

VALUES *and* PRACTICES

New photo

KENDAL CROSSLANDS COMMUNITIES

The Kendal idea was initially made possible by a generous grant from Philadelphia Yearly Meeting's Committee on Aging in the early 1970s.

Since then, Kendal Crosslands Communities has worked to transform our culture's view of aging and of older persons, stressing the potential for fulfillment and continuing contribution during the later stages of life.

While remaining firmly grounded in the Quaker values that animate our activities, Kendal Crosslands Communities continue to move forward. Our programs and services work to develop new practices and models to better serve older adults.

The deep roots that sustain KCC are found in *Values and Practices*. They help ensure that KCC residents and staff share the spirit of community and collaboration and the respect for each individual that flow from the principles of the Religious Society of Friends.

Values and Practices, is a revised version of *Values and Standards*, first published in 1987.

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This statement of Values and Practices reflects experience gained over many years and is a result of the vision and dedication of Kendal Crosslands community members, board members, staff, and colleagues in our field. We are grateful to all those who have contributed to the development of this revised statement.

ABOUT KENDAL CROSSLANDS COMMUNITIES

In the early 1960s, Philadelphia Yearly Meeting of the Religious Society of Friends appointed a Committee on Aging to study the challenges presented by the increasing numbers of older people in society. The committee succeeded in securing several substantial bequests to address this concern, and subsequently made a grant of \$300,000 to the group seeking to explore the possibility of creating a retirement community in the Brandywine River Valley.

The name Kendal was chosen by its founders to recall an English town important in early Quaker history, and also to honor the seventeenth-century Kendal Fund, which provided philanthropic support to early Friends who traveled in the ministry.

In 1971, property in Chester County, Pennsylvania, was acquired to build Kendal at Longwood. It opened in 1973. Within a few years, Crosslands, Coniston and Cartmel were added to form Kendal Crosslands Communities (KCC). Working with a highly collaborative, team-based operating philosophy, the KCC encompass continuing care retirement communities, residential housing, skilled nursing and assisted living communities, in-home programs and services.

KCC's passion for ongoing life enrichment is equaled by its commitment to the understanding of, and education about, the aging process. We believe that many of the qualities embodied in our communities, programs, and services are attractive to others who hold similar values and goals. Therefore, we are pleased to share our philosophy and our experience to strengthen the not-for-profit field of aging services as a whole, and to contribute to continuing improvement in the quality of life and of care available to all older people.

KENDAL CROSSLANDS COMMUNITIES COMMITMENT

WE ARE CENTERED IN

the values that are described in this booklet, and in the spirit of community and collaboration that emanates from their practice.

WE ARE INSPIRED BY

the deeply held belief and confirming observations that the later stages of life can bring new opportunities for growth and development even if emerging challenges may bring some loss of independence.

WE CONTRIBUTE BY

working with older people, and others in the broader community, to create conditions that foster independence, well-being, security, and fulfillment in later years.

WE WILL STRIVE TO ENCOURAGE

all people in our society to approach the later years with an understanding of the aging process, with an appreciation of the potential for continued growth and development, and with realistic plans to address the variety of circumstances that may arise during the later period of life.

WE ENVISION THE FULL IMPACT OF OUR WORK AS

contributing to the transformation of our culture's view of aging, of older persons, and of the potential for fulfillment and continuing contribution during the later stages of life.

OUR VALUES

In carrying out our mission, our primary objective is to establish and maintain integrity and excellence in all aspects of our work.

TO ENHANCE THE QUALITY OF LIFE AND VITALITY OF THOSE WE SERVE AND TO FOSTER A SENSE OF COMMUNITY, treating each person as a valued individual and in an atmosphere of mutual respect and caring;

TO PROMOTE AN ENVIRONMENT OF CONTINUING LEARNING, encouraging lifelong growth for staff, community members, boards, and volunteers;

TO ENCOURAGE AND WELCOME ALL PEOPLE without regard to race, color, gender, sexual orientation, religion, national origin, or any other characteristic protected by law, to live in our communities and to serve on our staffs and boards;

TO PROVIDE HIGH QUALITY WELLNESS PROGRAMS AND HEALTH CARE SERVICES, treating each person with dignity;

TO PROVIDE PHYSICAL SETTINGS THAT ARE SENSITIVE TO THE AGING PROCESS and that enhance quality of life, security, and wellness;

TO ENGAGE IN PRACTICES THAT SUSTAIN AND IMPROVE OUR ENVIRONMENTS and our planet;

TO EMPLOY FINANCIAL DESIGNS THAT CONTRIBUTE TO SECURITY AND SERVE OUR SOCIAL OBJECTIVES to make our services and communities affordable, to the extent possible, to those with a range of economic capabilities.

