

## *Kendal at Longwood, The Founders' Vision*

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Harry Hammond

12 pt version of 50<sup>th</sup> Anniversary Talk

*Note: Yellow slide title shws when that image was shown*

[#1 title slide] We all know that those who want an organization to be “tax exempt” must get Internal Revenue Service approval. Here’s what Kendal’s founders put on their IRS application.

[#2 Kendal’s First Statement of Purpose, 1972)

“... to build, own, operate and maintain residential, medical and intermediate care facilities specifically designed, planned and equipped to meet the physical, emotional, recreational, social and religious needs of elderly persons; and to provide lifetime medical and nursing care for such persons and to furnish, to the limits of its ability to do so, financial security for persons who have been admitted to such facilities by maintaining at less than the regular charges any resident who becomes unable to pay such charges and by operating such facilities at the lowest feasible cost.”

The IRS approved. With incorporation, the founders became a Corporate Board. Corporate boards usually think of their mission statement as a brief summary, phrased in broad terms, of the purpose, aims, and values of the organization. Although I didn’t find any Kendal statement from the 1970’s titled “mission,” the KRA archives includes a long 1982 statement that uses these phrases: [#3 Kendal-Crossland Mission Statement, as of 1982, abbreviated]

- self-supporting lifecare... (refers to the insurance aspect of Kendal’s business model)
- guided by Friends principles
- managed by an independent Quaker board
- offering independence, security, and a continuum of health care
  - at reasonable cost
  - which fosters the growth of residents and staff toward their full potentials

Thirty-five years later, after two corporate re-organizations, KCC published a more compact “Purpose and Mission” statement. [#4 Kendal Purpose/Mission as of 2007]

"It is the purpose of Kendal-Crosslands Communities, a not-for profit charitable organization, to provide services and communities for older people in accordance with the principles of the Religious Society of Friends."

This evening, I invite you to appreciate Kendal at Longwood through a somewhat different lens, the lens of VISION.

In corporate-speak, VISION is “the answer to the question, ‘What does it look like when the organization is pursuing its mission?’” Typically, mission and vision help a board and the

board's executive leader identify shorter term goals and how to achieve them. When looking in the other direction, from the present into the past, "vision" (or a failure to be led by one) comes into focus by studying the organization's policies, stated intentions, board agendas, actions, budgets, CEO evaluations, outcomes, and so on. As I show you what I found and what I learned, be aware that the available records, like those of our lives, are far from complete.

But thanks to earlier residents and to Barbara Parsons, Sara Hill, Charlie Hill, Merritt Cleaver, and many others, we do have newspaper clippings, publications, reports, KRA meeting minutes, and more in the KRA archives. I also tapped my memory of conversations, as far back as 1973, with two of the founders: Barbara Jones (the first resident who moved into Kendal) and Joanna Savery, who came onto the Kendal board during the time this building was being constructed.

**[#5 Kendal Rising 1972]** I knew nothing about the project 50 years ago, even though I read the Wilmington News-Journal every day and interacted with area Quakers, including adults and teenagers who lived in the Kennett area. We were together at Wilmington Friends School, where on that day I was four months into my first year on the staff, teaching European history, political science, and economics. Before the end of that school year, my ears were taking in bits of information about what was happening up route 52, near the intersection with Route 1.

Joanna Savery and her husband Ted – he was my boss – thought Melody and I should know about Kendal. At school events and in their home, they recommended we not wait too long before putting our names on the waiting list. I often followed up with questions – not out of deep curiosity, but rather to narrow Ted's opportunities to talk me into taking on other roles at the school. Melody was 25 that year. I was a few years older.

Years later, after I was given Ted's position, I looked forward to one chore that put me on route #52, headed north. Barbara Jones, who had been Kendal's first resident, needed rides from Kendal to the school and back, for special events. During those 25-minute trips, I should have been telling her about projects at the school that would benefit from a generous donation. Instead, I listened to her stories about life at Kendal.

As some of you whose parents lived here may also have done, Melody and I eventually got on the waiting list, and decades later moved to Kendal without giving any other CCRC serious consideration. We didn't feel at all reckless. What we knew, which included Kendal's reputation for cutting edge practices, had hooked us years before.

Barbara Parson's prose in "An Act of Faith; the Kendal at Longwood Story" tells the story of those early years. She wrote that booklet for Kendal's 15<sup>th</sup> anniversary, in 1988, for her boss.

