

What does today's Kendal at Longwood want to be?

By Ann Congleton

Living or working at Kendal at Longwood (KAL) is so valued by so many of its residents and staff that it is easy for us to forget that valued communities, like all other treasures, need to be thought about and cared for as well as enjoyed. Since my husband and I moved to KAL in 2018, we have found that there are even more reasons to be glad to be here than the sense of its "character of place" that led us to choose KAL in the first place.

Since moving to KAL, however, we have also come to share concerns about erosions of features of KAL's character of place, and this essay is an effort to try to understand these erosions and contribute to community discussion of what could help restore KAL's founding strengths.

Because looking at history can be a help trying to understand concerns, I began looking into KAL's history, and the following is a draft report of some what I have found so far. Although still only a draft, it seems perhaps useful to post it now as a follow up to this June's useful report from the KRA's Values in Practice Task Force. That report considers features desirable for any good CCRC, describing them as features of a "healthy community." This draft is meant to complement that by considering features that have made KAL distinctive and that led us to choose KAL rather than some other equally healthy CCRC.

The character of place that drew us to KAL was not just discussed by its founders. It was built into KAL's architecture and policies. In other words, it was structural, not just rhetorical. This draft tries to show how that character of place was achieved and what could strengthen it today.

The draft has three parts which can be outlined as follows:

Part One describes features that seem to me to form KAL's founding character of place, together with some history how these features were built into KAL's architecture and policies from KAL's opening in 1973 up through the 1980s, the period in which today's concerns seem to me to be rooted.

Part Two looks at changes in the United States as a whole and parallel changes at KAL that began in the 1980s and created a challenge to KAL's founding character of place. Part Two follows these challenges up to the COVID pandemic.

Part Three considers some post-COVID decisions at KAL whose problems are instructive for today's discussions of what relationship to its founding character of place KAL would like to have now and for the future.

One possible arrangement for such discussion could be for the KRA to follow up on its *Values and Practices Task Force* by creating a "next" task force for KAL, a task force on character of place, or arranging some other form of genuine community discussion.

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Part One: KAL's Character of Place

How then did KAL acquire its character of place? KAL was among the pioneers in the arrival in the U.S. from Europe of what was in the 1960s a new form of retirement living, the "Continuing Care Retirement Community" or CCRC. CCRCs proved valuable as the US continued its shift into the "nuclear" family, moving away from the traditional "extended family," which included the family's elders.

Already existing alternatives for elders included boarding houses and nursing homes. However, even the best boarding houses had no significant provisions for health care, while the nursing homes were not suitable residences for adults who were still active. The innovation of the CCRC movement was combining active living and health care.

A number of Quakers of Philadelphia Yearly Meeting (PYM), in particular its Committee on Aging, learned about CCRCs in California and brought the CCRC movement to the East Coast. That included opening KAL in 1973. But the particular constellation of features that gave KAL its particular character of place made it distinctive even among the other pioneering CCRCs of Pennsylvania.

A possible sketch of those features might be the following:

- 1) KAL was designed as a "village" of cottages surrounding a shared Center and connected to each other and to the Center by walkways, which are now also scooterways. The presence of motor vehicles in the interior of the campus was to be minimized, so parking lots for resident cars were kept on the perimeter as much as possible.

- 2) The whole village was to be characterized by what its Quaker founders valued as “simplicity,” which includes avoidance of excess and is a fundamental aspect of what distinguishes KAL from CCRCs whose ads compare them to “resorts” or emphasize “luxury.”
- 3) The village was to be shared by residents, staff and board/management who wished to be part of an actual community, as contrasted to being simply a lot of people living in one place. Genuine community was to involve collaboration in shaping of the community.
- 4) To enable KAL to be a genuine community, the number of residents was to be kept small enough – the founders thought about 350 maximum – to enable its residents, staff and board/management to be familiar with each other and thus better able to share discussion about directions and choices for the community.

As an additional support for community discussion, the founding board/management urged the first residents to form a residents’ association, saying that “the Administration will be counting on the Residents Association for advice.” The first residents held the same view and formed the Kendal Residents Association within a month after their arrival in 1973 with bylaws whose opening “Purpose” clause begins “to promote and further the interests and welfare of the residents of Kendal.”

The immediate success of KAL led to a flood of applications. The board/management decided to preserve face-to-face community size by not expanding KAL but instead creating a second face-to-face community, Crosslands, and it sought advice about Crosslands through a KRA questionnaire of all KAL residents.

When Crosslands opened, the board/management created a triad administrative structure to further protect the face-to-face community character of each of the two CCRCs. The triad consisted of an “Administrator” for each CCRC with the two Administrators coordinated by the Executive Director of the corporation as a whole.

- 5) The founders set the KAL village in the midst of abundant acres of woods and meadow and spaces for gardens. These grounds were and continue to be cultivated and conserved by KAL residents and staff working together. That collaboration continues today, including collaborative work to save the Big Woods and collaborative work by the Energy committees, which date back to KAL’s opening. In this period of increasing global awareness of the need to achieve sustainability, further related efforts are also emerging, such as a hydroponics pilot project which is already producing greens for the dining

rooms, and a project to strengthen vegetarian alternatives on the menu and reduce reliance on products of factory farming.

- 6) KAL was to be affordable by retirees from “lives of service.” These include retirees from fields such as nursing, teaching, the arts, and social work, fields that our society fails to remunerate in proportion to its reliance upon them. People who choose lives of service are also likely to be contributors to the vitality of their own neighborhoods, and that remains true when they come to KAL, so it has always been in KAL’s own interest to try to attract them.

Affordability by retirees from lives of service was therefore built into both Kal’s architecture and what it called its “Financial Design.” Architecturally, KAL was built with a range of cottage sizes and costs. Four sizes of cottage from “studio” to two bedroom were intermixed, and each side of the original village “squares” or “courtyards” included equal numbers of all four sizes as far as possible.

The “Financial Design” was described by saying that it would “employ a comprehensive fee structure which socializes costs in such a way that people of lesser means are able to join our community.” In at least some colleges which explicitly follow the practice of “socializing” tuition fees in order to include more scholarship students, the practice has been found to reduce economic resentment or defensiveness for everyone because the practice is known and thus it is recognized that the top fee payers are just as likely to be supporters of the social values of the institution as are the recipients of scholarships.

The policies supporting affordability also included avoiding extra “fees-for-service” in order to “avoid... economic distinctions among residents and preserve the egalitarian nature of our community.” Egalitarianism in communities is recognized as contributing to what is today sometimes referred to as a sense of “belonging” or “inclusion,” and making adherence to egalitarianism clear as a community practice can have the beneficial impact of encouraging self-selection among applicants for admission.

In addition to economic inclusion, further dimensions of inclusion have always been desired and are increasingly being proactively sought at KAL. One such increase has been the 2024 hiring of a Manager of what is today sometimes called “DEIB” (“Diversity, Equity, Inclusion and Belonging”).

- 7) KAL’s Center from the beginning has included its dining rooms and mailboxes drawing residents from their cottages into the community. The Center also includes KAL’s auditorium, library, arts studios, meeting rooms and other spaces for community activities, with all of the Center’s spaces meant to be as open as possible to all members

of the community, whatever their mobility or other health conditions. And from the beginning, all the activities of KAL's Independent Living (IL) residents have been planned and conducted by KAL's IL residents themselves without any need for the paid Activities Directors employed by other CCRCs.

- 8) KAL's Center also includes its Resident Care clinic for Independent Living residents and its personal care and skilled nursing wings for community members for whom their Independent Living cottage has become no longer manageable. As a fundamental aspect of the total design of KAL, these residential wings are part of the community Center itself so that their residents will continue to be participants and contributors in KAL's community life for as long as they are able, assisted by both KAL staff and residents still in Independent Living.

Despite KAL's Quaker founding, none of these features is exclusively Quaker, as Quakers are the first to point out, and Quakers have never been more than a third of KAL's residents even when it opened. Like many of KAL's other non-Quaker residents, however, I have come to appreciate how many of the features listed above that I especially value are included among what Quakers refer to as basic "testimonies." Together with KAL's commitments to affordability, two of the Quaker Testimonies that seem to me to have been especially important in helping KAL avoid becoming just another enclave of affluence among CCRCs are "community" and "simplicity."

The overall relationship of KAL to its Quaker founding seems similar to that described in a 2004 *Friends Journal* interview with the Executive Director of FSA [Friends Services Alliance, formerly Friends Services for the Aging], Warren Witte. He was asked about the "Quaker identity" of organizations founded by Quakers "... in a secular world that is marked by competition... and overwhelmingly non-Quaker staffs." Witte's reply included the following observations about non-Quaker residents and staff whom he has known to choose CCRCs founded by Quakers:

They value the participatory approach to decision making.... They are drawn to distinctive features including Friends' respect for differences, our emphasis on the bonds of community and the culture of participation and service, our concern for the spiritual as well as the physical care of those we serve, our emphasis on wellness and on... involvement in decisions that affect them, and Friends' reputation for running financially sound organizations.

The historical details of how the features listed above came to be realized at KAL are provided in KAL's essential historical booklet *An Act of Faith: The Kendal at Longwood Story*. It was written for KAL's fifteenth anniversary by Barbara Parsons, then a staff member and now a resident. It is available in hard copy in KAL's library or online in the KAL Digital Archive, which can be accessed through the KAL website, kalresweb.org.

Before moving on to Part Two to consider how these features came to be challenged beginning in the 1980s, it will be useful to note differences between studying the features that give a particular community its special character of place and collecting stories of the community's people, valuable though such collecting is and beneficial as it is for members of a community to exchange stories with one another. One difference is that the features that constitute the character of a place depend on some form of active continuing agreement among the place's inhabitants over the years, whereas particular stories can continue even if community agreement atrophies.