TO FOSTER A HIGH QUALITY WORK EXPERIENCE FOR STAFF, recognizing that Kendal Crosslands Communities must be a good place to work if we are to offer good places to live and to provide high quality services;

TO STRIVE FOR EXCELLENCE IN MANAGEMENT AND GOVERNANCE, seeking and developing board and staff dedicated to our mission and values, and building partnerships with those we serve;

TO VALUE PARTICIPATION, TRANSPARENCY, AND CONSENSUS BUILDING by nurturing careful listening and effective decision making;

TO TAKE RESPONSIBILITY IN THE LARGER COMMUNITY, maintaining extensive and mutually supportive relationships and sharing our resources and experience;

TO CONTINUE TO GROW by engaging in ongoing evaluation and staff development, and by seeking and responding to new opportunities to further our mission;

TO TAKE AN ACTIVE ROLE IN AGING ISSUES through professional dialogue, research, public policy, and other means, thereby contributing to improved services for all older people;

TO FOSTER A CULTURE OF GENEROSITY, encouraging and developing full use of our time, talent, and resources;

TO MAINTAIN INTEGRITY AND HIGH ETHICAL STANDARDS in everything that we say and do.

A SENSE OF COMMUNITY

Enhancing the Quality of Life

In setting aspirations and goals for quality of life for those we serve, we consider the physical and social environments as well as the quality of professional services provided. In all aspects of our operations, we seek to honor each older person's human rights and needs:

- to be treated as an individual;
- to be treated with the presumption of competence, intelligence, and awareness;
- to have privacy and confidentiality preserved;
- to have challenges and limitations compensated for in ways that preserve dignity and self-respect;
- to share in decisions regarding health care and accommodations;
- to be protected from neglect, exclusion, deprivation, discrimination, and physical or psychological abuse.

Moreover, we work with a constant awareness of human needs that often become particularly important for those older persons who experience varying degrees of loss of independence:

- the need for freedom—including freedom of movement— independence, autonomy, and choice;
- the need for self-determination, particularly for involvement in decisions about one's care;
- the need to feel a sense of community and to feel connected with people of all ages;
- the need to have opportunities for learning, culture, fun, reflection, and self-expression;
- the need to be a valued and involved member of society.

We believe that, to be effective, our values and practices must be applied consistently. Therefore, we seek to enhance quality of life for those who are most active and carefully preserve quality of life for those who are most frail.

Fostering Independence and Community

We encourage all persons to plan thoughtfully as they enter their older adult years so that they may make the most of new opportunities and new relationships. We seek to preserve an atmosphere of mutual respect, caring, and trust for all. Our goal is to be inclusive, welcoming people who will both gain from and contribute to the Kendal Crosslands Communities experience, and to do so without regard to race, color, gender, sexual orientation, religion, national origin, or any other characteristic protected by law.

Mutual assistance and a sense of community grow naturally when community members take responsibility for conducting their individual and group activities. Independence and self-sufficiency are supported, in part, by *not* providing some services that community members, individually or cooperatively, are able to provide for themselves. For instance, we typically do not employ activities directors except in health center settings for those residents who need such assistance. Rather, associations made up of community members organize virtually all aspects of social, cultural, intellectual, and spiritual life.

Many community members continue to be involved in the wider world after joining a Kendal Crosslands community or program. Many remain active in political, cultural, volunteer, and religious activities. Some continue with full or part-time work as well.