**[#6 Lewis head & shoulders]** Lloyd Lewis, Kendal's first Executive Director, wrote this in his introduction to that booklet. **[#7 Lewis two sentences from Act of Faith]**

"The development of Kendal at Longwood is a story of community-building, accentuating the interdependence of all participants. If we can keep this same dynamic alive..., Kendal will remain one of the foremost continuing

care communities in the United States.”

Note that Lewis used the phrase “INTERDEPENDENCE of all,” rather than “interaction of all.” The choice of words seems important. Also note his use of the conditional, “IF.”

Lewis’ at that time – 15 years after being hired to lead the development of Kendal – seems to have been reflecting on how best to set Kendal’s course for the years ahead. During its first 15, Kendal created a second community, Crosslands; merged the two; and established partnerships with groups in two other states who wanted what Kendal had to offer. Kendal was also managing other senior-care organizations by contract in Southern Chester County and beyond.

My guess is Lewis realized that the “interdependence of all” that had developed at Kendal at Longwood during the seventies had become less robust. KRA board minutes for ’87 through ’89 reflect that same concern. The one-campus project had become a two-campus operation, then a four-campus, multi-county operation, and then a multi-state operation. It was about to become a multi-corporation operation. Business experts, then as now, knew that “the greatest trigger of organizational failure is success.”

Among the founders, Lewis and Alan Hunt seem to have been the most visionary. At Pendle Hill, the Quaker residential study center near Swarthmore College, Lewis had been business manager, acting director and, briefly, director. There and at Tanguy, where he and Eliza lived, he gained experience with leading from within community. Tanguy, also developed on what had been a Quaker farm, is still a Quaker-founded, interracial, interreligious, intentional community, where homeowners lease the land, co-use and care for a pond, a community center, activities, and each other. As at a Quaker Monthly Meeting, those families trusted that wide participation in decision-making produces optimal outcomes. Lewis had also worked with the American Friends Service Committee and in the steel industry. “Interdependence of all,” if you don’t already know it, is one of the best three-word descriptions of a Quaker Monthly Meeting Community.

Though a large business, with health-care at the core, Kendal, like Tanguy and Pendle Hill, was also a Quaker experiment in community. The founders made it so. Four days ago, Beryl Goldman told us about Kendal’s bold and impactful “Untie the Elderly” initiative. Regarding Lewis’ vision for Kendal, I think it mattered more than we could possibly document, that his career had not Included time at a senior health-care organizations. At that time, many of them were under-resourced and understandably paternal in their work with residents, most of whom probably expected to be treated as patients rather than as partners. Unlike the leaders of other CCRC’s and most of his successors at Kendal, Lewis did not see Kendal’s path to be competing with other organizations by becoming more like them. His vision was for Kendal to model better ways to tease the ageism out of aging; to encourage and support authentic community; and to minimize the institutional features of CCRC living. Even Kendal’s simple, ungated entrance on Route 1 communicated that.

We know from Lewis' early publications that Kendal would be peopled by as-few-as-possible administrators and staff, and about 320 seniors who, supported by its facilities, staff, and services, would develop a self-governed and self-funded "community." There'd be no activities director here. Residents would be expected to decide for themselves, through their residents association, the features of community life. Each resident, no matter one's health status, was to be part of the community, into which employees would come and go, each person warmly relating to the others. There'd be no separate staff restrooms or lunchrooms. Staff would freely use any of the resident-emanaged parts of the Center, including lounges, library, weaving room, woodshop, pottery studio, and the grounds.

Lewis and his staff learned a lot from the young Foulkeways CCRC, located northwest of Philadelphia, which also was sponsored by Philadelphia Yearly Meeting's Committee on Aging Friends. Alan Hunt, at that time, was legal counsel for Foulkeways and clerked the PYM committee. The Quaker founders of each surely knew each other and interacted at Yearly Meeting. Both Joanna Savery and Barbara Jones told me that Kendal aimed to be more affordable than Foulkeways. The 1972 minutes of the Committee on Aging show similar hope and concern, in not at Kendal, than at least in its future projects.