Another aspect of the difference is that the bonds created between the tellers and hearers of stories are different from the bonds of shared citizenship, which depend on civic action. Story sessions and collections of stories cannot sustain the character of place of a community if its inhabitants do not also give attention to actual decisions affecting the features of the character of place. In addition, residents and staff can continue to exchange stories without knowing what is being planned by decision makers, but they have no voice in decisions affecting character of place if those in a position to make decisions do not let the other members of the community know what is being considered in time for there to be genuine discussion before decisions.

In its legal structure Kendal has always been a corporation, and thus its board has always had the legal power to make decisions without consulting the rest of the community if it so desired. There has never been a proposal to change that legal structure of power, but corporations have very wide latitude in the "style" in which they choose to exercise their legal power. KAL's founding style of decision-making included open conversations and discussions among all its constituencies, both informally and formally, before decisions by its board/management that would affect KAL's character of place.

Keeping KAL small enough to be a face-to-face community and board/management presence at many community events were important to keeping such conversations and discussions possible. But the founding board/management further demonstrated its desire for a collaborative style of decision making by encouraging formation of a Kendal Residents Association as soon as KAL opened. The *Kendal Reporter* of May, 1973, shortly before the arrival of the first residents in October of 1973, said "the Administration will be counting on the Residents Association for advice," adding that

the readiness of future residents to take on responsibilities... [is] no surprise to anyone, of course—we have all been confident that we could expect it of the people who will be coming here. In fact, we are banking on it.... Our overall hope is that the assembled Kendalites [i.e. board/management, residents, and staff in collaboration] will, to use a Quaker phrase, proceed as way opens."¹

Members of the KAL board/management have recognized that their understanding of the community is limited by their being non-residents and mostly absent from campus activities, including those in the evenings or in areas such as the arts studios or Wellness Center or Health Center. An important example is that it was residents who recognized that the Big Woods was dying because of mismanagement of the wastewater spray system and lack of attention to an overpopulation of deer.

The founding board/management recognized that Independent Living residents not only had a better understanding of actual life at Kendal but also had the capacity and would have more time than the board/management to make arrangements for collaboration about topics related to KAL's character of place that were beyond the capacities of the board/management alone.

The residents showed that they shared the founders belief in the value of a residents' organization by establishing the Kendal Residents Association (KRA) within a month of KAL's opening.

A high percentage of the founding members of each of KAL's constituencies – its board/management, residents and staff – appear to have brought to KAL an ability and desire to function together in a “we” style, as contrasted to a top-down or “us-you” style. A “we” style, a genuine and effective “communitarianism” or “collaborationism” has been illustrated by Quaker Meetings for hundreds of years, and in the United States it was relatively highly valued in the broader population also during the 1960s and 1970s, the period in which KAL was founded.

This shared belief in collaboration, together with belief in the face-to-face community size making it possible, was soon illustrated during consideration of the creation of Crosslands. When KAL opened, its success was quickly evident, and the board/management, flooded with applicants, was soon seeking “guidance” from the KAL residents about building a second face-to-face community in order to avoid enlarging KAL. The KRA minutes of July 7, 1975, report that

The president [of the KRA] and the Kendal Executive Director have agreed that some type of Questionnaire should be given each resident for the evaluation of both Kendal's present facilities and for guidance in planning for the new facilities on the Savery [i.e. Crosslands] site, if and when the time comes. Absentee Residents will be contacted if there is a summer address.

Minutes of the following meeting report that 214 responses had been received, representing about three quarters of the total residents even though the survey was undertaken in mid-summer when many were away.

The triad structure

Soon after Crosslands was created in order to maintain face-to-face size as a basic feature of each CCRC, KAL's founding and formative Executive Director, Lloyd Lewis, created a triad arrangement to further protect face-to-face community. He appointed what he called an "Administrator" for each CCRC, reporting to him as "Executive Director" of the corporation as a whole. Because the Executive Director served as overall coordinator, the two Administrators were spared the time-consuming work of coordinating directly with each other, leaving each Administrator more free to serve as a unifying figure and agent for a single community.

Lewis's triad arrangement appears to have been the most successful organizational structure in the KCC's history once Crosslands was added. One of Lewis's Administrators for KAL, Joseph Lydon, spoke of it as

"a model of teamwork,... a broad interaction among residents, staff and board; where trust and understanding grow from open communication and listening."²

KAL at Fifteen

KAL's founding and flourishing were recorded at its fifteenth anniversary in 1988 in the booklet *An Act of Faith: The Kendal at Longwood Story*. No name appears on the title page, but it was written by Barbara Parsons, who was then a staff member and is now a KAL resident.

Barbara Parsons also wrote KAL's initial "prospectus" pamphlet, which was entitled *Values and Standards*. It was published in 1987, again without an author's name. This booklet was subsequently revised, reorganized, and incorporated in the contracts of residents under the title *Values and Practices*, with further editions through subsequent decades.

Values and Standards notes many specific features important to KAL's founding character of place, including the following:

"We employ a comprehensive fee structure which socializes costs in such a way that people of lesser means are able to join our communities." [13]

"Applicants are sought whose presence will make a positive contribution to the community and will foster an atmosphere of mutual respect, caring and trust. In talking with prospective residents, we use an 'admissions' rather than a 'sales' approach." [p. 6]

"We avoid applying extra charges for individual services or additional options whenever possible, providing the same level and quality of services to all residents. In this way we eliminate economic distinctions among residents and preserve the egalitarian nature of our community." [p. 13]

The two booklets by Barbara Parsons, *Values and Standards* and *An Act of Faith: The Kendal at Longwood Story*, stand as a record of the remarkable degree to which the character of place envisioned by KAL's "Founders" – the name KAL applied to all its first board/management, residents and staff – was successfully realized through their collaboration in KAL's first fifteen years.

Part Two: Contrary Winds

Beginning in the 1980s, however, the winds shifted for both the United States as a whole and for KAL. The shift at the national level was out of the relatively "egalitarian" era of the 1960s-1970s in which KAL was founded and into a period which is referred to by both its critics and its admirers as "The Reagan Era." The new times included a resurgence of influence in the U.S. of for-profit corporations typically operating with a more top-down style of decision-making and with a focus on competition and "the market" rather than on support of egalitarian social policies.

The shift of winds made the times much more challenging for collaborationist non-profits such as KAL throughout the United States. They would now need to "sail upwind" if they were to stay on their founding course, and sailors know that sailing upwind requires more skill and imagination than simply being blown along by whatever wind is prevailing. Kendal's experience in the new times turned out to include both downwind and upwind. Seeing how this unfolded helps show why discussion of character of place is needed at KAL in 2024, something the KRA could provide through a Character of Place task force or some other arrangements.

Blown off course

At the national level, the non-profit corporation responsible for KAL, which was then called simply "Kendal-Crosslands" corporation, was first blown downwind in the 1980s by the emergence in the U.S. of a new phenomenon, namely commercial CCRCs hoping to profit from the pioneering work of the non-profit CCRCs. The new for-profit CCRCs were mostly upscale, already advertising "luxury" and marketing such things as larger residences with cars adjacent, "fine dining," "entertainment," and more "services" for residents. In their decision-making, these for-profit CCRC corporations relied on the more top-down corporate style and on what was often referred to as "managerial talent" rather than on the shared reflection and collaboration among board/management, residents and staff basic to KAL's nature and flourishing in its first decades.

Lloyd Lewis noted this development in the 1988-89 Annual Report of Kendal-Crosslands, writing that "corporate America has identified aging America as a major market to be

exploited.” In the same Report, long-time Board Chairman Alan Hunt noted it also and described the board/management’s proposed response, writing that

The... Board believes it sees a future in which continuing care, which throughout its relatively short history has been the preserve of non-profit groups, will come to be dominated by major business corporations....[We] need... to grow in response to the prospect of powerful competition in the life care market..... [T]o ignore the kind of housing being offered older Americans today, for which many appear eager and able to pay, would be to risk our future.”

Under the influence of the new winds of commercial competition, the Kendal-Crosslands board/management, operating in the top-down manner without the discussion with residents included in the planning of Crosslands, decided that it should move in the direction of “the kind of housing... for which many appear eager and able to pay.” As a result, Coniston was opened in 1981 and Cartmel in 1989.

The new “50+” complexes were said to be intended as “feeders” for the CCRCs, but designing the new housing to compete in the for-profit “downwind” market involved fundamental departures from KAL’s founding character of place, departures that the CCRC residents might well have opposed had they been consulted and that turned out to be portentous.

The departures included setting aside the simplicity and community orientation and economic diversity of KAL’s “cottages.” Instead, Coniston and Cartmel were designed as large duplexes with attached garages and expanses of pavement for driveways and roads instead of walkways. Not only were there no covered walkways, but, like many suburbs of the time, there were not even sidewalks, just roads and driveways. And there were no units that could be priced to attract people retiring from “lives of service,” and no community Centers.

There does not appear to be any indication that the board/management were concerned about the possibility that the very different design of Coniston and Cartmel could attract residents different from those attracted to KAL by a desire for features such as simplicity and collaborative community and economic inclusiveness. Thus while the sales process for the new duplexes included an admissions process, the process does not appear to have been thorough as what was involved in KAL’s reliance on “an ‘admissions’ rather than a ‘sales’ approach... [because] applicants are sought whose presence will make a positive contribution to the community....”³ The “admissions” approach was meant as a way to try to assure that applicants to KAL understood and valued its intended character of place.

The board appears to have assumed that these aspects of KAL could be omitted because the “50+” developments would make no significant difference to the CCRCs except as sources of future residents and would not be a significant addition to the workload of the

board/management. However, the actual experience has been that the “50+” developments do require managerial attention, and their residents have not chosen to move to KAL or Crosslands at the rate that seems to have been anticipated, preferring alternatives including what is today called “aging in place.” One view is that the low rate of moves to the CCRC is due to there being too large a difference in the characters of place. Nor do the “50+” developments appear to be a source of income for the corporation since they have been described by the board/management as roughly “breaking even.”⁴

In 2024, an analogous challenge to KAL’s founding character of place is being presented by the large apartments being inserted into the new wing of KAL’s Center. A restoration of the ‘admissions’ approach,” which was meant as a way to try to assure that applicants to KAL understood and valued its intended character of place, could help shape the impact of this most recent skewing of KAL’s housing toward the high end of its price range. The new apartments will also bring an increase in the total number of residents, moving further from the face-to-face size that was an essential feature of KAL’s founding character of place.

