

PROFILES in Generosity



WINTER/SPRING 2015

Trees Grow from Gifts to fund Kendal-Crosslands' Arboretum

Gifts to the Kendal-Crosslands Arboretum Fund support the acquisition and care of new trees. For a donation of \$500 or more, a tree can be planted in honor or memory of a loved one. Kendal-Crosslands Arboretum Committee members are pleased to work with anyone interested in donating a tree and will help them select from a variety of trees on the committee's wish list that includes native species to add variety to the arboretum. Gifts of all sizes are appreciated and are tax-deductible to the full extent of the law.

"Most of the KCC campus was populated with non-native trees, so as the foreign ones die they are being replaced with native species," says Barbara Hallowell, who has been a KCC resident for 20 years. A naturalist who has taught many courses on how to identify trees, Barbara says she was consulted about the founding of the Arboretum.

In February 2013, the Kendal-Crosslands Communities (KCC) campus was accredited as an official arboretum. The Kendal-Crosslands Arboretum is thought to be one of the first retirement communities so designated in the United States. Four loop trails introduce KCC visitors to more than 100 labeled trees representing 62 species (www.kcarboretum.org).

KCC has more than seven miles of trails, maintained by residents, through mature woodlands that allow them to stay close to nature. Both residents and staff have created meadows and planted more than 500 woody plants on KCC's 500-acre campus.

Last summer, the National Wildlife Federation (NWF) designated KCC's campus a Certified Wildlife Habitat. NWF officially recognized KCC's efforts to

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Kendal Grant Kick-Starts Elder Abuse Prevention Project in LA

Kendal Charitable Funds awarded a \$25,000 grant to Bet Tzedek Legal Services in 2014 to pilot an elder abuse prevention program within religious communities in Los Angeles. Bet Tzedek is a nonprofit organization that provides free, high-quality legal services to the poor.

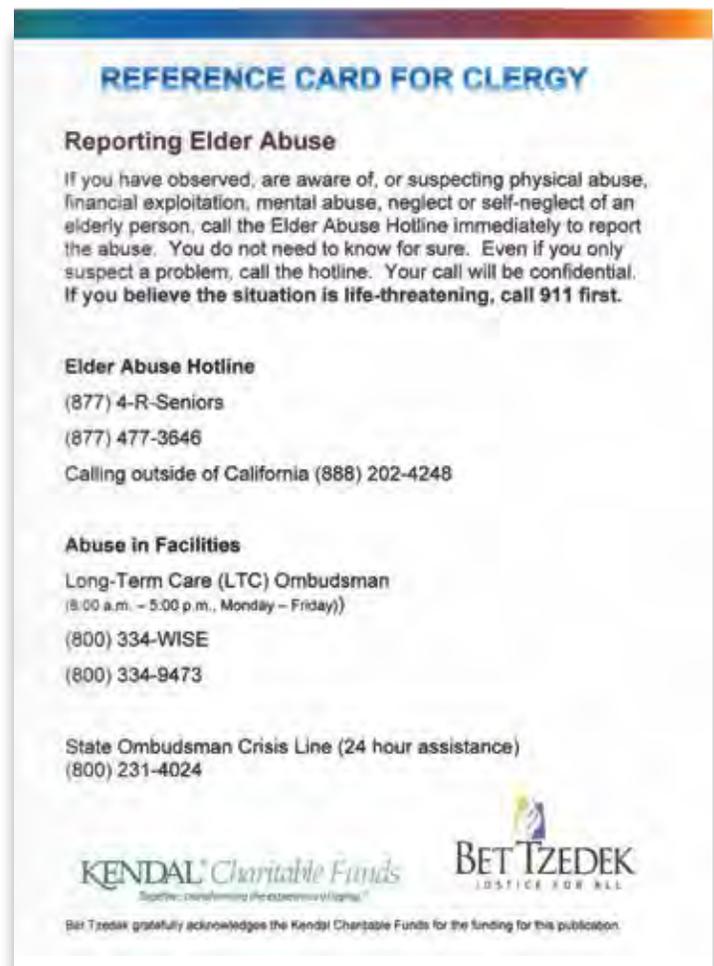
The Lloyd Lewis Promising Innovations Grant seeded the creation of new outreach services by Bet Tzedek in the multi-racial, multi-class community of Koreatown in Los Angeles. The pilot project provided outreach, education and awareness training to diverse religious congregations to help them recognize potentially abusive relationships among their congregants and take appropriate action if they suspect abuse.