*[#8 Committee on Aging Minutes 6-6-72, ML, FW, K ways to have economically diverse residents]*

Instead of only offering help with entry fees, as was done modestly at Foulkeways, Kendal developed – this is a quotation from another document – “a comprehensive fee structure which socializes costs in such a way that people of lesser means are able to join.” Foulkeways, as you can see here, depended entirely on resident contributions for that type of support. Medford Leas, for some applicants, excused part of the “down payment,” what we call the entry fee. This slide shows Alan Hunt's description of those options to the members of the Committee of Aging. At Kendal, the founders chose three other ways to set conditions for economic diversity:

1. A quarter of all the residential units were to be studio cottages.
2. Minimizing costs was a second way forward. After the first cottages were built (those closest to the barn), the designs were changed. The first (and perhaps a few others?) had partial basements, to accommodate oil tanks, and steel posts along the covered walk. And the roof over that walk was a handsome continuation of the roof line. Switching to wood posts saved money, as did separating the structure over the walk from the roof of each cottage, and making those walk covers flat.
3. Kendal, as Barbara Parson's describes it in “An Act of Faith,” wanted to, I quote, “widen the circle by developing new communities,” and in doing so, guide the emerging continuing care industry into countering ageism.

Kendal did that widening within its corporate structure, opening Crosslands and then changing the organization's name to Kendal-Crosslands Corporation. Foulkeways, in 1990, did the opposite. The Foulkeways Corporation, for example entirely separated itself from a promising life-care program that their executive director had designed. That separate corporation, years

later, became Friends Life Care at Home. At about the same time, Kendal-Crosslands was discovering some of the challenges of having “widened the circle.” That circle now reaches all the way to California, where a new Kendal will soon welcome residents.

**[#9 Reporters]** The most comprehensive and vivid display of the Founders’ short-term vision is what we see in the issues of the Kendal Reporter before it became a KRA publication. Lewis recruited Martin Klaver – the retired editor of Wilmington’s News Journal – to create these monthly bulletins. Particularly in their tone, the Reporters conveyed the qualities of “interdependence of all” that Lewis valued. Klaver addressed the readers – those on the ready-to-move-in and waiting lists – as community members, as insiders, rather than as customers. The implied message was, “we’re on this adventure together.”

Klaver surveyed and reported out the recreational interests and religious identities of residents; passed on stories of particular residents; reported each of the first hires and the person’s background; and kept everyone up-to-date on construction progress and problems. He also told stories, including surprises such as the problem of how to handle the large number of visitors and curious locals who just dropped in, wanting to be shown around.

In straight forward ways and in between the lines, the Reporter simultaneously communicated that governance and management were in place. Lewis and Klaver used the term “management” rather than “administration,” perhaps to stress one’s function rather than one’s status – a Quaker practice. Those single-page, tri-fold bulletins displayed a friendly, confident, truth-telling, non-guarded management team – peers working together.

Lewis, in effect was letting every reader know that he was open, that trust existed, that creating Kendal was and would continue to be a highly-participative venture, and that all would be able to join in the work of serving and being served, and of sharpening the vision. With Klaver, he portrayed Kendal as a process one could join rather than as a product to be bought. He was laying the foundation of community even before the first building was completed.

The Reporter also introduced readers to a distribution of authority that some would not have expected. Management, of course, would manage, overseen by the Kendal Board. Residents would choose board members for their residents association, and, without any role for management, would further evolve their association.

Some of the to-be residents were on the payroll or otherwise compensated. Martin Klaver, for instance, seems to have been Lewis’ one-man Marketing/ Communications/ Public Relations Department and also the security person, living on the campus. Barbara Jones, moved in early in exchange for being willing to show her cottage to prospective residents. An admissions committee (mostly Kendal Board Members) interviewed residents and later welcomed the newcomers in person, first with roses in beer bottles and the following year with a visit to each of their cottages. It was a Pendle Hill type barebones staff, all of whom focused on opening the way for each resident to live to their fullest potential.

**[#10 Zoning Plea Heard, Wilmington News Journal]** This News Journal article reports that Kendal expected to have 60 to 80 employees. But as of the day it opened, there were nearly 100 staff members.

If you don't already know it, Quakers value simplicity, one aspect of which is putting resources to good use, with minimal waste. Thirty-seven percent of the 262 individuals who had been admitted as of July 1973 were members of the Society of Friends. They were probably very happy to see that the one-page, front and back, trifold Reporters were simple, distinctly non-commercial. Each issue conveyed Kendal's intended character. I don't remember seeing any photographs in them, just line drawings. The print was small. The paper was cheap. No envelope was needed. In every way, the Reporter was a community newsletter.

**[#11 Kendal Lounge 1973]** Via the Reporter, Lewis and Klaver also prepared residents to expect an intentionally not-fully-furnished, unadorned, main building. The issue of the Reporter that invited incoming residents to donate rugs and furniture noted that the residents association would make decisions about which pieces to use, and where. Between the lines, Lewis set conditions for acquaintance and participation to bloom. Perhaps with Pendle Hill in mind, he seemed to want it clear that the residents association and the KCC board, though separate, would cooperate, and that Kendal would be a hands-on community, not a resort where everything would be done for guests. The Reporter also explained why Kendal – unlike other CCRCs, used an “admissions” process rather than a “sales” process.

