Kendal at Oberlin's Strategic Plan for 2022 through 2026
DRAFT 2-10-2022

Developing Kendal at Oberlin's strategic plan for 2022-26 was exceptionally challenging. The issues are well known: the COVID-19 pandemic, racial and political unrest, economic stress, rising concerns over environmental issues, a marked increase in workforce challenges, and demographic changes that had been anticipated but not fully understood. It was in this setting that Kendal developed these goals and strategies for 2022-26.

The planning process was inclusive, with nearly 300 residents, staff members, board members, and community representatives taking part in surveys, forums, and other forms of consultation. Their comments and suggestions, all gratefully appreciated, filled hundreds of pages. This is truly a plan that reflects the ideals and the aspirations of Kendal's people.

Those ideals and aspirations center around driving a strong, resilient, and resourceful life plan community on to continued success in an evolving senior living market. This is not new territory for Kendal at Oberlin: since its opening in 1993, the community has consistently demonstrated an ability to innovate and to attract outstanding residents, staff, and partners. It has grown carefully but not wildly over those years. Its plans for further growth, while they may move beyond past patterns, remain sound and centered on providing support for its base while serving a broader population.

Kendal at Oberlin's Founders – the residents who moved here in 1993 and the staff who came even earlier, and who have shaped much of what we now enjoy – will see the fruits of their work in the community we are becoming. Future residents and staff, wherever they are now, will see in Kendal at Oberlin a vibrant, warm, and welcoming place to live and work. Current residents and staff, having developed this vision and supported it in so many ways, are committed to serving in this generation-bridging role.

Kendal can do this.

[Date of approval]

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EXECUTIVE SUMMARY

A strategic plan reveals many things about an organization, including its values, priorities, and aspirations. That nearly 300 individuals participated in this planning process during challenging circumstances is a testament to the residents, staff members, board members, and others who make Kendal at Oberlin a strong and forward-thinking life plan community. This plan, which will be active from spring of 2022 through the end of 2026, includes seven goals that call for excellence in care and services, respect and inclusivity, a positive impact in the greater community and world, and future visioning.

Goal 1: Ensure the continuing strength of Kendal at Oberlin's core Life Plan Community.

> *Support and protect Kendal's mission and nonprofit status.*

> *Build financial strength through the expansion of Kendal at Oberlin's market and program offerings, effective cost management, and increased capacity for philanthropy.*

Goal 2: Improve and extend Kendal-associated health care to benefit current and expanded markets and adapt to a changing environment.

> *Continue to strengthen elder health, emphasizing support for living well with chronic illness through staffing, training, facilities, and IT modifications, always with an emphasis on person-centered care.*

> *Improve ties with hospital systems and other providers while holding down costs and building referrals.*

> *Extend, when possible, Kendal-associated care to meet needs in the larger community and to spread fixed costs over a larger base.*

Goal 3: Strengthen Kendal at Oberlin as a caring and competitive employer with the capacity to attract, retain, develop, engage, support, and advance the workforce it will need to respond to challenges and opportunities.

> *Develop nimble strategies and build adequate financial resources to successfully recruit and retain quality employees in an extremely competitive labor market.*

> *Strengthen engagement with populations of prospective employees across demographic groups and throughout a wide geographic area.*

> *Increase Kendal's focus on professional development for employees at all levels, following the value of continuing education.*

> *Foster an environment in which all employees feel valued and fulfilled in their work.*

Goal 4: Assure Kendal at Oberlin is a community that demonstrates commitments to Diversity, Equity, and Inclusion in its actions and its communications.

Provide ongoing education in Diversity, Equity, and Inclusion principles for staff and residents.

Promote awareness of Kendal's practices and messaging to ensure staff and residents understand this commitment to Diversity, Equity, and Inclusion.

Increase accessibility, including affordability, in pursuing opportunities for new prospective residents, new program development, community partnerships, and access to Kendal amenities.

Strengthen outreach to the larger community to communicate that residents and staff are engaged in achieving Kendal at Oberlin goals in Diversity, Equity, and Inclusion.

Goal 5: Strengthen the role of technology in all facets of operation and the residential experience.

Maintain and strengthen Kendal at Oberlin's infrastructure to support operations and the increased role of technology throughout the campus.

Increase access to and the use of technology in communications, marketing, security, and other areas.

Use technology to increase access to health resources, support resident health, and improve medical record keeping.

Support workforce recruitment, retention, and efficiency with technology.

Goal 6: Greatly strengthen and extend Kendal at Oberlin's conservation and sustainability initiatives, including cost-saving measures and reductions in greenhouse gas emissions, consistent with the City of Oberlin's Climate Action Plan and recommendations from its Climate Adaptation Task Force.

Strive for a significant reduction in Kendal at Oberlin's carbon emissions by 2030.

Implement changes that will make Kendal at Oberlin a more sustainable campus.

Act as an advocate, educator, and community partner for environment, energy, and climate issues.