Building Mutual Respect Among Community Members and Staff

In all matters involving staff and community members, we strive for open communication and seek to preserve a sense of community. Problems, concerns, and suggestions receive prompt and courteous attention and are viewed as opportunities to improve our services and to deepen mutual respect among staff and community members. We encourage bringing concerns to the attention of those most directly involved. We strive to be aware of which matters may be appropriately referred to staff or board, and which may benefit from collaborative effort. Suggested changes in practices or policies are evaluated in terms of the rights and needs of all.

CONTINUING LEARNING

Nurturing a Spirit of Inquiry and Continuing Learning

Community members and staff together nurture a culture of continuing learning through shared experiences, classes, and speakers and at neighboring institutions of higher learning. Libraries, interest groups, and cultural offerings are directed by community members.

WELCOMING DIVERSITY

Supporting a Spirit of Inclusion

Kendal Crosslands communities strive to create and support an environment for community members, board, staff, and volunteers that is welcoming to all cultures, backgrounds, and differences—an environment that promotes mutual respect, acceptance, cooperation, and teamwork. We believe that a spirit of inclusion and a culture of diversity enrich and strengthen our communities, people, and services.

WELLNESS PROGRAMS AND HEALTH CARE SERVICES

Wellness for Life

The concept of wellness is a vital part of the KCC ethos. We encourage wellness for all community members, all staff and their families, and our boards. Our goal is for each individual to live as full and fulfilling a life as possible. Our programs and fitness facilities are available to staff and families.

All wellness programs are directed first toward understanding the options available for achieving and maintaining the highest level of health and well-being. We then work to assist individuals so that they can reach their identified goals. We seek to be wellness-oriented throughout our communities.

High Quality Health Care Services and Wellness Programs

Some of Kendal Crosslands communities most distinctive characteristics are found in our approach to wellness programs and health care services. Many of our practices are pioneering among services for older adults and, we believe, are significant factors in providing a better way for older persons in our society. We strive to preserve and enhance each person's capabilities, to live emphasizing abilities rather than disabilities, and encouraging involvement.

Central to our philosophy of wellness and health care is thoughtful planning that optimizes ongoing wellness and fulfillment for each individual. Planning done in collaboration with the individual community member, and sometimes the family, is coordinated by health services staff, and is supported by an interdisciplinary team. To ensure consistency and continuity, the interdisciplinary approach integrates management and supportive services as well, with the knowledge that support service providers have a significant role in the health, safety, and well-being of the individual. We foster an atmosphere in which "taking care of others" comes to mean "supporting people in their independence."

Staff become familiar with community members and their normal lifestyles over a span of time, allowing the care team, in collaboration with each community member, to work out individualized goals and identify appropriate treatment and therapy regimens. Every effort is made to keep community members living independently. In light of our emphasis on independence and choice, decisions regarding the need for additional services or change in care setting are thoroughly discussed with the community member and made in full consideration of the individual's wishes, as well as the needs of the entire community.

Promoting Well-Being in Health Care Settings

To enhance the physical and emotional well-being of our community members, we seek to provide inviting residential environments in KCC community health centers. To the extent possible, each setting offers carpeting in rooms and common areas; absence of public address systems; inclusion of furniture or possessions of personal importance; choice of dining room, as able, regardless of disability, use of wheelchair, or other condition; the freedom to receive visitors at any time; access to people and places in the community as a whole.

When Loss of Independence Occurs

In all matters related to community members who have lost some degree of independence, staff are particularly careful to continue to preserve choice, independence, autonomy, and self-esteem. Since loss of independence may have already reduced control over many areas of life, those choices that remain are all the more important. We carefully preserve opportunities to make decisions consistent with abilities and encourage dressing, bathing, eating, and walking by oneself as much as possible.

Caring for the Very Frail

Caring for those who are very frail, cognitively or physically, is a particular concern. We are intensely aware of the need to respect the dignity and worth of these individuals regardless of their conditions. We care for these community members with an emphasis on each individual's strengths and not on diminishments alone. We do not use physical restraints because restraints increase the emotional problems of an already anxious individual. Sedatives, tranquilizers, and other pacifying drugs are used *only* to treat medical conditions and *not* as another form of restraint. When medication is used, it is frequently and precisely monitored.