Living longer, seniors are experiencing myriad issues beyond health and physical well-being. Growing numbers are becoming targets of financial theft, embezzlement and fraud, as well as physical, emotional and sexual abuse. Often relying on their religious connections as a home base for social support, seniors are extremely vulnerable to fellow congregants who seem trustworthy but are, in fact, predatory.

Bet Tzedek engaged more than 40 religious organizations in dialogue about the project and the needs it was created to address. As a result of that outreach Janet Morris, Project Director, gave 14 elder abuse recognition and prevention training presentations, reaching roughly 120 clergy. She also provided a range of materials to facilitate further education within their congregations and throughout the community, including sample meeting invitations and agendas, a laminated reference card, a copy of her PowerPoint presentation, and copies of elder law guide books.

“We are grateful to Kendal for recognizing the need for this project and its potential to help seniors across the country. We are also thankful to work with a network of religious organizations committed to protecting and assisting their elderly congregants and caregivers,” said Sandy Samuels, President and CEO of Bet Tzedek.

A panel of leading experts on aging selected Bet Tzedek’s proposal for funding from among more



than 130 initial applicants and 40 finalists from across the nation, all seeking grants for model projects to prevent elder abuse. Projects that fit within these parameters are in keeping with Kendal’s Values and Practices.

“Kendal’s pursuit of better ways to address the unmet needs of older adults, coupled with the generosity of the Janet Comey Foundation, Kendal residents, board members, staff and others outside Kendal, led to the creation of the Lloyd Lewis Promising Innovations grant program,” said Beverly Grove, Executive Director of Kendal Charitable Funds. “Promising Innovations grants provide an opportunity for greater collaboration among those of us who seek to improve the quality of life and care for all older people.”

\$30,000 challenge gift given to preserve Lexington's historic Sunnyside House

A Rockbridge County, Va., couple has donated \$30,000 to Kendal at Lexington to preserve and enhance Sunnyside House, which is listed on the National Register of Historic Places. The donors wish to challenge others to follow their lead and contribute to the Sunnyside House Fund. Many Lexington-area nonprofit groups, as well as Kendal at Lexington residents, use Sunnyside House as a guesthouse, meeting space and a venue for special events.

"It's a jewel for the Lexington community that's used for meetings, entertaining and for exhibits by local artists and craftsmen," say the donors, who

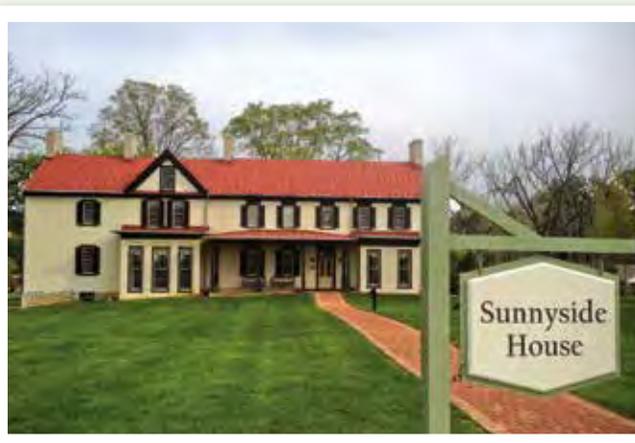
wish to remain anonymous. "We hope that our challenge grant will be equaled, or even exceeded, by other area residents."