Goal 7: Promote Kendal at Oberlin's continued health and strength through growth and evolution within and beyond the existing campus.

Cultivate a proactive culture of growth and evolution that is both fiscally sustainable and in keeping with Kendal at Oberlin's mission.

Establish criteria for evaluating all future growth and expansion opportunities. Such criteria may include but are not limited to identified priority populations; revenue diversification to keep the core campus sustainable; development of new support sources; support of Kendal's mission; enhancing the brand; diversifying the populations served; positioning Kendal for future shifts in populations.

Develop a process and resources for expedient decision-making concerning opportunities for growth and evolution.

Implement growth and evolution projects consistent with the criteria set forth above.

MISSION

Founded as a nonprofit organization based on Quaker values, we are a vibrant, diverse, inclusive, caring, values-driven, life plan community focused on healthy aging. We support individual lifestyles by promoting independence, continuous learning, engagement in and service to the wider community, social and intergenerational relationships, and excellent health care.

VISION FOR 2030

Leadership. Kendal at Oberlin will continue to be the model for innovation and quality in services, housing options, and health care for older adults in Northern Ohio. We provide supportive environments for living, gathering, and work, where love is made visible through a broad interaction among those we serve, the staff, and our boards, and where trust and shared understanding grow from open communication and listening.

Principles and services. Believing every individual should be treated with respect and dignity, we will continue to innovate and provide options to thrive through community engagement and personal satisfaction for both resident and non-resident members and for staff.

Commitment. In accordance with Kendal values and consistent with our charitable purposes, we are committed to inclusivity, outreach, social responsibility, and accountability. Through inclusive policies and programs, we will serve an increasingly diverse group of older adults with a range of financial capabilities and will operate as an employer of choice in the region. Increased reserves will offer financial assistance to members so they can remain in our community, and we will study potential ways to assist applicants who otherwise could not afford to enter.

Collaborations. In keeping with our charitable mission, we will maintain and extend our impact through Kendal affiliations and other partnerships to offer services to people in the wider community, focusing initially on health care, wellness services, and intergenerational education. In considering expansion opportunities, we prioritize partnerships before duplicated services, acquisition over construction.

Operations. We will remain focused on and known for being efficient, effective, flexible, and exceeding benchmarks in the field of aging, including minimizing fee increases for those we serve. Our standards of practice will ensure we are an excellent option across the continuum of services and for career development and employment. As an employer of choice, our goals will include creative recruitment and exceptional compensation, retention, and advancement programs. These objectives will be accomplished using fiscally responsible practices and at competitive prices.

GUIDING PRINCIPLES

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

- Quality of life, vitality, and a sense of community among those we serve.

- An environment of continuing learning.

- Inclusiveness and a warm welcome for all people.

- High quality wellness programs and health care services.

- Physical settings that are sensitive to the aging process.

- Practices that sustain and improve our environments.

- Financial designs that contribute to security and serve our social objectives.

- High quality work experience for staff, including professional development, advancement opportunities, and mutual caring and respect with residents.

- Excellence in management and governance.

- Priority attention to participation, transparency, consensus building, and resident-inspired programming.

- Responsible relationships with the larger community.

- Growth and strategies that support an active role in aging issues.

- A culture of generosity.

- Integrity, simplicity, and high ethical standards.

KENDAL AT OBERLIN'S GOALS FOR 2022-2026

Each of these seven goals is followed by two or more strategies for the five-year planning cycle. Each of these items has one or more supporting initiatives.

Goal 1: Ensure the continuing strength of Kendal at Oberlin's core Life Plan Community.

Over the past five years Kendal has made important advancements in its governance practices, strengthened its financial position, engaged with new partners, improved the campus, and introduced new programs and services – even while responding to the challenges of the COVID-19 pandemic. The strengths demonstrated during this period will undergird the organization's ability to face circumstances that challenge all life plan communities: continuing shifts in living preferences, increasing competition from new senior living developments, changes in health care, and continuing workforce challenges. The life plan community program is the heart of Kendal at Oberlin, and these strengths will be called upon again and again to support it.

Strategy A: *Support and protect Kendal's mission and nonprofit status.*

i. Reinforce our commitment to mission by reinforcing our already strong sense of community, responding to changing circumstances, and collaborating with the external community and affiliated partners.

ii. Build further strength in governance and leadership practices within the Board of Directors, the Residents Association, and the administrative team to sustain a record of extraordinary engagement in Kendal's growth.

iii. Extend Kendal's community benefit plan by expanding outreach into the larger community, while supporting the mission of Kendal and its nonprofit status.

iv. Encourage residents and staff to engage with the larger community as volunteers in efforts that address important needs and opportunities, including intergenerational activities at all levels, environmental initiatives, essential needs, and economic development.

v. Implement a community impact fund focused on addressing needs in Northern Ohio consistent with our mission and values.