It has been suggested that an “admissions” approach would be unworkable today because of increased state and federal regulation. Increased regulation has indeed added to the costs and complexity of operation of all organizations, including those whose contributions to society are senior housing. In actuality, however, there do not appear to be any specific laws, regulations or codes preventing KAL from following today, along with many schools, sports teams, and even some volunteer groups, the sort of admissions approach followed when KAL was created, including participation by members of the board among the interviewers.

In addition to the board’s decision to build Coniston and Cartmel, the resurgent influence of the more top-down style of management in the U.S. in the 1980s was reflected in movement of the Kendal-Crosslands board/management itself toward a more top-down style and away from community discussion in decision making, as indicated in the omission of discussion with residents in the decision to build the “50+” developments. Ten years earlier, the Annual Report of 1978-79 still reflected the emphasis on community which had led the founding board/management to express hope that that residents would immediately create a residents association since the board/management would be “counting on the Residents Association for advice.”

Ten years later by contrast, the 1988-89 Annual Report contains no similar language and seems instead to reflect the rising of the more “corporate” top-down style when it describes itself as follows:

“The board of any organization like Kendal has an absolute duty, legal and moral, to take the long view.... Imperfect though our ability to see clearly into the future may be, our obligation to try to do so, and to act upon what we believe we see, is inescapable.

The “we” here appears to refer to only the board.

Kendal has always been a “corporation” in the legal sense, even though the legal names and composition have varied over time. There does not seem to be any record of anyone ever proposing changing KAL’s legal status, nor is it proposed now. The board/management governing KAL has therefore always had the legal power to act in what is sometimes called “a top-down” style without discussion with other constituencies of the community if the board/management wishes.

But corporate board/managements, whether for-profit or not-for-profit, have very wide latitude in choosing the “style” in which they exercise their legal power. That a collaborative style is entirely possible is shown by Kendal’s own early history.

In addition, efforts “to see clearly into the future” in hopes of finding a direction are different from the practices of sailors who have a destination in mind and adapt to the winds of the present as needed to hold their course in that direction.

Sailing upwind: Creation of The Kendal Corporation

The board did not move only downwind as the national winds shifted in the 1980s. The board had also a destination to try to steer by even as it was blown downwind into building Coniston and Cartmel. That destination had been sketched as follows in the opening section of *Values and Standards* entitled “Commitment to a Better Way:”

The values and practices embodied in our communities are derived from a particular mission – ‘to provide, at reasonable cost, those conditions fostering independence, health and security under which residents may realize their fullest potential.’We are pleased to share our philosophy and our experience in an effort to strengthen the not-for-profit long term care industry as a whole, and to contribute to an overall improvement in the quality of care available to older people in our society. [pp. 1-2]

The last sentence of the last page of *Values and Standards* reaffirms the “mission” stated in the opening section:

In sharing the values and standards of Kendal-Crosslands, we hope that our experience will benefit others so that, together, we can find better ways to serve the needs of older people in our society.” [p. 18]

And so the board/management, at the same time that it was blown downwind into building Coniston and Cartmel, also set an upwind course. Remembering that “the values and practices embodied in our communities are derived from a particular mission,” and evidently also

remembering that there can be strength in numbers, the board/management founded a national coalition of non-profit CCRCs, The Kendal Corporation, which continues to serve that mission today.

The success of KAL, including its Untie the Elderly program, had led to numerous and multiplying requests for assistance in creating programs elsewhere, with the result that the board/management had already in 1985 created a consulting division called “Kendal Management Services.”

KAL’s founders had in fact long thought of their work in a national context. When the Kendal-Crosslands corporation began issuing Annual Reports in 1978-79, the first paragraph of the first Report said that

As the number and proportion of persons 65 and older in the U.S. population increases.... [these increases] have produced new types of living patterns for older Americans. Kendal and Crosslands are part of this new direction.

The 1986-87 Annual Report reported that the board had reviewed “the Kendal-Crosslands mission statement,” and the resulting statement’s seven “key elements” begin with “being a leader among continuing care communities in the United States” and concludes with “working with others to fill important needs of the aging.” It is worth noting that this list of seven “key elements” also includes “admitting and maintaining in our communities, as resources permit, people who are unable to pay full fees.” [p. 5]

Thinking on a larger scale had always been true of KAL’s founding sponsor, the Committee on Aging of Philadelphia Yearly Meeting (PYM), headed at the time by Alan Hunt. PYM’s work on behalf of the elderly stretches back to its founding of Philadelphia’s first almshouse in 1713 and includes joining with African Americans in 1864 to found Philadelphia’s Home for Aged and Infirm Colored Persons. In the 1960s PYM had already supported the founding of KAL’s two immediate predecessor CCRCs, Foulkeways and Medford Leas, before it gave the \$300,000 grant that made KAL possible.

Both PYM and the creators of KAL believed strongly in a non-profit approach. After noting disadvantages faced by the Kendal-Crosslands corporation in the competition from the new for-profit CCRCs, Kendal’s *Annual Report* of 1988-89 went on to say that Kendal-Crosslands also had

advantages which are not likely to be taken away from us. Chief of these is our conviction, shared by a great many of the nation’s elderly, that care of the aging is best done by non-profit groups which do it because they believe in it, and not by business organizations which do it to make a profit.”

Remembering that there can be strength in numbers and setting its course upwind, the “Kendal-Crosslands” board reorganized itself in 1989 as a multi-state company, changing its name to “The Kendal Corporation” and eventually renovating what is now called the Worth House on the KAL campus to be its headquarters. The list of members of the board of the new “Kendal Corporation” was essentially the same as the list of the board of the previous “Kendal-Crosslands” corporation with a small expansion of three or four added members.⁵

At the multi-state level, The Kendal Corporation (KCorp) was from its start and continues to be a notable example of an organization helping non-profits “sail upwind” in a society whose winds continue to favor large for-profit corporations. For over 35 years KCorp has assisted the development of non-profit CCRCs sharing major features of KAL’s founding character of place such as face-to-face size, “simplicity,” inclusiveness through egalitarian fee structures, and, perhaps most significantly, relatively collaborative approaches to decision-making. The first CCRC whose formation was assisted by The Kendal Corporation was Kendal at Hanover, opened in 1991, and the most recently added affiliate, Enso Village in California, was opened in 2023.

How could it happen that a single board/management wound up sailing both upwind to create The Kendal Corporation and downwind under the influence of the commercial CCRC market to build Coniston and Cartmel? An explanation appears to lie in a decision made by the “Kendal-Crosslands” board at the time it renamed itself “The Kendal Corporation.” While remaining a single board legally, it divided itself internally into a “board” which took the name “The Kendal Corporation” to handle development of the new national activities, while a second “board” labelled the “Kendal-Crosslands Communities” board carried on the work of the original corporation supervising the existing communities. Members of the total board distributed themselves between the sub-board taking The Kendal Corporation name and the sub-board taking the new “Kendal-Crosslands Communities” name. Initially there was only one overlapping member, albeit a very notable one, Sally Worth, regarded by many as the initiator of the whole Kendal project.⁶

Blown downwind

Placement of KAL with the “Community” board when KCorp was launched was not meant in any way to be a form of marginalization. In fact, it was explicitly recognized that what had been so successfully launched in the 1970s, especially its collaborative approach to decisions, could not be taken for granted in the more “top-down” corporate era beginning in the 1980s. That recognition is reflected in an important “if” and the phrase “interdependent” in an address by Lloyd Lewis celebrating the fifteenth anniversary of KAL in 1988:

“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 at Longwood will remain one of the foremost continuing care communities in the United States.”⁷

Recovering that sense of community through open communication and collaboration among all constituencies is a major aspiration at KAL today. In 2023 Kendal historian Harry Hammond, in the lecture he was asked to give to launch KAL’s 50th anniversary celebrations, quoted Lewis’s account of the basis of “community-building” at KAL and said

“Note that Lewis used the phrase ‘interdependence of all participants’ The choice of words seems important. Also note his use of the conditional, ‘IF.’”⁸

Alan Hunt, who was Clerk of the PYM Committee on Aging when it gave the “start-up” grant for the founding of KAL and who was Chair of “The Kendal Corporation” board for many years in the 1980s and 90s, certainly understood Lloyd Lewis’s “if” in 1988. But Hunt decided that the “Community board” could provide for KAL in a way that could “keep this same dynamic alive.” In the 1988-89 Annual Report announcing the board’s reorganization, Hunt expressed this conclusion as follows:

“Earlier [in this Report] I wrote of the need for us to grow in response to the prospect of powerful competition in the lifecare market from major business corporations. An equally important response must be the one we make within the communities where we began: Kendal at Longwood and Crosslands...” [whose “intangibles of spirit” and other aspects of KAL’s character of place Hunt also celebrated in the 88-89 Annual Report].

The division into the two boards put the national board in a position to articulate the upwind vision represented by KAL without the complications presented by the downwind nature of Coniston and Cartmel with their orientation toward competition with the for-profit market and their lack of such features as community centers and provisions for units affordable by retirees from lives of service.

For KAL itself, however, being combined with Coniston and Cartmel under a single board may well be what eventually opened the door to the erosions of KAL’s founding character of place. As will be seen, the actions of the community board, which became the KCC, came to reflect the market/business orientation represented by Coniston and Cartmel more than the features of the founding character of place of KAL, especially once the primary energies and insights of founding figures including Alan Hunt and Lloyd Lewis became focused primarily on the new national organization.