Sunnyside is a rare, Federal-style farmhouse nestled in the heart of Kendal at Lexington's campus. The oldest section dates back to the 1790s. Isabel and Fred Bartenstein — the daughter and son-in-law of VMI professor and dean Col. James A. Anderson, who bought the property in 1926 — generously

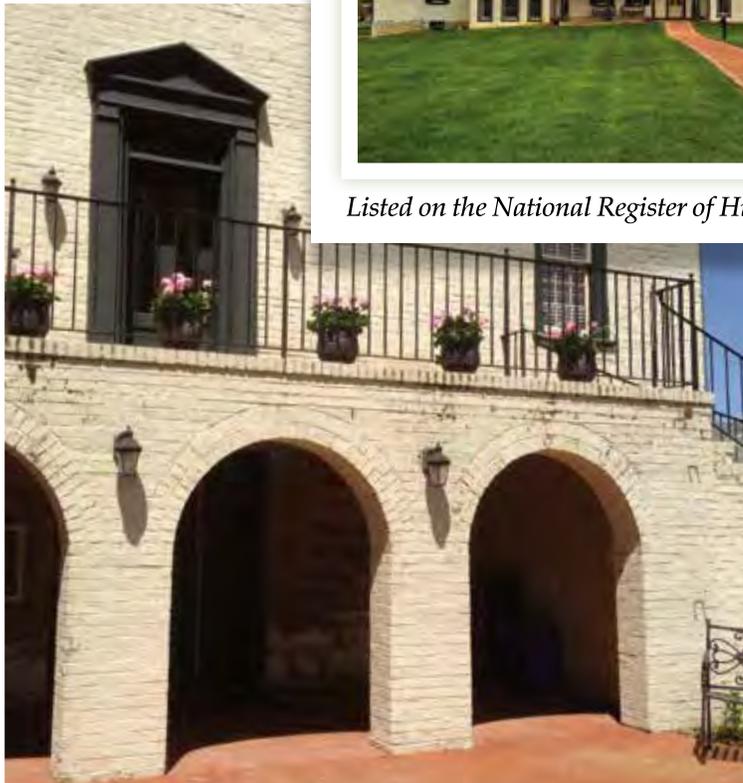
donated the charming home and 85 acres of pastoral land to Kendal at Lexington in 1999. The Bartensteins also made a substantial donation that paid for the restoration of Sunnyside House, which was completed in 2006. A committee of Kendal at Lexington residents then furnished the home with donated pieces.

In April 2013, Kendal at Lexington residents and staff opened Sunnyside's doors to visitors from across the state as part of Virginia's Historic Garden Week organized by the Garden Club of Virginia. Sunnyside and four other Lexington homes were featured on the April 27 tour.

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Listed on the National Register of Historic Places since 2002.



Leaving a Legacy

—by Kendal at Oberlin resident Marjorie Porter

It was May as I wrote this, and spring was leaping to belated life after a brutal winter. Larry and I were celebrating the anniversary of our move to Kendal at Oberlin. And we were mourning the loss of Dave Clark, for whom I worked in my first job as a development officer at Oberlin College in the late '70s, and without whom Kendal at Oberlin would have remained a dream. It's hard to express how fortunate we feel that such a place exists and that we are privileged to be part of it. We are the beneficiaries not only of Dave Clark's brilliant and indefatigable work, but of the legacies of many other dedicated founders and donors to Kendal.

While we have many opportunities to support Kendal through our present gifts of service and money, most of us are constrained by uncertainties regarding our future needs. So Larry and I decided to make a bequest to Kendal at Oberlin, a gift from our resources when we won't need them anymore. The simplest way to do this for anyone who has an IRA or other tax-deferred retirement fund, is just to change the beneficiary form, leaving a portion of the fund to Kendal, and if one wishes, to other charities. Not only is it easy, not even requiring a change to one's will; it benefits our individual heirs.

Many people do not realize the importance of deciding which assets should go to their heirs and which to charities. Individuals who inherit IRAs and other tax-deferred retirement funds must pay income taxes on these bequests, but charities receive the full amount tax-free—and individual heirs who receive bequests from other assets pay no income taxes.