Strategy B: *Build financial strength through the expansion of Kendal at Oberlin's market and program offerings, effective cost management, and increased capacity for philanthropy.*

i. Expand the market and program offerings:

    a. Consider expanding our mission through more inclusive definitions of whom, how, and where we serve, based on a sound financial design. We will continue

to adhere to our mission in expanding programs, and will seek appropriate partners for new ventures. (See also Goal 7.)

    b. Explore contract options to offer moderate entry and monthly fees, based on documented market demand and the option of establishing an Entry Fee Assistance Fund to enable prospective residents of moderate means to consider moving to Kendal.

    c. Pursue options for use of recently acquired properties and those under contract adjacent to the campus to further our mission.

ii. Enhance Kendal's financial model:

    a. Evaluate Kendal's financial status by consistently tracking metrics such as occupancy, net operating margins, and other key benchmarks, pursuing improvements and grant opportunities, monitoring compliance with special funding requirements, and implementing best practices.

    b. Develop efficient strategies that support cost-effective operations – including moderating fee increases – by leveraging fixed costs over a broader base, using technology, and partnering with other entities.

iii. Increase Kendal's capacity for philanthropy through the following:

    a. Establish a more formalized program of philanthropy, such as a foundation that would support Kendal's mission and nonprofit status through internal and external grants.

    b. Formalize a fund-raising program to support Kendal at Oberlin, including planned giving and grants from external sources, as well as the potential for gifts to support current programs.

Goal 2: Improve and extend Kendal-associated health care to benefit current and expanded markets and adapt to a changing environment.

Five years ago, Kendal's goal for health and wellness featured a call "to begin by embracing change." Following the COVID-19 pandemic and policy shifts in health care, the community recognizes ever more clearly that it must not only embrace change but also thrive in a constantly changing environment. In the next five years, Kendal seeks to drive changes in its health and wellness programs even while responding to external factors, and in doing so to be more cognizant of and responsive to social determinants of health affecting the larger community.

Strategy A: *Continue to strengthen elder health, emphasizing support for living well with chronic illness through staffing, training, facilities, and IT modifications, always with an emphasis on person-centered care.*

Demographic trends are a major factor in planning for Kendal, and residents are familiar with issues that arise predictably late in life or at the end of life. In addressing these issues, it is important to continue to enhance programming, staffing, training, screening, self-management, and other measures that are person-centered and life-enriching and preserve the dignity of each resident. The various levels of dementia and other long-term afflictions require different programs and staff support.

i. Continue to strengthen the continuum of care provided by Kendal by exploring opportunities to:

    a. Reinforce the Health & Wellness Clinic as the lynchpin for all needs, able to connect residents with any services they need.

    b. Provide transitional care utilizing Kendal and Ohio Living teams.

        i. Assess cases of loneliness, isolation, resident-expressed spiritual needs, and depression on the Kendal campus and develop effective interventions as needed.

        ii. Establish Ohio Living Hospice to augment Kendal's continuum of care and address unmet needs in the greater community.

        iii. Grow the positive impact of Ohio Living Home Health and Hospice among residents and in the greater community. Increase focus on lifestyle and social determinants as factors affecting overall health, including economic stability, education, food, neighborhood and physical environment, community and social context, and health care systems.

    c. Provide education and clarity regarding successful aging, including which services can be provided in independent housing, effective self-management of residents' health, support in navigating health care service options, and assistance in making transitions between levels of care.

    d. Continue to improve/update exam, treatment, ancillary, and residential facilities to comply with model and emerging practices and current regulations and meet the demands of extending health care to the larger community.

ii. Continue to strengthen dementia care services throughout the continuum of care provided at Kendal at Oberlin, and preserve resident-defined quality of life by exploring opportunities to:

a. Empower staffing and resource levels to meet the continuum of dementia care needs of residents, especially independent living residents who live alone who are entering early-stage dementia.

b. Continue to evolve transitional care on campus by exploring how best to work with residents who decline care or support.

c. Take steps to stay at the forefront of dementia care through the use of emerging technology blended with one-on-one personal care and the engagement of trained volunteers.

d. Enhance campus facilities to provide safe and supportive spaces for residents living with various levels of dementia.

iii. Support individuals and families in the wider community dealing with dementia by exploring opportunities to:

a. Continue to build a dementia forum to discuss dementia with the greater community, ideally in partnership with another local organization.

b. Establish a Caregiver Respite Program that uses underutilized Stephens Care Center beds, staffing, and support for defined periods of respite time.

c. Partner with Kendal at Home and local hospitals to develop and operate a pilot dementia training and care program, recognizing that many older adults treated in emergency rooms have some level of dementia.

d. Partner with other organizations in the community, such as the Lorain County Metro Parks, to offer additional ways for Kendal residents and others to remain active as they age.

e. Contract via Ohio Living to provide local hospitals with follow-up dementia care planning and care coordination for area residents.