Initially KAL seems not to have been significantly affected by the board restructuring, perhaps simply because KAL had been launched so successfully that sheer inertia could carry it for a while. Also the Community board was still tied to the total board, which had shown itself mindful of the risk involved in separating the Community board from the national board. But in

1995, six years after the creation of The Kendal Corporation, the Community board was spun off as a separate legal corporation of its own, becoming the KCC and simply one among the by then several affiliates of The Kendal Corporation.

A major difference between the KCC and the other affiliates such as Hanover and Oberlin, however, was that all the other affiliates had and have continued to have a one board/one CCRC alignment. The “4-campus” KCC board, by contrast, had one board supervising four campuses and the four included contrasting upwind and downwind elements. The KCC also came to have less resident input in decision making than the other affiliates, a difference eventually documented in a study made by the KRA “Working Group” to be described below, and a difference that would make it easier for the market/commerce/top-down elements of the KCC to become dominant.

Whatever the reason, KCC board/management development toward the re-ascendency of top-down corporate market-oriented style in the U.S. seems reflected in a pattern of KCC board/management decisions made without community discussion and contrary to KAL’s founding character of place. These decisions included extension of the Coniston/Cartmel architecture of large cottages with cars adjacent into KAL itself as the “new cottages” opened at KAL in 2012, elimination of nearly half of KAL’s units designed to be affordable by retirees from lives of service, increases in the total number of KAL residents contrary to the founding commitment to face-to-face community, and eventually elimination of the triad administrative structure created to protect community at KAL and Crosslands and replacement of it by a single CEO for all the campuses, assisted by a staff whose appointments were also 4-campus. Quite a lot of the original language used about KAL was retained, but it began to become hollow.

The single CEO/4-campus staff arrangement was considered “more efficient” from a board/management perspective. The board/management began to use the phrase “4-campus, one community” as an expression of this move toward unification until residents objected that the phrase involved fundamental re-definition of the word “community” and that if KAL’s character of place was to be sustained, the phrase and associated corporate practices would need to be reversed to “one campus, 4 communities.” KCC corporate use of the “one community” phrase stopped, but the same approach seemed reflected in such things as the replacement of the individual entrance signs of the four campuses by signs of a uniform design explained as being preferable for “brand consistency” and the emergence of board/management dominated “4-campus committees” which differed from cross-campus resident-staff collaborations illustrated today by the Big Woods committee.⁹

It seems clear that none of the board/management decisions contrary to KAL’s founding character of place would have been supported by residents if they had been part of

community discussions prior to the decisions. Alan Hunt wrote in the 1994-45 Annual Report that “resident participation gives us wise guidance and can save us from ghastly errors.” [p. 4] In relation to the question of sustaining KAL’s founding character of place, perhaps the major candidate for “ghastly error” has been KCC board/management movement away from truly open and collaborative “resident participation.”

Instead the KCC has reflected the national increase in reliance upon outside “consultants.”¹⁰ A reflection of this at KAL was that there was no community discussion before the KCC board/management’s decision to eliminate so many of KAL’s affordable units, but there was support from a consulting firm retained by the KCC for many years. The firm encouraged the KCC’s shift toward large units with cars adjacent and also suggested that “juggling” might be a “creative” way of “managing this process from a resident life perspective:”

“...any plan to replace inventory creates significant upheaval at a campus. Managing this process from a resident life perspective will be a major task in and of itself. It will require careful thought as well as creativity (perhaps juggling also is an appropriate term) as to how to implement the strategy while minimizing disruption and mitigating potential resident dissatisfaction.”¹¹

As the KCC corporate planning and decision process moved further away from practices of community discussion before decisions affecting character of place, the Kendal Residents Association seems either not to have noticed or for some reason to have accepted the shift. Perhaps the KRA was lulled by the achievements of KAL’s founding years or perhaps the inertia typical of institutional life simply slowed recognition of major changes and response to them. Whatever the reason for its silence, the KRA, despite being founded “to promote and further the interests and welfare of the residents,” did not organize resistance to the erosions of features of KAL’s character of place in these years.

KRA meetings did not include discussions of topics such as whether it was important for KAL to keep itself affordable for retirees from lives of service or whether residents on the KCC board should be fewer and more constrained than those at other affiliates or whether KAL’s founding egalitarianism was being weakened by board/management increases in the number of residents and unilateral establishment of extra services for those who could pay a fee.

If today’s board/management and today’s residents were to become interested in restoring KAL’s founding practices of genuine all-constituency discussion, a KRA task force on character of place or some comparable forum could propose ways to help in that restoration.

A crisis at KAL beginning in 2013 did eventually lead the KRA of that period to speak about the need to try to restore KAL’s founding practices of community discussion.

The crisis leading to the KCC's Task Force on Structure

The specific incident in 2013 that led to the crisis a couple of years later was the resignation of the "Administrator" of KAL – by then called "Executive Director" -- to accept leadership of a CCRC closer to his family. In response to this resignation and apparently in the context of already existing KCC considerations of possible structural revisions, the national Kendal Corporation's Director for Affiliate Services, Judy Braun, came to Kendal-Crosslands and made a study. She found that both the residents and the staff of each of the two CCRCs considered it very important that there be an individual administrator/director for each CCRC. Braun's own phrase was "point person". She wrote in her report that

Kendal and Crosslands residents were consistent in wanting a single, high level point person in each of their communities.... [Staff also] consistently remarked that it would be essential to have one point person for residents at each campus and the campuses be able to retain individual personalities.¹²

Braun was aware that there had ceased to be a steady arrangement for coordinating the point persons once KCC Executive Director Lloyd Lewis turned increasingly to the launching of the national Kendal system. By 2013 the work of coordinating had fallen entirely on the point persons themselves and had even spilled over to involving board members, who found it burdensome. Braun recommended that the KCC board return to some version of its successful triad arrangement.

In the light of the Braun report, the KCC board acknowledged that a stand-alone CEO would be inadequate, but the board nonetheless chose not to restore the triad structure. Instead it announced a stand-alone CEO as follows:

"Recognizing that one leader alone cannot manage all aspects of the organization, the CEO will be responsible for creating how the organizational structure will provide residents with accessibility to high level staff."¹³

The announcement indicates that the board did not understand that residents of the CCRC's were not seeking simply opportunities for hierarchical conversations, opportunities to address "high level staff." They were seeking restoration at each CCRC of the actual community which had been created by the founders of KAL and Crosslands and supported by the triad structure once Crosslands was opened.

The CEO chosen by the board in 2013, however, did not recreate the triad by appointing replacements for the point persons and accepting the role of coordinator. He chose instead to try to do what the board agreed "one leader alone cannot" do, namely "manage all aspects of the organization" himself, including all four campuses. He did create the office of COO, but made it a 4-campus position also. The CCO was very highly regarded at KAL but soon resigned

to accept a position elsewhere, a resignation many residents believed to be due to a recognition that the CEO's four-campus approach was unworkable.

There seems to be strong resident and staff support continuing today for the Braun Report's finding that residents and staff of both KAL and Crosslands considered restoration of the triad structure the best path restored flourishing of community.

The "Report of the Values in Practice Task Force" comments that people who advocate reexamination of a past decision may simply be expressing a "grievance." But decisions by human organizations have often needed reexamination throughout human history, and reexamination of the triad structure, or community-based development of an alternative, seems needed.

Advocating restoration of the triad structure is also not advocating that the campuses be isolated. There can of course be important collaborations among the KCC campuses, as currently illustrated by the collaborations of the Energy committees of the different communities and the rescuing of the Big Woods. Similarly, members of the KAL community have collaborated with Kennett Square groups or other off-campus groups since the time KAL opened. An example is KAL's decades-long participation in Kennett Square's "Meals on Wheels" program, which began only three years after KAL opened and continues to be successful, now under the direction of Steve Wandishin, one of KAL's cherished long-time staff members, assisted by KAL residents.

The problems of the 4-campus structures arise when a management-dominated 4-campus committee weakens the coherence of the individual campuses. Examples include the problems when KAL's representatives on the 4-campus "Marketing" committee have difficulty getting board/management assurance of the visibility of KAL on the KCC 4-campus website, or when analogous difficulties are encountered by KAL representatives on the 4-campus "Finance" committee.

The most serious problem created by the board's imposition of the current 4-campus structure, which makes all Senior Staff appointments into four campus appointments as contrasted to the triad structure, would seem to be the problem of trust. Not only has the KCC board/management been drawn toward a more top-down corporate "style," making decisions affecting KAL's character of place without community consideration in advance, but because of the exclusively 4-campus senior staff, no member of the board/management can speak adequately to the individual concerns of KAL or any of the other three. An example is a meeting of the KRA board at which the KRA President said that although the CEO was present, she would not speak to the important issue under discussion since she would "need to represent all of the KCC communities" and her "point of view has to be broader than that of Kendal [at Longwood]." ¹⁴

This danger of the 4-campus structure, which began to generate this sort of concern as soon as it was created, is the very problem that the triad structure was created to address, and when one of the point persons resigned in 2013 and the KCC board decided to move to a single CEO rather than restore the triad, concerns about communication increased further. As a result, the KRA in 2017 voted to create a committee which

“would be charged with... creating proposals to help the KRA work on the issue of KCC Board/ KRA communication in order to create more trust and participation in our decision-making process.”¹⁵

The Report of that KRA committee created in 2017 touches on many issues that a KRA Task Force on Character of Place or some other form of focused and sustained community discussion could work on again now. These issues include the question of the 4-campus situation following board/management dropping of the triad structure. The 2017 KRA minutes creating what came to be called “the Working Group” described the KAL “Working Group” as needed because of “a feeling that a... [KAL] committee needed to work specifically with... [KAL] concerns and... [KAL] residents and develop its own identity.”