Larry and I decided to share our story in the hope that other residents and friends might wish to join those who have already made a will commitment or other planned gift to help ensure the financial strength of Kendal at Oberlin in good times and bad, and to help address the increasing need for support from the Residents Assistance Fund. Your financial adviser can answer any questions you may have, or you could call your community's Executive Director or Chief Financial Officer, who will put you in touch with the right resource.

Knowing about the will commitments residents and friends have made helps Kendal plan ahead. And we were pleased to learn that Kendal at Oberlin expresses appreciation for planned gifts through its Legacy Circle of Friends, whose members are comprised of those who have made their will commitments known.

Planned Gifts

Thoughtful planning can help each individual find the right way, and the right time, to make a special gift to support your community.

These are bequests or gifts made over a period of time, and are structured to meet your specific financial objectives while ultimately benefiting your Kendal community.

Some planned gifts can offer significant advantages of favorable income, as well as savings on capital gains and estate taxes.

How you can plan now

Contact your financial advisor

Find out if a CGA is the most advantageous gift given your current financial circumstances.

Talk with your community's Executive Director

The Executive Director of your Kendal community, or Beverly Grove, Director for Philanthropy at Kendal, may be able to offer guidance.

Reflect on your values

Consider gift options that will not only address your family priorities, but also leave a legacy and secure the future of your Kendal community.

Together, transforming the experience of aging.®

KCF AFFILIATE GRANT PROGRAM

Kendal Charitable Funds, established in 1989, raises and disburses funds in support of Kendal's charitable purposes, including many outreach efforts. In 2014, the board of Kendal Charitable Funds (KCF) approved a grant program for those affiliate communities desiring to initiate inventive programs that enrich the lives of older adults, whether within or outside of their respective communities and that include, in some form, the involvement of Kendal residents. Below is a brief snippet of how each affiliate has used the grant.

THE ADMIRAL AT THE LAKE

... THE ADMIRAL AT THE LAKE REENERGIZED: The Community has applied for funds to expand the size of its fitness area to include: additional exercise and fitness equipment, additional instruction or class variant, additions to the meditation and spiritual space, additional AED's, and perhaps for further mental and individual wellness, i.e., stress reduction, coping, grief, and end of life.

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Trees Grow from Gifts to Kendal-Crosslands' fund

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create outdoor spaces that improve habitats for birds, butterflies, frogs and other wildlife by providing essential elements needed by all



wildlife, including natural food sources, clean water, cover and places to raise young.

"We've added numerous meadows over the past years, and they provide secure nesting places for song sparrows and abundant food sources for butterflies and insects," said Mark Swick, KCC Grounds Supervisor. "Our forests are wonderful havens and home to wild turkey and many bird species, such



as the scarlet tanager, wood thrush, ovenbird, veery and various owls."

Lexington's historic Sunnyside House preservation

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Visitors strolled through the farmhouse's rooms to see the stunning floral arrangements designed by the Blue Ridge Garden Club. They admired the original woodwork, antique furnishings and unique curved staircase before enjoying refreshments on the patio. Sunnyside's "Secret Garden," a tranquil space surrounded by boxwoods, was a favorite stop for visitors. Last summer, Sunnyside House was a stop on the Lexington Art Tour.

Community groups ranging from the AARP Driving Class and Alzheimer's Association to the Parkinson's Disease Support Group, Rotary and the Rockbridge Area Hospice meet in Sunnyside House. Baby showers, birthday celebrations and weddings also are held there.

"Sunnyside is a vital part of the Lexington community, and its heritage is long and deep," says Mina Tepper, Executive Director of Kendal at Lexington. "The \$30,000 donation we have received has already helped to repair a chimney and section of the roof, and will allow us to repaint Sunnyside's expansive tin roof. But much more needs to be done to preserve its architecture, including maintenance of external woodwork and sidewalks and painting upgrades inside."

Those interested in making a donation to maintain Sunnyside House as an asset to Rockbridge County should contact Becky Edmondson by email at bjedmondson@kalex.kendal.org or by phone at (540) 458-3782.