By explicitly stating in one Reporter that he hoped residents, too, would want an independent residents association, Lewis also prepared residents to accept the authority of the Board of Directors and management for other matters. There had not been that clarity at Pendle Hill.

Those of us who have served on the KRA Board know that the KRA Bylaws announce its two purposes, the first of which, as of November 1973, when the residents formally adopted the Bylaws, is:

**“To promote and further the common interests of the residents.”**

The Kendal Board adopted complimentary Bylaws, which declare that, “The Residents Association shall govern itself, separate and apart from the Corporation” and that the Residents Association “shall adopt its own respective bylaws.” In 2002, the KRA Board tweaked its #1 statement of purpose to read,

**“To promote and further the interests and welfare of the residents.”**

That change came after Pennsylvania codified the right of CCRC residents to form and operate a residents association. Perhaps the legislation motivated the change.

At Kendal, from the start, the governing board and Lewis wanted residents to have agency, to have a role in planning and in decision-making. Beginning in 1988 (the year Lewis wrote about

the “interdependence of all” being necessary for Kendal’s long-term success), The Kendal-Crosslands Board began a re-organization process that unfolded over the following five years. By the end of 1988, and until 1997, the point person for residents of Kendal at Longwood was Joe Lydon, who, until 1992, reported to Paul Lewis (the “Director of Operations”), who, in turn, reported to Lloyd Lewis. The KRA and, it seems, many residents were less than satisfied with the announced parts of the reorganization plan. It would further distance them from Lloyd Lewis and from the members of the Kendal corporate board, half of whom began meeting as a committee of the full board, overseeing the four local communities. Although it’s not clear in the records, it seems that resident concerns may have slowed down the re-organization.

A listening and planning process was deployed to thresh through concerns. The KRA and the Governing Board led their separate processes, each reporting to the other, until the Governing Board decided it was time to close the dual process. The KRA’s minutes imply that the KRA Board members realized that they had no standing in the matter, other than to provide their input.

Regarding the KRA’s autonomy and authority, here’s an important KRA Board minute, from 1974 (two years after Kendal opened). It identifies what I think has been the KRA’s major vulnerability. *[#12 KRA Autonomy & Credibility]*

“Eugene Perry – KRA President that year – commented favorably on the amount of autonomy the Residents Association has and urged that the Association not impair its credibility by allowing individual groups to feel that they can exert more influence on management than another group, and that management should be urged to discourage such action. Problems should be brought to the Association and be discussed in a democratic way.”

Residents and their KRA, over the following decades, seem to have forgotten that advice.

After Lewis no longer directly managed Kendal at Longwood (1985, and more so after 1988), resident committees increasingly took their individual concerns and their committees’ wants and needs to the Kendal at Longwood administrator (Nora Adelman, later Joe Lydon), rather than to the KRA, unintentionally undermining the KRA Board’s ability to be “responsible” for the resident community and in that role also represent the resident community to management. Lewis was no longer up the hall, to re-direct, to the KRA Board, the residents who wanted to bypass the KRA. The “interdependence of all” was devolving into resident and KRA dependence on management.

*[#13 KRA work with Lewis 1975]*

Lewis’s concept had been that KCC and the KRA were to be independent of each other, financially and otherwise, except when there was mutual interest in working together on projects that fell between or crossed into the other’s area of responsibility and authority. Lewis had provided start up furniture for most of the areas that were to be managed by the KRA. In line with that concept, he had asked the KRA to assign and oversee the uses of those



spaces going forward, and also to pay for improvements that the KRA wanted. The KRA did take the initiative when improvements were needed and the KRA paid for most of what the KRA wanted (the long list of examples is an eye-opener).

Repairing and opening the swimming pool and sorting out how to pay for the repairs and a lifeguard was the first major test of the ability of the two independent organizations to work together. Lower costs to KCC meant lower resident monthly-fee increases and, theoretically, a more affordable community. When the KRA Board hoped for an improvement that would require on-going, rather than a one-time, expenditure, Lewis and the KRA Board usually found a way to share the cost, as was done regarding the pool.