Strategy B: *Improve ties with hospital systems and other providers while holding down costs and building referrals.*

With a population of about 350 residents, Kendal at Oberlin is too small on its own to attract significant partnerships with the three major health care systems in the region. To do so, we need to reshape our efforts to form such relationships, and connect more directly with individuals and organizations outside the Kendal community.

i. Maintain and grow relationships with the Mercy, Cleveland Clinic, and University Hospitals systems and Northern Ohio Medical Specialties.

a. Continue to focus on Kendal's superior ranking and positive clinical outcomes for patients in the Stephens Care Center and the Health & Wellness Clinic, as well as excellent resident satisfaction scores.

b. Explore and create opportunities to enhance primary care physician coverage and availability for Kendal residents, including both in-person and telehealth services.

c. Consider the management staffing structure for the Health & Wellness Clinic, including leadership succession planning.

d. Evaluate and recommend changes in health care transportation options within Lorain County and into Cuyahoga County.

e. Operate an effective provider referral and evaluation process for residents, such as maximizing their access to therapy resources in the region to help address cognition issues at all levels of care.

f. Maintain a stable census in the Stephens Care Center by expanding relationships with referral and insurance networks.

ii. Establish Kendal at Oberlin as the region's leader in all areas of aging, including making progress on the creation of a Kendal Center for Geriatric Excellence.

a. Using the lessons of the COVID-19 pandemic, ensure that a robust Emergency Preparedness Plan for the campus is in place and is reviewed annually.

b. Expand and enhance the offerings of the Health & Wellness Clinic to serve greater Oberlin and southern Lorain County.

c. Contribute to community health by convening groups to ascertain priority elder health issues facing the region.

d. Expand the role of Kendal as a training site for students in health-related fields at schools and colleges in the region.

iii. Continue to explore how to refine electronic communications (medical records, telehealth, and data exchange) with the three hospital systems to improve the care experience, reduce costs, improve care coordination, and strengthen partnerships.

a. Working with our partners, identify and implement a medical records system that achieves interoperability, that will identify areas for improvement, and that will follow residents throughout the continuum of care. Continue to cooperate with The Kendal Corporation to identify a medical records approach for the entire Kendal System that will meet these criteria.

b. Strengthen health care emergency response technologies on campus, including wander management systems and emergency calls for assistance across the campus.

Strategy C: *Extend, when possible, Kendal-associated care to meet needs in the larger community and to spread fixed costs over a larger base.*

i. Based on data from a community needs assessment, expand and enhance the offerings of the Health & Wellness Clinic to address unmet needs in the larger community, including the city of Oberlin and southern Lorain County.

ii. Work with other organizations in the community to develop housing to meet the area's needs without further burdening the life plan community model that Kendal operates.

a. Relying in part on government assistance where possible, develop intergenerational housing and related services for moderate income older adults, including grandparents raising grandchildren.

b. Consider developing market-rate rental housing for moderate income older adults, with defined access to a set of Kendal services and wellness programming based on a needs analysis reflecting the area's social determinants of health.

iii. Share information with residents in Kendal's traditional life plan community program about how these community initiatives complement Kendal's mission and its commitment to the life plan community program.

Goal 3: Strengthen Kendal at Oberlin as a caring and competitive employer with the capacity to attract, retain, develop, engage, support, and advance the workforce it will need to respond to challenges and opportunities.

Kendal at Oberlin residents rely on and appreciate competent, caring employees who in turn desire a job in which they feel valued, respected, fulfilled, and appropriately compensated. An existing difficulty in recruiting and retaining employees in the senior living field reached new levels as the COVID-19 pandemic spurred wage competition for many entry level jobs. To continue as a model life plan community, Kendal must be an employer of choice by offering competitive wages, refining and expanding its recruitment and relationship-building efforts, helping employees to advance and grow, and fostering a community-wide culture that values care and respect.

Strategy A: *Develop nimble strategies and build adequate financial resources to successfully recruit and retain quality employees in an extremely competitive labor market.*

i. Track wage trends inside and outside of the senior living market and budget for market-competitive wages that meet living wages levels or greater as indicated by the labor market.

ii. Investigate and implement changes that will improve job attractiveness and employee satisfaction.

iii. Offer recruitment and retention incentives that are feasible and fair to both new and continuing employees.

iv. Have open conversations with and among the board, employees, and residents about workforce challenges and solutions, best practices, and benchmarks such as living wage.

v. Engage a benefits consultant to examine Kendal at Oberlin's benefits offerings and receive recommendations for cost-effective enhancements.

vi. Explore and pilot initiatives that could add value to employment at Kendal, such as transportation, housing, childcare, a suggestions program, wellness programs, food discounts, and expanding tuition assistance.