In addition, the problem of board/management withdrawal from transparency was also reflected in those minutes, including the following passage that notes

a clear yearning for a Board/resident relationship where information flowed freely between Board and residents and where Board and residents shared their experience of the community.... [The KCC CEO] reminded us that we are not a co-op, but KRA Board members remembered earlier days when KCC Board members and residents had worked closely together.... KCC Board members are thoughtful and conscientious and bring much needed skills and experience to their oversight of our community, but we don't know them and they don't know us. We treasure the fact that our community is guided by Quaker values, but we are lacking the transparency and mutual understanding which Quakers seek to cultivate.¹⁶

The KRA Working Group's report, entitled “Enhancing Communication with Community,” appeared in July, 2018.¹⁷ Its closing section, “Recommendations,” begins by affirming that “The strength of Kendal is the strength of its community.” The whole report would be valuable for a KRA Character of Place task force or other community forum to review.

The Report appears to have been discussed briefly by the KCC board/management in 2018, but the only response to the Working Group appears to have been a letter which did not address the content of the Report or seek discussion or collaboration.¹⁸ The letter simply informed the Working Group that the KCC board had instead created its own 4-Campus committee “to consider matters of communication.” The letter said that the KCC board “would look forward to sharing the results ... when it is concluded,” but that 4-Campus committee, after holding a number of meetings, was then unilaterally terminated by the KCC without any report.

Before the Working Group or KRA could make further efforts for discussion with the KCC board/management, the predicted inability of a stand-alone CEO “to manage all aspects of the organization” was illustrated when a serious staff crisis in the KAL Health Services roiled the community. A joint resident/staff Task Force on Health Care was formed in response, co-chaired by the Director of Health Services and a resident who was a past President of the KRA. Although resident-staff collaboration was an important part of the early years of KAL, the 2018 Task Force on Health Care may have been the first recent Kendal group to have resident and staff co-chairs working together as equals on a community issue, including developing policy recommendations for board decision.

The Task Force on Health Care was a notable success, showing again how resident and staff collaboration can lead the community through a major issue, including formulating policy recommendations.¹⁹ More than a dozen “listening sessions” were held to provide opportunities for residents to express their views; careful summaries of each speaker were prepared and consolidated into a document for the Task Force members. The Task Force also held multiple sessions with key participants in the conflict and with leaders in Health Services. As a means of keeping the entire community informed, thirteen weekly reports were distributed to all residents and staff during the duration of the Task Force’s work. The “Final Report of the Task Force on Health Care” was presented to the community in April of 2019, and is on file in the KAL Library.

Before the final report of the Task Force on Health Care was presented, the CEO resigned from the KCC and eventually became successful as the head of a CCRC elsewhere about the size of KAL alone and not part of a multi-community conglomerate.

An important outcome of the work of the Task Force on Health Care was the creation of an ongoing resident-staff KAL Health Services Collaborative Committee led by resident and staff co-chairs. This KAL Collaborative Committee is fundamentally different from the current KCC “4-Campus” committees in that it is a KAL committee and a true collaboration between KAL staff and residents, not a KCC project to amalgamate multiple campuses. It continues to be valued by both KAL residents and the KAL Health Center staff.

In the wake of the resignation of the “stand alone” CEO, the KCC board brought in a consultant from the consulting firm ARI. As preparation for writing her report, she conducted multiple focus groups. Residents who participated recall that restoration of some version of the triad structure was repeatedly advocated. They believed the consultant, who was well regarded by the focus group participants, understood this. Residents were therefore concerned when the board/management in June, 2019, released what it called an “Executive Summary” of her study that did not match the recollections of participants in the focus groups.

Whatever the preparation of the ARI “Summary” may have been, and despite the earlier Braun Report’s support of the triad model (which residents believed Pugh also supported), the KCC board in 2019 decided to appoint another “stand alone” CEO, and no provision was announced

for any version of the triad arrangement. Instead it soon became clear that the additional senior staff appointments were to be “4-campus” appointments also.

The result has been that since 2013, and despite the explicit calls from residents and staff recorded in the Braun Report, there has been no member of the senior staff whose portfolio focuses on seeking the overall well-being of KAL as a community with the character of place for which it was founded.

However, even though the KCC board decided to appoint another “stand alone” CEO and an entirely 4-campus Senior Staff, the board did also give an indication that it had some recognition of resident and staff concerns by deciding at the same time upon a forward looking plan for “a continued evaluation of the organizational structure.” The same memo from the KCC board’s “Transition Committee” that announced the board’s decision to appoint another “stand alone” CEO also announced the board’s additional decision to create a “task force” on structure.

The KCC’s Task Force on Structure

The Transition Committee’s announcement, sent to the community just before the COVID outbreak, reads as follows:

“We... recognize that the survey responses and focus group discussions yielded valuable information that will be embraced as we move forward.

The Committee also acknowledges that, in hindsight, the transition to a single CEO... could have been handled differently. Accordingly, **the Board has approved the creation of a task force after the new CEO is hired.** The task force will include representatives of the Board, residents, and senior staff, including the new CEO. The task force will evaluate the information we have gathered through surveys, community meetings, residents associations and other forms of community engagement.

The task force will recommend to the board a structure which is responsive to resident and staff concerns.”²⁰

The new CEO, Lisa Marsilio, was appointed in 2019, but the Covid-19 pandemic intervened before the KCC task force could be organized. However it could be established now. The new CEO is in place, and Kendal has emerged from its years of pandemic shutdown.

The fact that KAL came through the pandemic with remarkably few losses was due to the outstanding response by the staff members of KAL’s Health Services and its Culinary and other departments, supported by the active cooperation, including mutual support, of the residents, and all of it led by Lisa and the KCC’s Chief Health Services Officer, Donna Taylor, with great success. The residents are permanently grateful and are also glad that the video that records

the historic achievement of the KAL management and staff will be permanently available in the Kendal Digital Archives.

Part Three: After COVID

Having come impressively through the years of COVID shutdown, KAL got to work shaking off damaging effects of the pandemic by doing things such as helping those who had moved in during those years learn about and feel welcomed in their new home.

Another shutdown effect that still remains to be shaken off is an intensification of board/management reliance on the top-down style of decision making that began in the 1980s both for the United States as a whole and for the KCC. A top-down style made sense for getting through the pandemic, and it would not be surprising if ordinary inertia brought some continuation after the pandemic itself ended. But if there is to be a renewal of KAL's founding character of place and flourishing, there will need to be a renewal of its founding practices of all-constituency discussion before board decisions affecting KAL's character of place.

Renewal might be encouraged by actively remembering that KAL's founders hoped that KAL would operate in a "we" style as contrasted to a top-down "us-you" or "us-you folks" style. That is the hope that led them to encourage the first residents to immediately create a residents' association whose purpose would be "to promote and further the interests and welfare of the residents of Kendal" and "to communicate and cooperate with the KCC Board of Directors and staff." It is also why the founding board/management said that "the Administration will be counting on the Residents Association for advice" and why the Chair of the Board Alan Hunt said "resident participation gives us wise guidance and can save us from ghastly errors."

This Part Three therefore looks for clues about what would be needed for a revival of KAL's founding "we" style by looking at some post-COVID examples in which KAL's character of place has been weakened by board/management decisions for which there was no adequate community discussion in advance.

Of the following six examples of post-COVID decisions that suffered from absence of resident input, the first two appear to have no room remaining for community modification, but they still offer lessons about the need for community discussion before board/management decisions. The four subsequent examples are ones for which there do still seem to be possibilities of amelioration through collaborative discussion.

Two Post-Covid decisions currently beyond discussion
but still offering lessons
about the need for community involvement

1. The disaffiliation from The Kendal Corporation:

KCC board discussion of possible disaffiliation from The Kendal Corporation created at Kendal at Longwood in 1989 went on for several years before any residents knew it was even being considered except residents on the board, and they upheld the board's secrecy about it. Consequently, the announcement to the KAL community on April 17, 2023, was a complete surprise and thus a compounder of distrust. In addition, articles written after the announcement indicated that community discussion in advance might in fact have made a difference in how the issues were handled.²¹

Although the disaffiliation itself may be a settled matter, at least for now, the process by which it was decided offers lessons. For example, it has intensified concerns about resident representation at KCC board meetings. The 2018 Report of the KRA Working Group described above includes a comparative chart showing that the KCC board has lagged behind other affiliates of the national Kendal Corporation in both relative numbers of resident representatives and in their roles. With regard to numbers of resident members, the KCC board has chosen to keep itself smaller than other boards even though the KCC has the largest number of residents. Because board size determines the number of residents on the board, the KCC board's choice to be small has meant that the KCC board has minimal resident representation, with only one resident from each of its two CCRCs. It is widely recognized in discussions of representation that it is typically very difficult for a single representative of a subordinated group to be heard by a board, whereas two, and even better three representatives, can be a voice in a deliberation.

2. Insertion of apartments into the new wing of the Center

A major post-Covid top-down board/management decision made without community discussion in advance has been the decision to insert apartments into the new wing of the KAL Center. This decision warrants consideration at greater length than the other examples here because it has lessons in multiple areas in addition to problems of the building itself, including issues of financing in general and issues of community fragmentation.

One impact of the inserted apartments is that by increasing the number of residents at KAL, the insertion moves KAL further away from its intended face-to-face size, as did the opening of the New Cottages in 2012. As noted in Part One, there is a literature about community size that indicates that for KAL an increase beyond the size of about 350 the founders considered a maximum risks fragmentation of the community, divisions into "us/you."

The current plan for the apartments in the new wing also works against KAL's founding aspiration to affordability by moving the distribution of the prices of KAL's residences dramatically further toward the high end.

Inserting apartments into the Center also greatly increases the total physical size of the new wing and thus increases its impacts on the building's environment. The environmental damage includes extending parking into the upper end of the Harlan Glen itself so cars for the new apartments can be parked right outside the door. If residents had been a genuine part of the planning of at least the parking, they would most likely have pointed out adjustments more in harmony with KAL's character of place. For example, the new residents could walk a bit to their cars, perhaps to Lot 2, as other residents have walked since KAL's opening in order to minimize cars in the interior of the campus. Residents have not objected because so many have been drawn to KAL by its natural setting. In addition, the walking could be beneficial for those in the new apartments capable of it, since the apartments will have no individual gardens, and residents will not go outdoors to visit their mailboxes, the library, etc. Priorities about which group most needs adjacent parking could be adjusted as well, since staff parking could then be closer to the Health Center entrance, a help especially during the 11 p.m. staff shift, particularly in the winter or rain.