Ensuring Dignity at the End of Life

Dignity and the right of self-determination for persons in the final stage of life receive our highest priority. In the KCC approach, death is treated as a normal part of the aging process. Community members are not hospitalized simply because they are dying. Depending on the circumstances, a terminally ill person may be cared for in the health center setting or in his or her own residence. Hospital care is chosen only if it improves the quality of the remaining life or is requested by the community member or family. There is mutual support in bereavement among community members and staff.

PHYSICAL SETTINGS

Designing to Enhance Quality of Life

KCC considers many pertinent facets of physical design when building residences and when serving those in their own homes. Each aspect of design is considered with a view toward supporting and enhancing the aging process and the provision of services. An environment that reduces barriers and facilitates access and safety may go a long way toward compensating for sensory and mobility challenges.

In our suburban community settings access to lifelong learning, to cultural events, to a wide array of services and amenities, to nature, to gardening, and to outdoor activities is highly valued. Interconnecting paths and nature trails encourage mobility throughout our community spaces. Physical design is planned to take advantage of the local setting and to be sensitive to the environment.

ENVIRONMENTAL STEWARDSHIP

Conservation, Sustainability, and Leadership

KCC embraces its deeply felt responsibility to use resources appropriately and conservatively so that we can “tread ever more lightly upon the earth.” When building our physical communities, and in the daily operation of them, we plan our activities with the goal of obtaining environmentally sustainable outcomes. To that end, all our new construction projects meet the highest green standards for minimal impact and environmental friendliness. To protect our natural areas, we recently sponsored an in depth study of the Bennett’s Run watershed in which our community is located. The results allowed us to implement a program to protect a portion of its mature forest from deer predation, thereby conserving this mature stand of hardwoods, and allowing its trees to regenerate.

FINANCIAL INTEGRITY

Providing a Sound Financial Foundation

Kendal Crosslands communities' objective is to establish and maintain a sound financial foundation that will enable us to achieve our goal of offering financial security and quality programs and services. We plan conservatively to minimize financial risk. Our financial security and strength allow us to pursue programs that affect not only our own community members but all older people.

Finances are designed to ensure both near-term health and viability and longer term growth. Fees are set to generate reasonable cash reserves for future obligations and needs. We aim to meet and exceed recognized accounting, actuarial, and other financial standards in order to enhance financial security and to operate efficiently. We are sensitive to the economic circumstances of those we serve, and to our responsibility to be wise stewards of financial resources.

Serving Our Social Objectives through Financial Design

KCC's financial approach also serves certain social objectives. These objectives arise from a commitment to egalitarian ideals, as well as from our not-for-profit status. An explicit obligation is "to make our services more effective, affordable, and efficient." A basic value permeating the entire atmosphere of KCC's work is our belief in the dignity, worth, and equal value of each individual regardless of age, condition, or economic status.

To the extent possible, we strive to serve people from a broad spectrum of economic means, to reduce economic distinctions, and to preserve an egalitarian spirit. KCC has reserve funds that may provide fee subsidies to residents in need. These funds have been contributed or set aside for this purpose, and current residents who become unable to pay the full monthly fees may apply to the assistance funds for help. KCC may also offer entry fee assistance on a limited basis, particularly to those who have lived a life of service.

Fee structures often incorporate modest premiums for larger units that enable modest discounts for the smaller units most often chosen by those with more limited resources.

STAFF RELATIONS

Maintaining a High Quality Work Experience

We are committed to the philosophy that KCC must be a good place to work if it is to be a good place to live and a good partner in service. We strive to earn and maintain a reputation as an employer of choice. Underlying these efforts is a desire to preserve a sense of community and to nurture an atmosphere in which all staff members understand how their contributions are important in fulfilling KCC's mission.

In all matters relating to staff members, we seek to deal with the whole person, not the job role alone, and to treat each person with dignity and respect. Confidentiality is maintained in personnel matters, and staff members have clear and effective avenues of appeal in the event of a disagreement about any matter related to their employment.

Kendal Crosslands Communities seek to provide staff members with a clear sense of direction, a thorough orientation to our philosophy, mission, and values, and the specific training needed to work with older adults. Each staff member is given clear job expectations and an understanding of how his or her particular work is important in fulfilling our overall goals. We maintain an open culture where direct and honest feedback about job performance is focused on assisting staff to attain high standards in their work. Staff listen to and learn from each other. Departments work cooperatively to solve problems, as staff and management together seek ways to improve the quality of our services.

