

VALUES IN PRACTICE: SERVING

A SENSE OF COMMUNITY

Enhancing the Quality of Life

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

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

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

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

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

Fostering Independence and Community

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

Mutual assistance and a sense of community grow naturally when community members take responsibility for conducting their individual and group activities. Independence and self-sufficiency are supported, in part, by not providing some services that community members, individually or cooperatively, are able to provide for themselves. For instance, we typically do not employ activities directors except in health center settings for those residents who need

such assistance. Rather, associations made up of community members organize virtually all aspects of social, cultural, intellectual, and spiritual life.

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

Building Mutual Respect Among Community Members and Staff

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

CONTINUING LEARNING

Nurturing a Spirit of Inquiry and Continuing Learning

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

WELCOMING DIVERSITY

Supporting a Spirit of Inclusion

Kendal strives to create and support an environment for community members, board, staff, and volunteers that is welcoming to all cultures, backgrounds, and differences—an environment that promotes mutual respect, acceptance, cooperation, and teamwork. Our commitment to diversity flows from Kendal's Quaker roots and our published Values and Practices. We believe that a spirit of inclusion and a culture of diversity enrich and strengthen our communities, people, and services.

WELLNESS PROGRAMS AND HEALTH CARE SERVICES

Wellness for Life

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

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

High Quality Health Care Services and Wellness Programs

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

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

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

Promoting Well-Being in Health Care Settings

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

When Loss of Independence Occurs

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

oneself as much as possible.

Caring for the Very Frail

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

Ensuring Dignity at the End of Life

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

PHYSICAL SETTINGS

Designing to Enhance Quality of Life

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

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

ENVIRONMENTAL STEWARDSHIP

Conservation, Sustainability, and Leadership

Kendal embraces its deeply felt responsibility to be concerned about the appropriate use and conservation of the earth's resources. In building our physical communities and in the daily operation of them, we strive to conduct all of our activities in an ecologically sound and socially responsible manner. We support the concepts of ecological understanding and sustainability, including energy conservation. We work to deepen our understanding of the principles,

concepts, and techniques through which we can improve the sensitivity with which we design, construct, and operate our environments—seeking, along with increasing numbers of other people and organizations around the globe, “to tread ever more lightly upon the earth.”

VALUES IN PRACTICE: ADMINISTERING

FINANCIAL INTEGRITY

Providing a Sound Financial Foundation

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

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

Serving Our Social Objectives through Financial Design

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

To the extent possible, we strive to serve people from a broad spectrum of economic means, to reduce economic distinctions, and to preserve an egalitarian spirit. Most Kendal communities have reserve funds that may provide fee subsidies to residents in need. These funds have been contributed or set aside for this purpose, and current residents who become unable to pay the full monthly fees may apply to the assistance funds for help. Some Kendal communities also offer entry fee assistance on a limited basis, and some of the skilled nursing facilities in the Kendal System participate in the Medicaid program, serving individuals from their local areas in addition to those who live in the residential or assisted living portions of their communities.

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

STAFF RELATIONS

Maintaining a High Quality Work Experience

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

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

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

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

An Effective Staff Education Program

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

VALUES IN PRACTICE: SHARING

MANAGEMENT AND GOVERNANCE

A Federal-Style System

Kendal is a federal-style system of communities and services. We recognize that the whole is more than the sum of its parts; the vitality and freshness that come from the combination of decentralization and active engagement stimulate creativity and improve effective collaboration at all levels. Sharing model practices across the Kendal System enhances the quality of all we do, creates a spirit of inventiveness, and inspires high morale.

Excellence in Management and Governance

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

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

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

Continuing Evaluation

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

Taking Responsibility in the Larger Community

Just as we encourage our community members, boards, and staff to be involved in the larger community as individuals, we believe that each Kendal affiliate must be a responsible member of the larger community. To this end we strive to be good neighbors, use responsible business practices, be good stewards of the environment, maintain ethical relationships, and build good relations within the local community. It is our practice to make fair and reasonable payments to local governments in order not to add significant burden to municipal services. We keep our immediate neighbors and local authorities informed of plans for development.

Whenever possible, we share our resources, knowledge, and facilities with the larger community. Staff members are encouraged to share their skills with local groups through speaking engagements, workshops, and other educational programs.

AN ACTIVE ROLE IN THE FIELD OF AGING

Shaping Policies and Educating

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

The Not-for-Profit Perspective and Accreditation

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

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

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

OUTREACH

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

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

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

- giving leadership to the development of model statutes, regulations, and an accreditation system and standards for continuing care retirement communities;
- collaborating in the creation and testing of computerized health and wellness assessment tools;
- formulating model practice protocols for clinical care;
- offering development programs for emerging leaders;

- partnering with others to develop and disseminate research-based systems of evaluating client outcomes in long-term care settings;
- collaborating in an increasingly wide array of creative, locally inspired initiatives.

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

GROWTH AND DEVELOPMENT

Looking Forward

Kendal strives to look and move toward the future. Kendal seeks to attract a broad spectrum of future community members, takes strategic planning seriously, and explores the leading edge of technological improvements.

New Opportunities for Service

In pursuit of our mission, we are committed to broadening our work, to serving more people and people of diverse backgrounds, and to meeting their needs in new and innovative ways. We actively seek opportunities to explore the development of new services and communities, possible affiliations with existing organizations as additions to the Kendal System, and other collaborative work with similarly motivated people and organizations with durable relationships in mind. Kendal has a history of, and reputation for, working sensitively with local groups interested in starting Kendal organizations in their areas and with local and state officials in obtaining regulatory approval and financing. Kendal constantly works to maintain its reputation as a good community citizen.

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

THE ROLE OF GENEROSITY

Those involved in the beginning of the first Kendal community set a tone of generosity—of spirit, of time, of talent, and of resources. Indeed, the Kendal story began with a gift.

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

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

Our vision of Kendal as a system characterized by unusual generosity is expressed in efforts to make a difference in people’s lives beyond the affiliates—in an outreach program delivering housekeeping services to lower income area residents and in generous contributions to local institutions. In addition, tens of thousands of volunteer hours are given each year by hundreds of Kendal residents and staff to activities within Kendal communities and in wider local areas, nationwide, and abroad.

The call to meet needs beyond our own organizations is powerfully expressed in Kendal Outreach, LLC; its programs are supported by donations and grants from both private and public sectors.

The urge to reach out broadly and impact the quality of life for older people throughout our society is central to our continuing vitality. It rests on a charitable identity at the heart of our mission.