The insertion of the apartments of course also raises the building's costs. These include not only the original design and construction costs but also the ongoing costs of staffing and maintenance and the related costs (and problems to be considered below) of enlarging the Center's café to accommodate the increased number of residents, who will also increase usage of other facilities.

Approaches to financing

The approach to financing illustrated by the new wing is worthwhile for the community to discuss even if the new wing itself is a settled matter, because financing is such a major and recurring topic. The insertion of the apartments offers an especially clear example of a particular approach to financing, since gaining the entrance fees for the apartments is the only justification that has been offered for inserting them despite their negative impacts.

One consideration is that the current financial plan involves heavy borrowing, because the entrance fees will not come until the apartments are occupied, and the interest costs of the borrowing greatly increase the total costs of the building. The size of the projected debt has even led some residents to concerns about whether inserting the apartments to gain revenue actually makes the overall financial situation of the KCC, and thus the situations of present and future residents, stronger or weaker. This is a topic for which something like a panel discussion including people adept at providing intelligible explanations for a lay but capable of learning audience could be helpful, both in this case and in general.

One topic such a panel or other presentation could address is that financing by continual building to gain new entry fees is an approach criticized by the National Continuing Care Residents Association (NaCCRA), even though the approach is followed by numerous other CCRCs as well as the KCC. The NaCCRA's 2022 (i.e. post-COVID) *Financial Soundness Handbook*, written for prospective CCRC residents and available on the NaCCRA website, says that

"Proper utilization of Entrance Fees should be carefully monitored. If the Entrance Fees of new residents are used largely to support the services promised to the cohorts of residents who entered in earlier years, there is a danger of the organization drifting toward Ponzi-type financing." [p.28]

Although reference to a possible "Ponzi" hazard may be objectionable since no one thinks the KCC has any such intention, rejecting it depends on presenting an alternative account and presenting it fully and clearly enough to be accessible to residents of KAL, a highly educated audience committed to KAL and prepared to work at understanding.

The KCC board/management's reply to concern about financing so far appears to be that the current large size of the KCC Reserve Fund and the plan to shift part of the cost of the building to the future residents makes concerns, including the NaCCRA concerns, irrelevant to the KCC. However it has been pointed out that there are many present and future demands facing the KCC Reserve Fund, and that, because entrance fees are said to be recorded in an account used for all KCC finances together, it may be difficult to readily determine the source of any cash expenditure such as payments for interest on loans. There are also further concerns if the Reserve Fund becomes collateral for the expensive borrowing projected for the new building. Thus actually intelligible discussion of KCC financing is important and could also model all-constituency discussion in general.

"We/you folks"

The need for models of discussion at KAL that can result in mutual understanding among all its constituencies was illustrated at a meeting scheduled by the board/management in 2022 to give KAL residents an opportunity to ask questions about the board/management's (already decided) plan to insert apartments into the new wing, including questions about its financing. The meeting was another illustration of the problems of replacing a practice of actual community discussion before board/management decisions with practices of such as merely "keeping residents informed" through something like some Q&A after a board/management presentation of a prior top-down decision.²²

In the Q&A period after management did a walk-through of a slide presentation of its insertion of the apartments, a highly respected resident with past experience on financial committees pointed out possible alternative financial approaches and also pointed out that concern about the insertion "isn't just about finances," referring to impacts of the building on features of KAL's character of place such as the environment and the risk that increasing the number of residents could lead to fragmentation of the community into subgroups. The resident read a brief but carefully prepared description of a possible alternative approach to the financing, including alternative figures and showing the possibility of a financially responsible tradeoff between such considerations as the desire of management to keep the KCC reserve fund at the top of the charts in relation to other CCRCs and the desire of community members to support features essential to KAL's character of place.

Management's response consisted of only a few sentences that did not include any mention of the possible tradeoff described by the resident nor of the alternative figures offered or of the issues raised by the high costs of the borrowing proposed. After the few sentences of this brief and unresponsive response, management simply moved on to the next question.

The speed with which the inquiry was bypassed was, among other things, an illustration of the problems of loss of KAL's founding practices of full community consideration of issues. Not providing for adequate discussion is especially problematic in a community founded by Quakers. Quakers understand that discussions of practical matters need to come to a close, and they have provisions for meeting that need. But Quakers also recognize the potential fruitfulness of adequate discussion.

For example, an editorial in the business magazine *Forbes* notes the impressive successes of Quakers in the history of business and finance and observes that companies with Quaker approaches "do not let anyone impose a decision on the group" but take as much time as they can to try to let a sense of the meeting emerge. The *Forbes* observation ends with a statement by a prominent management consultant about the benefits of openness and taking time for shared and inclusive reflection:

"Studies show that half of management decisions fail.
Quaker practices can help businesses make better decisions."²³

It has been suggested that issues such as finance cannot be usefully discussed in large meetings, but that is not always true, as witness the very large size of economics classes in colleges and universities. In addition, avoidance of genuine discussion by the board/management has been experienced in small committees as well, and by individuals. Nor has the KRA yet returned to the role of orchestrating all-constituency discussion of issues.

Not only was there no community discussion before the decision to insert the apartments but the decision involved discarding an earlier process that did include community discussion. In that earlier process, members of KAL's Health Center staff had worked for several years, including making presentations to the community, to agree on a "program" for the long needed rebuilding of KAL's fifty year old Health Center. A formal design proposal for a new Health Center based on that carefully developed program was discussed with the community and developed into an architectural sketch which the KCC board submitted to the Township of Kennett in February of 2022.

But only a few months later the board/management, without community discussion, replaced that plan with the current plan inserting the apartments. The shift was said to be necessitated by the sudden rise of interest rates in the U.S. in April of 2022. However that rise need not have precluded community discussion about possible alternative responses to the rise such as the alternative proposed by the resident in the 2022 meeting. Discussion would also have avoided increased resident distrust of the board/management.

Different agendas

Current lack of all-constituency conversation about choices such as those related to the Health Center, including its financing, has also contributed to development of different agendas within the community on other topics and thus to development of “us/you all” divisions. Such division was illustrated in a KAL budget meeting on 01/17/2023 in which the CFO dismissed a number of resident interests and described a differing board/management agenda as follows:

“I know there’s a lot of passion about the deer fence and the Big Woods. There’s a lot of focus on hydroponics and that type stuff. There’s a lot of focus on solar. There’s a lot of focus you folks have on a lot of beautiful things and good things and important things. But at the end of the day, our [i.e. the board/management’s] number one priority is providing you good quality Life Care. That’s our contractual obligation and our commitment. The second most important thing is creating a good workplace for staff. They are the two primary issues that we [i.e. the board/management] are going to address first and foremost before bargaining and going down the road on all these other things.... [40:03 ff.]

In this fragmentation of the community by dividing it into “we/you folks,” important issues were simply passed over. These included issues raised by the undefined use of the word “good” in the references to “Life Care” and “workplace.”

The question of what makes KAL’s lifecare “good” involves more than its formally “contractual” aspects, just as that the question of inserting the apartments “isn’t just about finances.” Residents have indeed chosen KAL for the strong “contractual” aspects of its healthcare, but such aspects are also available elsewhere, and good health at KAL also rests on elements of its character of place such as its greater simplicity compared to CCRCs that advertise “luxury” or “resort” living, its distinctively beautiful natural setting cared for by residents and staff together, its aspiration to be affordable by retirees from “lives of service,” its face-to-face size, its resident-organized activities, and its aspiration to be a community based on what Lloyd Lewis called “the interdependence” of all its constituencies.

Similarly, with regard to KAL to whether KAL continues to be a “good” workplace, there needs to be consideration of the problem that among KAL’s current staff, including long term staff treasured by residents, there are concerns about erosion of KAL’s founding character of place that parallel those of residents.

The most serious problem with the 01/17/23 budget meeting statement is its division between board/management as “we” and residents as “you folks,” presented here in terms of sheer power, an announcement that “we are going to....” Divisions of power are always needed in complex organizations, but how that power is exercised, whether in a collaborationist or top-down way, is a choice of “style” that rests particularly with the holders of power. Proposals for restoration of community, of a “we” to which all community members can have a sense of

“belonging,” seem again to be a fundamental contribution a revived KRA might be able to make. Restoration of community is what the 2018 Report of KAL’s “Working Group” called for in the context of the crisis that led to the board’s decision to create a task force on structure, and it is echoed in the concern for “belonging” in the “Report of the Task Force on Values in Practice.”

Post-Covid top-down decisions for which there could still be ameliorations

The choices to be looked at in the following examples further illustrate the problems possible in decisions related to character of place that are made without prior community discussion, but they also illustrate the possibility of working toward ameliorations of the impacts.

3. Fee-for-service for computer and other digital/electronic assistance.

An noted earlier, KAL’s founders kept KAL as free of extra fees as possible, saying that
“we avoid applying extra charges for individual services or additional options whenever possible, providing the same level and quality of services to all residents. In this way we eliminate economic distinctions among residents and preserve the egalitarian nature of our community.” [*Values and Standards*, 1987, p. 13]

The current board/management has made moves away from this founding policy without community discussion, beginning with the establishment of KAL provided home care for a fee. There have always been economic differences among KAL residents reflected in the entrance and monthly fees, but beyond that, the board/management itself has remained economically neutral on principle, “providing the same level and quality of services to all residents.”

A post-COVID example of top-down movement away from that principle without community discussion is the imposition of management imposed fees for computer and other digital/electronic assistance as announced in the following 1-25-2024 management posting on kalresweb:

“Resident Support Technician Services will soon have a service fee – see KCC Connect for details.”²⁴

From the perspective of KAL’s founding character of place, the announcement is a departure in at least three ways. For one thing, the shared life of the community has always been meant to be equally open to all as far as possible. But KAL’s community life is like the life of the rest of the modern world in being increasingly digital and electronic in community activities and information, its website, zoom, email and so on. Consequently seeking to provide equal access to that is like seeking to providing equal access to the dining room and auditorium and other community spaces.

