendal on Hudson and its Resident Association have maintained a commitment to the public schools—providing intergenerational programming, as well as financial support—most recently a gift of \$5,000 on the occasion of Kendal on Hudson's selection by the Foundation as its "Organization of the Year." Kendal on Hudson has also had a robust philanthropic program that has dramatically enhanced its facilities and programs – including an extraordinary garden for its Health Center and several unique programs to support persons with dementia across all its levels of living. Kendal on Hudson is now poised to begin a capital campaign in support of its "Project Renew" — a renovation of its health center, wellness facilities and public spaces to deliver state

of the art care and service to residents using innovative models that minimize traditional skilled nursing in favor of cutting edge assisted living settings, and that create community spaces that support our mission of Together, transforming the experience of aging®.

**KENDAL AT ITHACA** received gifts recently from the estate of the Dowds, residents who were highly involved in the life of the community. Robert died first, then his wife, Janice. The nature and amounts of gifts from their estate were unexpected.

**KENDAL AT HOME** exists today due to the generosity of many within the Kendal family, including Kendal at Oberlin, The Kendal Corporation, Kendal at Hanover and Kendal-Crosslands Communities. All contributed program-related investment dollars to get Kendal at Home off to a great start. The Cleveland Foundation funded research for Kendal at Home through a grant and then provided funding for Kendal at Home's first year of marketing. Over the past 10 years, all of these investments have been paid back to each of these organizations. As a result of this generosity, more than 200 older adults have been served by Kendal at Home.



*Kendal at Hanover resident Shirley Boren donates profits from her handiwork to aid residents in need of financial assistance.*

Shirley Boren, a longtime resident at **KENDAL AT HANOVER**, makes beautiful quilts and needlepoint. Several years ago, she made handbags and sold them to residents donating all profits to the Cadbury Fund to assist residents in need of financial assistance. Her bags produced a very significant gift. The Diversity & Inclusion Committee and the Committee on Gifts & Bequests at Kendal at Hanover have set a goal to fund the

Elizabeth Fry Fund to offer assistance to applicants who cannot meet the entrance fee requirement but have spent their lives in service to others. In accord with Shirley's belief that a gift is best served from the heart and hand, she is offering five items for a raffle sale. The items include a beautiful long needlework vest, a pillow featuring a needlework sampler of a cat with crystal eyes, a quilted Bargello hanging, and two quilted handbags. The Elizabeth Fry Fund has existed for many years; however, both committees realized that little effort had been made to grow the fund. In Kendal's statement of Values and Practices, the importance of entrance assistance is included. The Elizabeth Fry Fund will be the focus of the annual gift solicitation in 2013-2014.

**COLLINGTON** was established 25 years ago in large part thanks to the generosity of Homer Gudelsky, a prominent local real estate developer, who made a gift of 125 acres for the development of a retirement community. Gudelsky's father was a Polish-Jewish immigrant who made his fortune as a junk dealer in Baltimore. The Gudelskys believed in giving back. That spirit of giving continues at Collington today. Each semester Collington awards 10 to

15 scholarships to staff members who are pursuing educational opportunities. Funds come, in large part, from Collington residents. Collington's last scholarship campaign began with a \$25,000 matching grant from an anonymous resident. Collington residents rose to the challenge, and the total amount raised for scholarships was \$61,000.

Market surveys continually affirm the loyalty of the staff of **BARCLAY FRIENDS**, and their commitment to the residents that they serve. This is evident each year in the Staff Campaign, which seeks gifts and pledges from the staff for the Caring Fund. The Barclay Friends Caring Fund exists to provide funds to care for residents whose personal funds have been depleted due to medical costs. Barclay Friends has never asked anyone to leave because of depleted funds. The 2013 Staff Campaign resulted in 89 staff pledging \$5,900 to support the fund. Of special note is the Dining Services Department, which had 100% of its staff supporting the campaign. What makes the Staff Campaign unique is that it is chaired by a staff person and run by a committee of staff who all make the solicitation calls for the campaign.

## CHANDLER HALL'S PHILANTHROPIC CORNERSTONE

### Auxiliary Supports the Community with Time, Talent, and Treasure



The Chandler Hall Auxiliary has been a cornerstone of the community since 1973, shortly after Chandler Hall was founded. From the day Ella Otto hosted the first gathering of the founding members from Bucks Quarterly Meeting, the Auxiliary has consistently carried

out its mission to support Chandler Hall with members' time, talent and treasure. Much of their early work was hands-on. They were Chandler Hall's original volunteers and fundraisers. Auxiliary members helped start Chandler Hall's first child care program and they raised the funds to purchase the first playground equipment for the children, as well as the first manicure station for residents. They brought elderly residents into contact with the participants of Chandler Hall's day care, sowing the seeds that would eventually grow into today's comprehensive Intergenerational

Programming. The Auxiliary has contributed more than \$400,000 for financial assistance to residents who have outlived their resources, which ensures that they are able to remain in their Chandler Hall homes.