Strategy B: *Strengthen engagement with populations of prospective employees across demographic groups and throughout a wide geographic area.*

i. Raise awareness of career opportunities at the high school and college level through direct interaction, marketing, paid internships, and partnering with institutions with similar goals and needs.

ii. Work with Marketing, IT employees, department heads, and other employees to develop communication approaches to reach prospective employees and to communicate with current employees using multiple modes of communication, digital platforms, social media, and word-of-mouth recommendations.

iii. Build a culture and relationships that will attract persons of color, immigrants, under-represented groups, and others who will exemplify Kendal's Values.

iv. Augment successful internal advancement pipelines, promoting them to new and existing employees.

v. Utilize The Kendal Corporation resources and infrastructure to advance Kendal at Oberlin's initiatives and advocate for The Kendal Corporation to augment such assistance.

Strategy C: *Increase Kendal's focus on professional development for employees at all levels, recognizing the value of continuing education.*

i.   Encourage and enable employees to enroll in external programs (LCCC, LCJVS, webinars, etc.), as well as on-campus learning experiences, while still recognizing that learning preference and opportunities will vary.

ii. Maintain and strengthen ties with area schools and colleges preparing prospective employees for the senior living field.

iii. Create training built on Kendal Values for supervisors and team leaders to assure work teams within all departments are being coached and facilitated positively and trained to resolve conflicts in ways that promote understanding and respect – the Kendal way. Assure leaders are receiving all the support they need to be values-based role models to retain and to grow employees.

Strategy D: *Foster an environment in which all employees feel valued and fulfilled in their work.*

i.   Be cognizant of and implement improvements that reduce employee burnout, including adequate staffing, streamlined decision-making, employee empowerment, and recognition.

ii. Work jointly with employees and residents to foster familiarity, understanding, care, and community.

iii. Provide the tools and assistance employees need to do their jobs.

iv. Continually demonstrate gratitude for employees, formally and informally.

v.   Maintain a culture of teamwork, transparency, honesty, and open communication.

Goal 4: Assure Kendal at Oberlin is a community that demonstrates commitments to Diversity, Equity, and Inclusion[1] in its actions and its communications.

In this pursuit, we are guided by our alignment with Kendal's values and practices, welcoming all individuals and valuing the differences of each person while promoting mutual respect, acceptance, cooperation, and teamwork. Achieving this goal will engage the entire Kendal community as well as be in partnership with the larger community.

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[1] Diversity is the representation of various identities and differences. Equity focuses on fair treatment, equal opportunity and equal access to resources. Inclusion is the engagement of the contributions and participation of all people.

Inclusion is a vital priority for our community of residents and staff. It must be intrinsic to both the way we hire and educate staff and the manner in which we market Kendal at Oberlin to prospective residents. This work is intentional, planned, ongoing, and gradually transformative – an aspirational process involving leadership, education, programming, and conversations spanning the entire Kendal at Oberlin community. We believe in a diverse community where inclusion rather than "fit" is the guiding principle. Diversity, equity, and inclusion grow out of our Kendal values and practices.

Strategy A: *Provide ongoing education in Diversity, Equity, and Inclusion principles for staff and residents.*

i. Ground this strategy in Kendal's values and practices and make it clear that the community's leadership – board, CEO, senior administration, and KORA Council – accept and support this commitment.

ii. Pursue SAGE (advocating for LGBT Seniors) training and accreditation as one avenue to implementing this strategy.

iii. Plan to include DEI-related topics on agendas for staff and resident meetings and in publications directed to these groups and formalize opportunities for staff and residents to voice concerns about inappropriate behavior patterns.

iv. Partner with community organizations that focus on populations that are under-represented at Kendal.

Strategy B: *Promote awareness of Kendal's practices and messaging to ensure staff and residents understand this commitment to Diversity, Equity, and Inclusion.*

i. Make a leadership commitment that every staff member will have access to on-the-job training and education to qualify for new roles and opportunities.

ii. Focus on communication media that will reach diverse audiences with clear, effective messages.

iii. Focus recruitment messaging on demonstrating how and why Kendal is an attractive workplace for a diverse workforce at all levels.

iv. Reinforce these messages in orientation and ongoing communication for residents and staff members. A key element of our community is mutual respect between and among residents and staff.

Strategy C: *Increase accessibility, including affordability, in pursuing opportunities for new prospective residents, new program development, community partnerships, and access to Kendal amenities.*

i.   Ensure that Kendal's activities, facilities, and equipment are designed and maintained in ways that promote access by all.

ii.   Develop ways to ensure that spouses, partners, and other significant people in the lives of Stephens Care Center residents can connect with them while living apart for health reasons.

iii. Enter into partnerships with other organizations that can enhance the accessibility of Kendal's offerings for a wider audience with attention to the social determinants of health for the larger community.

iv.   Further strengthen transportation options for residents and introduce transportation assistance for staff commuting to work.

v.   Explore ways to make access to Kendal at Oberlin more affordable for those with limited resources, including considering establishment of an Entry Fee Assistance Fund.