A second problem with the fee for service announcement is that requiring that residents go to KCC Connect for the relevant information compounds the exclusion of digitally challenged residents, since the residents who need assistance in connecting to the digital and electronic aspects of the community are the very ones for whom the extra level imposed by KCC Connect amounts to an exclusion, even as that extra level is a reduction in ease of access community information for everyone in what appears to be another consequence of the KCC's 4-campus problem and KCorp disaffiliation.

Third, the imposition of the fee-for-service for electronic assistance disregards one of KAL's founding strengths, namely the ability and willingness of residents to collaborate with staff in meeting community needs, as illustrated by the Wheelies, the Haulers, the Zoom team, the Sound & Light team, the Ushers, the various sorts of grounds tenders, and on and on and on, collaboration which is satisfying to the collaborating residents and staff as well as a help to the beneficiaries of their work. In the area of computer help, a resident who is a digital expert has resumed his pre-COVID volunteering of help by sitting outside the Café every Thursday ready to give free assistance to whoever comes, including explaining when a problem does indeed need use of an outside resource. It would not have taken much for there to be a whole team of resident computer volunteers, if management had let it be known that it was considering spending resident fees to hire expertise from outside. There are certainly many things for which outside help is needed at KAL, but there are also things which can be better done by KAL residents.

4. Replacement of the *Values and Practices* booklet by the *Cornerstones* booklet

The *Cornerstones* booklet is very small – two 8.5x11 sheets folded in the middle to make an 8 pp. booklet – and it can be seen at either of the following links:

<https://www.kendal-crosslands.org/values/> or https://www.kendal-crosslands.org/wp-content/uploads/2023/11/Cornerstones-Brochure-FINAL_web.pdf

Cornerstones came about as one result of the KCC's disaffiliation from KCorp. After KCorp was created in 1989, *Values and Standards* was eventually revised and retitled *Values and Practices* to become the brochure for all of the affiliates. The KCC did not then create a brochure of its own because as a KCorp affiliate, it could use *Values and Practices*. When the KCC disaffiliated from KCorp, however, the board/management decided it wished to have a booklet of its own, which turned out to be *Cornerstones*.

One fundamental difficulty with *Cornerstones* from the perspective of KAL is that in seeking to be a booklet for all four campuses, *Cornerstones* cannot convey the individual character of place of any of them. It contains none of the specifics found in *Values and Standards* such as avoidance of fees-for-service nor any other specifics beyond a few details such as the dates of the openings of the four campuses. The word "Quaker" occurs a few times but without any characterization that would prevent substitution of some other denominational or

organizational label. The result is that *Cornerstones*, like the *Report of the Values in Practice Task Force*, could be adopted by any good CCRC with minimal editing, so it has little to offer a retiree trying to decide between one CCRC and another.

It may seem puzzling to include *Cornerstones* in a list of examples of problems that arise when decisions are made without community discussion in advance, because the board/management process of generating *Cornerstones* included an array of meetings with residents. However those gatherings are instructive here because they illustrate differences between genuine discussion and token inclusion. Neither the process by which the participants were selected nor the way the gatherings were conducted was significantly different from “focus groups” conducted by marketers or pollsters.

The basic process of selection for board/management-convened committees has come to be KRA submission of a list of names from which management itself chooses the members. When the meetings are also management-directed, as illustrated by a number of the 4-campus committees, the meetings have tended to be either Q&A about management chosen materials or events at which residents are invited to speak in “silo” style, perhaps a trip “around the circle.” One person is invited to make a statement, preferably speaking in only the first person, and then the next person does the same, with back-and-forth discussion not included. Silo-style can work when there is no time limit for how long the process may continue and there is in addition a skilled listener who periodically reflects to the group a sense of the directions thinking seems to be taking. By contrast, a relatively random collection of individual statements in a limited meeting time does not seem to provide genuine exploration of topics, nor does there seem to have been full circulation of drafts of the potential booklet among the participants for comment.

5. Bicycling and tornadoes

Board/management declaration of a bicycle “Policy” without community discussion in advance led to a protest meeting in the KAL auditorium on 2/16/2024. Members of KAL’s large population of resident bicyclists, many of them lifetime bicyclists, gathered to protest both the “policy” and the mode of its announcement, and it was clear that they had more understanding of “fine points” of bicycling at Kendal and Crosslands than did the announcers of the “Policy.” Because of the basic good will and senses of humor of both the residents and the staff involved, the gathering developed into the sort of meeting that could/should have been held in advance, and the result was replacement of the faulty “Policy” by “guidelines” more suited to the realities of bicycling at KAL.

If such meetings or other forms of adequate community discussion were normally held in advance, something that the KRA could help develop ways to facilitate, the discussions could be sources of strength and satisfaction for all constituencies, as contrasted to the stress and community division inseparable from a meeting attempting a repair after the fact. That staff

are fully capable of such advance “vetting” was subsequently shown by advance distribution of proposed Tornado guidelines in draft with a request for comments.

6. The food court of the new café and KAL’s continuum of resident participation

One of the features of KAL’s character of place has always been minimizing divisions of the community based on mobility, cognitive challenges or other dimensions of health. Strengthening the continuum of resident participation was greatly advanced at KAL’s opening by its “Untie the Elderly” program, which was created by KAL’s first Health Director, Jill Blakesley, and was soon famous nationally and internationally.²⁵

A weakening of the continuum of participation has unfortunately resulted from the commercial design of the food pickup court of KAL’s new Café. Various aspects of the remodeling of other areas of the café are successful, such as the better acoustics of the main seating area and the emerging provisions for display of resident and staff artwork. But problems in the design of the food pickup area make it difficult or even impossible for a mobility-challenged resident to collect a meal.

The problems include absence of enough places to rest trays at the various “stations” for collecting different sorts of food and also a confusing separation and allocation of the “stations.” The problems became apparent as soon as the Café opened, and resident concerns about it were raised in the Q&A section of the “CEO Forum” of 3/27/2024 and again in the Q&A portion of the KRA meeting of 04/08/2024.²⁶

The difficulties presented by the design of the food pick up area have been compounded by an administrative top-down decision to end the previous practice of waited service for mobility challenged users in the KAL Café. The waited service was apparently never actually intended in the first place, nor has it been factored into decisions about numbers of staff, nor has it existed at Crosslands. It simply grew up at KAL because of the kindness and generosity which has always characterized the staff of KAL’s Culinary Department.

Unfortunately some users of the old café had begun to make the waited service a problem through inappropriate requests or conduct such as table banging or shouting out to staff. Consequently the redesign of the café seemed to the KCC management an opportunity to end the practice, but unfortunately the ending was done by a top-down announcement for which there does not appear to have been prior community discussion, and it was done without apparent recognition that it would combine with the design problems of the food pickup area of the new café to exclude an important segment of KAL’s resident population from use of the café.

The exclusion is actually a problem for all residents because the particular segment that has been most noticeably excluded is a vital link in KAL’s continuum of participation and belonging.

That linking segment is residents, especially residents living in Cumberland, who have developed significant mobility or other health limitations but who were nonetheless frequent users of the old Café. These residents have been especially important because they regularly move among other segments, spending time both with IL residents in areas such as the café and with Cumberland/Westmoreland residents who have become too impaired to go to the café themselves or to other parts of the Center. If this linking segment is kept unable to use the new café because of the design problems of the food court, the loss to all of KAL is a significant one.

The design problems of the food court appear to have resulted from insufficient inclusion of resident or even full culinary staff participation in the design process. Two of KAL's standing committees, the Culinary Collaborative Committee and the Interior Design and Décor Collaborative Committee, participated successfully in the planning of their respective aspects of the new Café, but neither those committees nor any other resident representatives nor perhaps even all relevant staff appear to have been asked to critique drawings of the proposed food court in the design phase of the project. The design appears to have been turned over to an outside commercial firm which appears to have proceeded without discussion of drawings with residents and staff familiar with the workings of the old café or with actual KAL life in general, a common risk in reliance on outside consultants.

Related concerns about dining patterns in relation to the continuum of participation have been expressed about the new Health Center dining area which is to be placed at the far eastern end of the long corridor that will stretch from there through the entire Center to important community spaces such as the Auditorium at the far western end of the Center. What will be the experience of someone, especially someone with mobility challenges, who eats dinner in the new Health Center dining area at the eastern end of the corridor but would like to attend an after dinner event in the auditorium located at the far western end?

And how will the new Health Center dining arrangements relate to the main dining room as well as to the Café? Is it anticipated that the Independent Living residents in the new apartments will eat in the closer Health Center or in the more distant main dining room or where? Is the overall pattern that may emerge from the new apartments and the Health Center renovation likely to be one that strengthens or weakens the continuum of participation?

KAL has the great good fortune to have splendid Health and Culinary and other departments, but the presence of puzzles like the emerging dining puzzles draws attention to the problem that since the dropping of the triad administrative structure in 2013 there is no member of the senior staff focused on how all the various individual departments and other aspects of KAL can fit together to support the cohesive community KAL was meant to be, nor has the KRA addressed such topics in the years since the board/administration stopped "counting on the

residents association for advice.” How can today’s KAL community as a whole consider such questions as how all the construction and addition of new residents in the eastern portion of the Center will wind up relating to the original western portion of the Center and existing community members and staff there?

Counterexamples

In seeking to learn from these examples of post-COVID decisions made in the more top-down style without adequate community discussion in advance, it is important to remember that they are not the whole story. That KAL retains the potential for all-constituency collaboration is shown by counterexamples such as the work to save the Big Woods and the collaborative progress in the important challenges of achieving sustainability. The question is how such collaboration can be the norm for KAL.