In accordance with our basic values, we give full consideration to the needs of the individual staff member — through good wages and benefits, on-site child day care where possible, leave-time for vacations and illness, and a retirement savings plan. Promotion from within is encouraged and practiced widely. Grants for work-related education and on-site training programs give numerous opportunities for learning and advancement. Staff members are recognized for their accomplishments, for keeping the workplace safe, for outstanding attendance records, for developing better ways of doing things, and for devoting their working lives to the organization and those it serves.

An Effective Staff Education Program

Our goals in staff education and training arise from our values. We believe that education is an effective and powerful tool in developing our organizations and in strengthening the quality of our staff. We believe that diverse opportunities for growth help sustain high levels of enthusiasm and engagement in the workplace, create a more knowledgeable work force, and contribute to greater commitment and higher motivation. Aside from formal programs, education occurs in other ways—in departmental seminars, in the supervisory process, and in team sessions.

MANAGEMENT AND GOVERNANCE

Excellence in Management and Governance

KCC selects board members and management staff with a wide variety of backgrounds whose desire to serve arises from a religious or philosophical base and a deep ethical commitment to our mission and values. We operate in accordance with basic principles herein described and from a not-for-profit perspective. Board members serve as volunteers. Conflicts of interest are disclosed, including those inherent in community members serving on the boards.

To ensure informed and educated leadership by our boards, every effort is made to keep board members informed about developments in the field of aging. The board of directors is responsible for establishing its governing policies. Board members, together with staff and community members, collaborate on a variety of committees that make recommendations and provide expertise on specific issues.

Kendal Crosslands Communities aspires to high standards of integrity and objectivity in governance. In all matters arising among board, management, and community members, we strive for clear and open communication. Leadership teams accept the responsibility for providing accurate information about operations and finances, and for disclosing conflicts of interest.

Continuing Evaluation

As we search for better ways to serve older people, we continually gather data, analyze performance, and seek better ways to provide services and accomplish our mission. We strive to remain in the forefront in the field of care for the aging, and we regularly examine our current and long-range goals in order to adapt to changing conditions in the field and in society.

Taking Responsibility in the Larger Community

We encourage our community members, boards, and staff to be involved in the larger community as individuals. KCC strives to be a good neighbor, use responsible business practices, be good stewards of the environment, maintain ethical relationships, and build good relations within the local community. It is our practice to make fair and reasonable payments to local governments in order not to add significant burden to municipal services. We keep our immediate neighbors and local authorities informed of plans for development.

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.

AN ACTIVE ROLE IN THE FIELD OF AGING

Shaping Policies and Educating

A primary goal of KCC is to take an active role in issues affecting the aging in our society. We help shape public policies affecting older adults, and we support legislation and regulation for consumer protection in this field. We work to inform all older people and the wider society about the implications of the aging process so that better individual and collective decisions can be made in support of issues affecting older adults. In our public efforts, we strive to create positive and realistic views of aging.

The Not-for-Profit Perspective and Accreditation

To improve services for all older people, we seek to strengthen our field as a whole. We promote the not-for-profit perspective, believing that the primary concern of any provider of services for older adults should be the needs of the people served and not the profits that can be derived. We assist other not-for-profit organizations by sharing information and expertise, and we belong to local and state associations of not-for-profit services for the aging as well as the national organization, the American Association of Homes and Services for the Aging. Staff take leadership roles with professional organizations and make significant contributions nationally to our field.

We participate in accreditation processes and peer evaluation with national groups seeking to maintain standards of excellence in the field.

By sharing our values and practices, we hope our experience will benefit others so that, together, we can find better ways to serve the needs of all older people.

OUTREACH

Kendal Crosslands Communities ongoing pursuit of better ways to serve and to address the unmet needs of older adults has led naturally to the development of models and practices that we are pleased to share. We also welcome opportunities to collaborate with others in exploring new possibilities.

KCC is well-known for its pioneering work in practicing and promoting restraint-free care through its national *Untie the Elderly*[®] program.