#### **[#14 Trip to the Center]**

Here's a later example of the two organizations cooperating. The average age of residents when Kendal opened was 75. That average increased over time. In 1991 or 1992, Kendal purchased this tipsy looking vehicle to transport residents to the Center, those who couldn't get there on their own. Residents, being billed \$13.50 per round trip, asked the KRA Board to discuss their concerns. **[#15 KRA subsidizes resident trips to Center, 1992]** The founders had not anticipated that such transportation would be wanted or needed. They thought mobility-challenged residents would instead want to move into the Health Center. It seems that Joseph Lydon, the KAL administrator at that time, was open to lowering the per-ride cost if the KRA would chip in some money to further lower the per-ride cost.

Subsequently, and with only occasional exceptions, the KRA tolerated residents and resident committees taking their wants and needs directly to management, rather than asserting its role in addressing such matters. KRA non-involvement resulted in even more residents and KRA committees going directly to management or to particular staff members for wanted equipment, supplies, and other items. Lewis' orderly separation of KCC from KRA, which empower the KRA, was dissolving.

Overall, however, the "interdependence of all" that Lewis nurtured did produce outcomes that all organizations hope for. At one point in the 1970's, the Kendal waiting list had over 1,000 names. Staff members often stayed for decades. Their children came to work here. And they recommended Kendal employment to other relatives and neighbors. Residents donated generously and made large bequests. And Board members became KCC residents. Among them were Joanna & Ted Savery; their children Sylvia and Joe; Sally Worth and her daughter Lark, and others.

Alas, at KCC, the early and highly successful interdependence of board, residents, and staff proved to be a delicate construct. In the CCRC industry, management often minimizes the interaction of board members and residents, unlike in smaller Quaker-founded organizations. At CCRCs, visioning and planning are typically done more "for" rather than "with" residents. And executive leaders—this is true across the nation, not just in our area—increasingly come to CCRCs from other CCRCs, or from other sectors of the health-care industry, or hospitality industry, where the clients are not clients until death, are not highly invested in the



organization, and don't expect to have services provided in ways that respect and expand one's independence and autonomy.

Near the midpoint of his time at Kendal, 1981, Lloyd Lewis introduced, in the Kendal-Crosslands annual report, what he titled "Some General Principles." These to me represent a sharpening of the original vision:

*[#16 Some General Principles 1981]*

1. The communities are good places to live when they are good places to work....
2. Employees are responsible for creating a friendly, non-institutional climate which supports the pursuit of excellence.
3. Residents are responsible for the cultural and recreational life of the communities.
4. Services are designed to enhance autonomy, not usurp it.
5. Mentally impaired residents will not be segregated or isolated for service....

Notice principles #3, #4, and #5. These carry forward the Founders' vision and what made Kendal distinctive among its peers. The last three boldly declare what was achieved here. Six years later, Kendal's 1987 vision statement states,

"In all matters between board, management, and residents,  
We strive for clear and open communication."

In the comparable 2018 document, the terms "all" and "strive were dropped. The reworked sentence reads this way:

"Through a broad interaction among residents, staff, and boards... trust  
and understanding grow from open communication and listening."

A measurable principle had been replaced by a general observation.

The founding Board and founding residents did strive for and did benefit from clear and open communication, very much as happens in Quaker Meeting communities, where listening to one another is expected and differences are acknowledged and explored in the course of discernment. One circumstance at KCC that might have contributed to the breakdown of what in 2018 was described as "Broad interaction among residents, staff, and boards" is that none of KCC's administrators and department leaders, so far as I know, have the advantage of having led or worked at another Quaker organization, before coming to KCC.

What is clear to me is that important aspects of Kendal's original community-based, Quaker-influenced culture withered here. Covid disrupted what remained. But the bones of Lewis' social design for Kendal at Longwood still exist: the village; the Center; Kendal Monthly Meeting; the integrated, high-quality health care; staff/resident relationships; the KRA's Bylaws; and resident respect for and support of one another.

Although the "interdependence of all" that Lloyd Lewis saw to be essential to Kendal's future is less evident now, the organization that he and the founding board created, and The Kendal

Corporation that Lewis and the Kendal-Crosslands Board of Directors later created (in 1988), survive. We are members of a Kendal System whose mission is “Together, transforming the experience of aging.” We have an administration and staff that aspire to plan “with us” rather than “for us,” and after a long period of low occupancy, a full complement of residents (400+ at KAL).

In October, we’ll formally celebrate Kendal at age 50. Hopefully, KCC Board members and staff will join us. For now, it seems appropriate to say (as Suzanne Stevens might), “Let’s give Kendal a big hug and a pat on the back.”