Strategy D: *Strengthen outreach to the larger community to communicate that residents and staff are engaged in achieving Kendal at Oberlin goals in Diversity, Equity, and Inclusion.*

i.   Promote and support engagement by residents, staff, and board members in organizations serving the larger community.

ii.   Convene community leaders regularly to discuss shared concerns and opportunities.

iii. Invite representatives of the larger community to Kendal as often as possible to present information on their activities and concerns.

iv.   Use local vendors and contractors when possible, including minority- and women-owned firms.

Goal 5: Strengthen the role of technology in all facets of operation and the residential experience.

Technology has been incorporated into all aspects of the operations of Kendal at Oberlin and is used increasingly by staff, residents, and other community members. It benefits the organization in multiple ways by strengthening infrastructure, broadening the modes of communication, easing data-collection and sharing, supporting healthcare delivery and monitoring, increasing safety, and promoting workforce efficiency.

Kendal at Oberlin will need to make an adequate investment in technology to support the increased reliance on it. Careful evaluation of quality and utility should guide the organization in selecting technologies suitable to the needs and expectations of

residents, staff, and the community. Collaboration with the Kendal System will optimize the coordination of technologies considered/selected across the system and provide increased purchasing power.

Strategy A: *Maintain and strengthen Kendal at Oberlin's infrastructure to support operations and the increased role of technology throughout the campus.*

i.   Maintain and upgrade the network infrastructure to ensure scalability to meet current and future needs of the community including network security.

ii. Ensure campus-wide coverage of cable television and reliable high-bandwidth internet throughout the Kendal at Oberlin community, upgrading systems when needed, and explore future modes of communication/connectivity.

iii. Enhance AV capabilities in the auditorium and other public spaces.

iv. Evaluate and implement new technologies to improve/enhance efficiency throughout the campus.

   a. Enhance campus security with automated systems (e.g., door controls, security cameras, and other sensors).

   b. Promote health and infection control by pursuing advanced HVAC systems that provide clean and disinfected air in buildings.

   c. Monitor and decrease campus energy use by increased usage of LED lighting and high efficiency heating and cooling systems and by resident education programs. (See also Goal 6.)

   d. Support campus dining improvements through the increased use of technology, (e.g., kitchen robotics and automation).

   e. Reduce Kendal at Oberlin's carbon footprint by using technologies such as solar panels for generating electricity or heating water. (See also Goal 6.)

v.   Provide for maintenance of all campus technology, taking advantage of resident expertise where appropriate.

Strategy B: *Increase access to and the use of technology in communications, marketing, security, and other areas.*

i.   Help the Kendal at Oberlin community adapt to new technologies.

   a. Encourage widespread use of up-to-date technology to promote communication and social engagement, well-being, web-based education, and health.

b. Support the use of smart home and robotic assistive devices with the potential for voice activation/recognition, including education about privacy and data protection.

c. Provide accessible technology support and training to residents and staff with a wide range of skill and comfort with technology, using a combination of dedicated staff, outside resources, and skilled residents and by establishing collaborations/partnerships with colleges, trade schools, etc.

ii. Use information technology to broaden and accelerate the flow of information to and among current and potential community members and staff.

a. Enable increased resident engagement with an improved Residents' Association website to learn about schedules and programs, receive announcements, view and download current documents, make requests and reservations, use resident and staff directories, and keep up-to-date personal information.

b. Explore incorporating smart speakers into the community information system, enabling voice interactions and communications.

c. Enhance communication between staff and residents and within and between departments to increase the efficiency of information sharing and to enable virtual meetings, using a team collaboration software that integrates people, content, and tools.

d. Support virtual communication between independent living and Stephens Care Center residents, and between all residents, their families, and the wider community including mobile capabilities for hybrid communication.

iii. Continue digital marketing efforts to attract potential future residents.

a. Develop content on the Kendal at Oberlin website, social media channels, and other electronic communications.

b. Utilize digital advertising strategies, (e.g., Google and Facebook).

c. Implement the exclusive website for Priority List members with login access, which contains admissions materials, moving resources, and links to Kendal at Oberlin events and activities and the Residents' Association website.

d. Increase opportunities for hybrid communication for current and future residents (e.g., Lifelong Learning programs, Kendal at Oberlin community programs, virtual tours, and meetings).

    e.   Improve analytics to evaluate the effectiveness of marketing efforts.

iv. Protect the confidentiality, integrity and availability of data and systems of the Kendal at Oberlin community to prevent the loss of their assets and services from being disrupted, stolen, or exploited.