Under the leadership of Elsie Wright and Edwina Asch (founding and early members of the Chandler Hall Auxiliary, respectively), and thanks to two generous gifts in the last year from Eugenia Phelps, an early and dedicated member, the Auxiliary donated \$100,000 to a benevolent care endowment created in honor of Chandler Hall's 40th anniversary.



## CONSIDERING KENDAL WITHOUT PHILANTHROPY

### **What would have happened...**

...40 years ago had the Philadelphia Yearly Meeting of the Religious Society of Friends not given Kendal a \$300,000 grant to explore the development of a continuing care retirement community in Kennett Square, Pennsylvania?

### **What would be the character...**

...of each Kendal community were there not the charitable endowments to provide care and services for those who outlive their financial resources, and the very entry into Kendal of those whose lives have been spent in modestly compensated service?

### **To what extent could Kendal...**

...have made such a tremendous impact on ending the practice of using physical restraints in long term care settings across the country without the Emily Wilson bequest?

### **Would Kendal at Lexington exist...**

...had Fred and Isabel Bartenstein not given the beautiful Virginia land on which the community is now located?

### **How much would be compromised...**

...in the affordability of our on-site child day care, and dozens of other programs and physical enhancements across the Kendal family without the generosity of donors?

### **Would Kendal be able to offer...**

...meaningful internships to promising future leaders without the Eugene Perry bequest?

Clearly, the Kendal family has been able to do so much more with important and growing support than without. We serve people we otherwise could not serve; we maintain levels of quality we could not otherwise sustain; we make our communities more affordable to a broader range of people; and we serve as a beacon and advocate for improving standards of care—all because of significant philanthropic support for Kendal's essential work.

The leading colleges and universities are those that have built significant endowments, have attracted strong support for programs and physical facilities, and have been able to make necessary financial commitments to deserving students.

The leading organizations in our field also will be those committed to worthy goals and a degree of excellence that only a strong tradition of philanthropy will make possible. That tradition is growing within Kendal thanks to the generosity of those who live, work and serve in Kendal communities and services and our friends in the wider world.

—John Diffey, President and CEO, The Kendal Corporation

## MEET BEVERLY GROVE, KCF'S NEW EXECUTIVE DIRECTOR



*Beverly Grove, Director for Philanthropy and Executive Director of Kendal Charitable Funds*

Beverly Grove joined Kendal in June 2013, bringing leadership experience in fundraising for higher education, as well as health care experience, to the position.

Previously, Beverly worked in development and institutional advancement for Penn State University, the University of Pennsylvania and as Director of Major Gifts at Bryn Mawr College.

Beverly has a bachelor of science degree in health education from Temple University in Philadelphia. From 1984 to 2000, she worked in health education, sales and marketing for several health care organizations, including Taylor Hospital, HealthSouth, American Red Cross, and Main Line Health at both Paoli Hospital and Bryn Mawr Rehabilitation Hospital in suburban Philadelphia.

## WHY I LIVE AT LATHROP AND GIVE TO KENDAL

Kendal is an important part of my life. As the new Chair of Kendal Charitable Funds (KCF) and a new resident in a Kendal affiliate, my appreciation for the organization's depth and breadth increases every day. As a Board member of KCF, I have had the opportunity to visit over half of our extraordinary communities so far, as well as to learn of Kendal's impressive work beyond them.

My wife and I chose recently to join the Lathrop Community in Easthampton, Mass. We're here for many reasons: our beautiful townhome overlooking a natural meadow, greater proximity to our children, the chance to embark upon a new phase of our lives. But we are finding that the greatest asset is the people, both residents and staff. Interaction with welcoming neighbors who are vibrant and continuing to grow is a stimulant — and a privilege.

I intend to support special initiatives at Lathrop. But I also will continue to give to Kendal Charitable Funds. By doing so, I can play a part in spreading Kendal's mission of "Together, transforming the experience of aging.®" KCF sponsors Promising Innovations and underwrites local and national outreach ventures so that others can benefit from Kendal's ever-expanding knowledge and "best practices." Our track record is a meaningful one, and the future holds exciting possibilities! Find your place in the big picture as well as the local scene. It's the Kendal spirit!

—James T. Dowell, Chair, Kendal Charitable Funds



*(Gift, continued from page 1)*

body is and has been a volunteer, serving in every case without pay. And that is was philanthropy that created the wherewithal to embark upon this journey of service. The foresight, energy, and philanthropy of those who have preceded us have been remarkable expressions of generosity, and have made everything that surrounds us today possible. It is another story, in the distinctively strong American tradition of voluntary activity, of bringing dreams and values to life through philanthropy.

We hope you will find the stories of philanthropy in this publication inspiring and perhaps give thought to how you might work with us to create one of your own.

Gratefully,  
John Diffey, President and CEO  
The Kendal Corporation