Additional ways in which KCC's commitment to outreach has been expressed by community members, staff, and boards include:

- giving leadership to the development of model statutes, regulations, and an accreditation system and standards for continuing care retirement communities;
- collaborating in the creation and testing of computerized health and wellness assessment tools;
- formulating model practice protocols for clinical care;
- offering development programs for emerging leaders;
- partnering with others to develop and disseminate research-based systems of evaluating client outcomes in long-term care settings;
- collaborating in an increasingly wide array of creative, locally inspired initiatives.

We recognize that as issues concerning older adults are addressed differently in the future, KCC will need to continue to innovate to maximize quality of life for each person it serves for the longest possible period of time.

GROWTH AND DEVELOPMENT

Looking Forward

As KCC strives to move forward we will seek to attract a broad spectrum of future community members, take strategic planning seriously, and explore the leading edge of technological improvements.

In pursuit of our mission, we are committed to broadening our work, to serving more people and people of diverse backgrounds, and to meeting their needs in new and innovative ways.

While Kendal Crosslands Communities have learned a great deal over its five decades of service, each new conversation is begun openly and freshly as an opportunity to listen, research, innovate, and contribute.

THE ROLE OF GENEROSITY

Those involved in the beginning of the first Kendal community set a tone of generosity — of spirit, of time, of talent, and of resources. Indeed, the Kendal Crosslands Communities story began with a gift (*see page 1*).

The first Kendal board was mindful of those who would not be able to afford Kendal Crosslands Communities and of those who, through no fault of their own, might outlive their resources. A year before opening, donations already were being received to answer these potential needs. This spirit of generosity continues to characterize the life of KCC through gifts that have made possible financial assistance for residents, capital improvements in communities, internships for students, and accumulation of charitable reserves.

Scholarships for staff development, scholarships for child day care participants, funds for life-event emergencies, and staff appreciation gifts and bonuses are examples of an “over-and-above” commitment to staff at Kendal Crosslands Communities.

Our vision of KCC’s unusual generosity is expressed in efforts to make a difference in people’s lives in an outreach program delivering meals and housekeeping services to lower income area residents and in generous contributions to local institutions. In addition, thousands of volunteer hours are given each year by hundreds of KCC residents and staff, both within KCC and in the wider local community.

QUAKER ROOTS

Kendal Crosslands Communities are independent and are not part of, nor sponsored by, any religious or other social institution. It was founded, and continues to grow, with intentional regard for the principles of the Religious Society of Friends (Quakers).

Central to Quaker thought is an insight of the Society's founder, George Fox, who called upon Friends to recognize "that of God in every one." Friends also use the terms "Inner Light" or "Inward Teacher" to describe a common spirit found in each person. Those from other traditions find alternative ways to express respect for every individual. Oliver Rodgers, a Kendal resident, put it this way, "KCC is a place where you expect to meet the best in every person."

Early Friends' respect for the individual led them to engage actively in bettering society through the establishment of educational institutions and the pursuit of a variety of social causes. In this same spirit, Kendal Crosslands Communities reaches out to older adults, to enhance well-being, to promote understanding, and to meet emerging needs.

Some basic Quaker principles that guide our work:

The principle of equality rests on the concept of inclusiveness, and hence each person is to be equally valued and equally treated.

The principle of peace opposes violence in all its forms—physical, emotional, or verbal.

The principle of simplicity seeks clarity of purpose, dedication to living modestly, doing useful work, avoiding material excess, and making appropriate use of resources, whether human, material, or environmental.

The principle of integrity calls for honesty, personal wholeness, and living in harmony with the truth.

The principle of community recognizes that lives are enhanced by sharing with and caring for those around us.

For those who would like to know more about Quaker history and thought:

<http://www.pym.org/publish/fnp/>

<http://www.pendlehill.org/>

<http://www.fgcquaker.org/library/welcome/>

KENDAL CROSSLANDS
COMMUNITIES is a Quaker-initiated,
not-for-profit organizations.

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

In evaluating any person for
employment, training, compensation,
promotion, or termination, KCC
operates 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. We
operate in accordance with the
Americans with Disabilities Act.