Conclusion

Conclusions from this review of aspects of KAL’s history and of recent decisions include the following:

One, when KAL in the 1980s began to move away from its founding practices of all constituency conversations before board decisions, it began to see erosions of its founding character of place.

Two, the KRA in 2024 could begin working toward repairs of erosion by making provisions for all-constituency discussions about what relationship today’s KAL wishes to have to the features of its founding character of place. One way to do that could be for the KRA to follow up on its successful Values in Practice Task Force by creating a Character of Place Task Force or some other arrangement to orchestrate and report community discussion.

2024 seems an auspicious time for taking up the question of what KAL wants to be today because the impending waves of Baby Boomer retirements mean that KAL is likely to have a growing number of applicants in the coming decades, especially since KAL is considered highly desirable among CCRCs, as reported at the 7-24-2024 CEO Forum. If the KCC in its current process of choosing a new head of “Marketing,” chooses someone who would like to and is able to support KAL’s founding character of place, the increase in CCRC applicants as the Baby Boomers retire seems likely to make it feasible for KAL in these coming years to move toward repairing erosions of its founding character of place.

In addition, the KRA and KCC together could make provision for discussion of topics related to KAL’s founding character of place such as whether today’s KAL wishes to reaffirm the founding goal of being affordable by retirees from lives of service by reaffirming such practices as a “fee

structure which socializes costs in such a way that people of lesser means are able to join our community.”²⁷ As noted earlier, private schools and colleges which explicitly follow this “socialization” approach with regard to tuition find that it does not simply bring them very good students who would not otherwise be able to enter. Because the practice is publicly known, it can reduce economic resentment or defensiveness for everyone because it is recognized that the top fee payers are just as likely to be supporters of the social values of the institution as are the recipients of the scholarships. A reaffirmation of KAL’s aspiration to affordability by retirees from lives of service could begin with a clear reaffirmation of the founding practice of adding a premium to the prices of large units in order to make small units affordable.

If practices can be developed for informed, all-constituency discussion of topics such as this, there seems every reason to be optimistic that KAL can find a way to “sail upstream” in today’s U.S. society and restore the features of its founding character of place that led so many of us here today to choose KAL rather than some other CCRC.

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ENDNOTES

¹ *Kendal Reporter*, May, 1973, Kendal Digital Archives.

² Quoted in Ruth Malone, *The Story of Kendal at Longwood*, PA: KRA, Kennett Square, 1995, p. 19.

³ *Values and Standards*, p. 6.

⁴ 11/11/2022 video “Health Center Renovation,” <https://www.youtube.com/watch?v=TETGEBKg9wM> Accessed 4/14/2024.

⁵ Corporate law is a rabbit warren, and the account here is a simplification of multiple legal steps including renamings, etc. Complex legal steps have been taken throughout the history leading to what is now the KCC and the Kendal Corporation, and many of these steps have been impressively and helpfully sorted out by Harry Hammond in material submitted to the Kendal Digital Archives. The most recent chapters in the legal history are the KCC’s decision to disaffiliate from KCorp in 2023 and the 2024 forging of a trust agreement about the word “Kendal” in the aftermath of that KCC’s disaffiliation.

⁶ Sally Worth’s daughter Lark Worth, later a longtime and valued resident of KAL in her own retirement, remembered being put to work as a teenager hanging pictures for KAL’s first residents, called “Founders,” as they moved into their cottages in 1973.

⁷ Quoted in Parsons, *An Act of Faith: The Kendal at Longwood Story*, 1988, p.1. A photocopy is available in the Kendal Digital Archive.

⁸ <https://kendaljourney.com/2023/02/04/harry-hammond-on-the-founders-vision-for-kendal/> or https://www.youtube.com/watch?v=To8_0WE2ydc Accessed 01/14/2023.

⁹ Correspondence to the author from a member of the Senior Staff.

¹⁰ A sample of the literature of “competitive advantage” and its history is Kevin D. Tennent, “The Age of Strategy: From Drucker and Design to Planning and Porter” in B. Bowden et al., eds., *The Palgrave Handbook of Management History*, Springer 2018, https://link.springer.com/referenceworkentry/10.1007/978-3-319-62114-2_36 . The article’s “Abstract” explains that the article “follows the development of the strategic management discipline from the late 1930s to the early 1990s by considering some of the important works in the field, demonstrating **how strategy [beginning in the Reagan Era] detached itself from the broader managerial and societal concerns of organizational purpose reflected in the works of authors in the field before 1975.**” [emphasis added] The article’s “Concluding Remarks” begin as follows: “The history of strategic management into the 1980s and 1990s saw a narrowing of focus, from a... paradigm of the

manager as a ‘renaissance man’... directing productive resources for societal and organizational good to a much tighter definition around the achievement of ‘sustained competitive advantage.’”

¹¹ Love & Company, “Strategic Pricing and Positioning Analysis for Kendal-Crosslands,” Dec. 15, 2014, p. 11.

¹² Judy Braun, “Kendal Crosslands Communities Report on Restructuring Discussions – April 29, 2013,” issued together with a June 14, 2013, cover memo from the Kendal-Crosslands Communities Board of Directors headed “Subject: Overview of the Process for Exploring Potential Organizational Restructuring for Kendal Crosslands Communities.”

¹³ Quoted by the *Kendal Reporter*, Aug., 2013.

¹⁴ Kendal Residents Association board meeting, Nov. 8, 2021: YouTube “KRA Board Mtg 2021 11 08” at 20:35 <https://www.youtube.com/watch?v=M1vn1SMc2xY> at 20:35. Accessed 11/12/2021

¹⁵ The KRA board discussion of creation of the Working Group is reported in detail in the Sept. 11, 2017, minutes of the KRA, including the text of the formal proposal actually adopted.

¹⁶ Minutes of the KRA meeting of Sept. 11, 2017.

¹⁷ [Enhancing Communication with Community: Kendal at Longwood Residents Association Working Group Report](https://www.kalresweb.org/home-page/kra-working-group-report/), July 5, 2018, p.10 Available at <https://www.kalresweb.org/home-page/kra-working-group-report/>. Accessed 4/17/2021. The Report describes some changes of Group membership as the work progressed, but the members as listed on the report’s cover were “Tricia Dewey, John Gould, Harry Hammond, Margie Herbert, Ernie Kimmel, Vi Luginbuhl, Charlie Reinhardt, Gib Robinson, Betty Warner and Barbarajene Williams.”

¹⁸ Oct. 3, 2018, Letter from Richard Wortmann, the Clerk of the KCC to the Co-Clerks of the KRA Working Group.

¹⁹ The Co-Chairs were Donna Taylor, Director of Health Services, and Ernest Kimmel, a past President of the KRA who had been a member of the Working Group. The other resident members were Judith Downing, Ruth Greenberger, Peter Hillyer, Nell Kruger, Margaret Rovner and Barbarajene Williams. The other staff members were Jill Arbiz, Phil DeBaun, Sarah Matas and Diane Williams.

²⁰ “Transition Update #9 – June 21, 2019” (emphasis added). The members of the Transition Committee were Richard Wortmann (then Clerk of the KCC Board), Sean Kelly (then President of the national Kendal Corporation), and Marvell Adams, Jean Caulfield, Kay Edstene, Sue Renz and Tom Paxson.

²¹ Two resident articles showing how the topic might have benefitted from community discussion in advance of the decision are George Alexander, “Withdrawing from Kendal Corporation: ‘it’s a business decision’”

<https://kendaljourney.com/2023/04/21/withdrawing-from-kendal-corporation-its-a-business-decision/> and Harry Hammond, “Our Kendal’s Changed Sense of Self,” <https://kendaljourney.com/2023/05/01/our-kendals-changed-sense-of-self/>. Accessed 11/3/2034.

²² 11/11/2022 video “Health Center Renovation” at 1:03 ff (with other points in the video also relevant).

<https://www.youtube.com/watch?v=TETGEBKg9wM> Accessed 4/14/2024.

²³ Margaret Benefiel, “Doing Business the Quaker Way,” at <https://www.forbes.com/2009/10/09/quaker-business-meetings-leadership-society-friends.html?sh=4b7217b029fa>. Accessed 7/14/2021. Another discussion of Quaker business is a 2012 blog post by David K. Hurst including references to his 2002 book *Crisis and Renewal*.

<http://www.davidkhurst.com/the-spirit-of-capitalism-the-quakers-and-the-first-industrial-revolution/> .

²⁴ <https://www.kalresweb.org/2023/01/25/news-you-can-use/> .de

²⁵ The founder was Jill Blakeslee, KAL’s first Health Director, with the active collaboration of KAL’s first Executive Director Lloyd Lewis, who hired her in 1973. For a 1989 Symposium of the Senate Special Committee on Aging honoring it, see the .pdf of the 1989 Senate session at <https://www.aging.senate.gov/imo/media/doc/reports/rpt589.pdf> .

Kendal’s Untie the Elderly program was such a contribution that there was a special Senate hearing recognizing it and its founder, Jill Blakeslee. Her article about it, “Untie the Elderly,” appeared in the *American Journal of Nursing*. 1988Jun; 88(6): 833-4. The account of the Senate hearing can be found at

<https://www.aging.senate.gov/imo/media/doc/reports/rpt589.pdf>. Accessed 5/20/2021. Another valuable account of

the program was given by Blakeslee’s KAL colleague Beryl Goldman in a June, 2021 interview conducted by George Alexander and available in the “Oral History” section of the KAL Archives at <https://www.kalresweb.org/home-page/resources/digital-archive/> at

<https://u.pcloud.link/publink/show?code=kZOcv2XZYWiEmPidPhkU7wy7II26M8WVOFU7#folder=9662659385&tpl=publicfoldergrid> Accessed 12-6-2021.

²⁶ Harry Hammond at the CEO Forum. See https://www.youtube.com/watch?v=WR4Ga_Jnk_Y at 1:02:40.

²⁷ *Values and Standards*, 1987, p.13.