Strategy C: *Use technology to increase access to health resources, support resident health, and improve medical record keeping.*

i. Facilitate the use of telehealth to increase access to care and promote high-quality, comprehensive, continuous care.

    a.   Create dedicated and mobile telemedicine stations and provide staff support as needed.

ii. Take advantage of new technologies for health care (e.g., for monitoring chronic conditions and helping to manage dementia cases).

    a.   Explore the use of virtual reality, robotics, wearable devices, artificial intelligence, and other technologies with the potential to enhance health care and increase efficiency.

    b.   Utilize predictive analytics to increase resident safety (e.g., falls prevention, sleep patterns).

iii. Continue to work toward integrating medical information from different providers into an electronic health record to exchange clinical information and documents electronically. (See also Goal 2Biii)

Strategy D: *Support workforce recruitment, retention, and efficiency with technology.*

i. Explore marketing opportunities for employee recruitment through social media and hiring platforms (e.g., Facebook, LinkedIn, and Indeed).

ii. Promote Kendal at Oberlin to prospective workers as a technologically advanced organization.

iii. Evaluate and enhance employee engagement using online tools (e.g., WeCare Connect, Onshift).

iv. Increase employee efficiency and control labor costs by automating tasks where possible.

Goal 6: Greatly strengthen and extend Kendal at Oberlin's conservation and sustainability initiatives, including cost-saving measures and reductions in greenhouse gas emissions, consistent with the City of Oberlin's Climate Action Plan and recommendations from its Climate Adaptation Task Force.

The United Nations Secretary General called the August 2021 report of the Intergovernmental Panel on Climate Change "a code red for humanity." Climate scientists have concluded that carbon emissions must be reduced 50% by 2030 to achieve carbon neutrality by 2050. Failure to do so will almost certainly raise the global average temperature above 1.5C, ensuring far more catastrophic floods, downpours, droughts, fires, hurricanes, heat waves, acidified seas, and biodiversity loss than what has already occurred. The 2018 National Climate Assessment states that the first three types of disaster will particularly impact northeast Ohio.

Strategy A: *Strive for a significant reduction in Kendal at Oberlin's carbon emissions by 2030.*

i.   Calculate Kendal at Oberlin's annual carbon emissions to establish a baseline by which to measure future emissions cuts and conduct an energy audit through the City of Oberlin's Efficiency Smart program.

ii. Improve energy conservation on campus.

   a.   Develop a plan, using consultants if necessary, that: 1) Identifies the cheapest, most reliable and energy-efficient technologies to begin replacing gas-fired heating/cooling in the apartment building, Heiser, Stephens Care Center and the pool building, 2) Lays out the phasing of this transition and maintenance implications, and 3) Provides for more all electric and hybrid plug-in cars, buses, pickups, charging stations, battery-storage packs, and solar panels in garage rebuilds.

   b.   Adjust the capital budget to phase in those technologies.

   c.   Continue to replace Kendal at Oberlin mowers, trimmers, go-carts, and vans with electric models.

   d.   Continue to replace sodium light poles and bollards with LED fixtures.

Strategy B: *Implement changes that will make Kendal at Oberlin a more sustainable campus.*

i.   Increase carbon sequestration significantly through cultivation of a sustainable landscape, with those indigenous plants and trees best suited to Ohio's warming Midwestern climate.

     a. Increase shade and wind protection in selecting trees.

ii. For all new construction, create a storm water plan that includes techniques like permeable pavement, bioswales, and other ways to manage storm water.

iii. Decrease food waste beyond present composting through educational programs and increased awareness.

iv. Increase local and regional sources of food.

v. Continue to improve the campus, maintaining its walkability, its attractiveness, and its diverse population of plant and animal life.

Strategy C: *Act as an advocate, educator, and community partner for environment, energy, and climate issues.*

i. Continue to educate residents on sustainability/energy saving measures they can take.

ii. Partner with Oberlin College on opportunities to implement environmental solutions within and beyond Kendal at Oberlin.

iii. Partner with other Kendal affiliates and other like-minded organizations on environmental solutions within and beyond Kendal at Oberlin.

iv. Through appropriate venues, educate and inform residents about significant climate legislation at local, state, and federal levels.

v. Partner with the City of Oberlin and New Russia Township on environmental improvements and continue to encourage resident participation in various city council committees and commissions, the city's Education and Outreach Working Group, and the planning of walkways that connect Kendal at Oberlin and the larger community.

Goal 7: Promote Kendal at Oberlin's continued health and strength through growth and evolution within and beyond the existing campus.

Every institution seeking to remain viable must find ways to innovate, evolve, and grow. Such efforts are particularly essential for the health and strength of senior living organizations. The stand-alone single campus is no longer the default model for this industry.

Kendal at Oberlin, since its beginning, has been proactive with innovations to enhance the experience of Kendal's resident community as well as evolving to engage the greater senior population in new ways i.e., initiating Kendal at Home, and partnering with Ohio Senior Living. The challenge for Kendal at Oberlin in the next five years is to be alert to and prepare for new opportunities for partnerships, affiliations, acquisitions, and consolidations, while continuing to provide a state-of-the-art environment for its resident community.