KCF AFFILIATE GRANT PROGRAM *(continued from page 5)*

BARCLAY FRIENDS

...MY LIFE, MY LEGACY: Paula Wagner, Ph.D., has developed a storytelling interview and video process for older adults that is part biographical and part legacy work. Barclay Friends proposes to provide this storytelling experience to six Barclay Friends residents and six West Chester Senior Center members, over the course of 12 months. Our hope is that, through this shared experience, connections between our Community and the Senior Center will be created.

CHANDLER HALL

... OUTDOOR INTERGENERATIONAL EXERCISE AND FUN: We seek to create an intergenerational playground to be used for recreational as well as exercise programs that engage youth and elders at the same time. The first overarching goal will be to create written modules/protocols that teach care partners how to safely and effectively use intergenerational playground equipment (e.g., stepping up on a swing), and to roll out the program campus-wide and perhaps system-wide. This project will help Chandler Hall develop best practices for clinical recreational care.

COLLINGTON

... CREIGHTON CENTER ROOFTOP GARDEN: This project will give residents of the Creighton Health Care Center an appealing space to enjoy the outdoors. The area will include a shaded seating area, benches, tables, raised wheelchair accessible garden beds, and a green roof with paths.

KENDAL AT GRANVILLE

... INSTITUTE ON COMMUNITY ENGAGEMENT: Kendal at Granville proposes to organize annual symposia that seek to foster wider interactions between Kendal residents and various organizations in the Granville and Licking County community. In each year of its operation, the Institute will focus its symposium on a different aspect/problem/activity within the broader community.

KENDAL AT HANOVER

... INTERGENERATIONAL PROGRAMS: When we create opportunities for residents and children to interact in planned and meaningful ways, we are increasing quality of life for residents and supporting children's healthy, early childhood development. This Grant will allow us to expand IG programs, as well as study and document the improved quality of life for residents and support children's education.

KENDAL AT HOME

... CONTINUING CARE AT HOME—A MODEL FOR DEMENTIA CARE: Care of people with Alzheimer's disease could be significantly improved if care partners have the proper tools and techniques for helping people with cognitive impairment live their lives to the fullest, engage in meaningful activity, maintain life roles, communicate their needs effectively, and express their desires related to their care.

KENDAL AT LEXINGTON

... RAIN BARRELS: Kendal at Lexington proposes the purchase of rain barrels to use on our campus and distribute to the greater community, half to be placed on campus; half to be placed in the community. We will work with the local Master Gardeners to determine the best locations, including Rockbridge County's chapter of the nationally known Roots & Shoots program at local schools.

KENDAL AT OBERLIN

... KEEP ON MOVING OBERLIN—BALANCE AND MOVEMENT FOR SENIORS: Kendal at Oberlin, including its administration and its Residents Association, will organize and cosponsor a series of four, free fairs for residents and other seniors from the Oberlin area to share information about balance, mobility, use of assistive devices, and programs to help them as they encounter difficulties in getting around.

KENDAL-CROSSLANDS COMMUNITIES

... KENDAL-CROSSLANDS ARBORETUM ARRIVAL EXPERIENCE: This resident-led project will serve to add trees to the Kendal-Crosslands Arboretum, with an emphasis on the entryways of Kendal at Longwood and Crosslands. At Crosslands, this will entail a dogwood tree collection planted along the main road from Route 926 toward the center.

KENDAL ON HUDSON

... FRIENDS OF MEMORY CARE RESIDENTS: Kendal on Hudson's memory care "neighborhood" is scheduled to open in late 2015. The mission of the new neighborhood is to create an atmosphere of joy and growth and to enhance well-being and meaning of life for Kendal residents who face the challenges of dementia.

LATHROP COMMUNITIES

... REMOVAL OF INVASIVE PLANTS TO PROTECT NATIVE PLANTS AND WILDLIFE: We are determined to protect our "natural" lands for the enjoyment of our residents and the survival of our insects, birds, turtles, bobcats, and other creatures. Scientific research indicates that invasive plants support very little wildlife, so we have contracted with Polatin Ecological Services for the invasives removal. Polatin will use the most ecologically conservative methods.