Strategy A: *Cultivate a proactive culture of growth and evolution that is both fiscally sustainable and in keeping with Kendal at Oberlin's mission.*

i.   Develop within senior management and other key staff of Kendal at Oberlin support for a culture of growth/evolution opportunities consistent with Board objectives and priorities.

ii. Provide ongoing education for board members, committee members, staff, residents, and constituents concerning issues and trends within the senior living sector.

Strategy B: *Establish criteria for evaluating all future growth and expansion opportunities. Such criteria may include but are not limited to identified priority populations; revenue diversification to keep the core campus sustainable; development of new support sources; support of Kendal's mission; enhancing the brand; diversifying the populations served; positioning Kendal for future shifts in populations.*

i.   Identify specific populations to which Kendal at Oberlin could provide new or expanded services, facilities, access, and benefits.

ii. Utilize appropriate market research to support the viability of expansion to new populations and new programs.

Strategy C: *Develop a process and resources for expedient decision-making concerning opportunities for growth and evolution.*

i.   Establish a standing group to achieve and oversee the accomplishment of this strategic goal.

ii. Determine the resources needed to proactively seek and evaluate growth opportunities consistent with the established criteria.

iii. Develop funding strategies and management structures, such as SWOT readiness analysis capability, for quick response to growth opportunities.

iv. Collaborate with The Kendal Corporation and other Kendal Affiliates in considering shared forms of growth and evolution, such as through Affiliate Regionalization.

Strategy D: *Implement growth and evolution projects consistent with the criteria established in Strategy B.*

i. Prioritize and carry out projects for the current campus and adjacent properties in keeping with Kendal at Oberlin Master Plan, with consideration for but not limited to reinvestment, leveraging idle property assets, and disposition of property assets.

ii. Explore possible acquisition/affiliation to provide new or expanded facilities and/or programs to serve Kendal at Oberlin's present or new populations.

iii. Provide continued improvements and innovations in services and amenities for Kendal residents in areas of, but not limited to, dining, fitness, and social services.

APPENDICES

A. People

Kendal at Oberlin Strategic Planning Committee
Liz Schultz, *chair*, member of the Board of Directors
Gary Olin, *vice-chair*, resident, member of the Board of Directors
Nora Adelmann, Senior Vice President, Governance & Strategy of The Kendal Corporation
Dick Baznik, resident, member of the Board of Directors of The Kendal Corporation
Mary Behm, resident, president of KORA Council
Ann Fuller, resident, member of the Strategic Planning Subcommittee on Information Technology
Karen Kilgo, president and chief executive officer of Flat Rock Homes
Toni Merleno, director of HR & Operational Services at Kendal at Oberlin
Jack Southworth, treasurer of the Board of Directors
Barbara Thomas, chief executive officer of Kendal at Oberlin
Mary Van Nortwick, resident, Chair of the Lifelong Learning Committee
Joan Villarreal, chair of the Board of Directors

Drafting Teams
Front Matter: Nora Adelmann, Dick Baznik (leader), and Barbara Thomas
Goal 1: Nora Adelmann, Dick Baznik (leader), and Barbara Thomas; with comments from Jack Southworth
Goal 2: Dick Baznik (leader), Laurie Dupee, Anne Lockwood, Scott Moore, Beth Stewart, and Stacy Terrell
Goal 3: Barb Benjamin, Ann Francis, Karen Kilgo, Annette McIver, Toni Merleno, Liz Schultz (leader), and Beth Stewart
Goal 4: Donna Baznik, Elisabeth Christman, Monica Fuquay, Marita George, Elizabeth Hole, Thomas Konkoly, Monica Madera, Emma Mason, Sandi McClennen, and Barbara Thomas (leader)
Goal 5: Kelly Corcoran, Ann Fuller (leader), Judy Miller, Bruce Richards; with feedback from the Strategic Planning Subcommittee on Information Technology, department heads, and Dick Baznik, Mary Behm, Linda Grashoff, Sally Nelson-Olin, and Tom Taylor
Goal 6: Linda Arbogast, Mary Behm, Rey Carrion, Mary Van Nortwick (leader), and Ted Wolner (lead writer)
Goal 7: Liz Burgess, Ruth Ann Clark, Terry Kovach, Frank Mandy, Gary Olin (leader), Ann O'Malley, Liz Schultz, Jack Southworth, Dan Storer, and Tracy Sutherland

Financial Plan Team: Rey Carrion, Ann O'Malley, Judy Miller, Ryan Stalzkowski, Barbara Thomas; Committees: Campus Planning, Master Planning, Strategic Planning; The Kendal Corporation

Resident Volunteer Facilitators for Strategic Planning Meetings
(In addition to committee members, drafting team participants, and board members)

Barbara Barna	Tina Graf	Sally Nelson-Olin
Ruth Ann Clark	Bob Longsworth	Anne Palmer
Ann Francis	Charlotte McGowan	Randy Wagner

Community Engagement Meetings Participants

Ambar, Carmen	President, Oberlin College
Bracken, Jennifer	Asst. Director, Lorain County Metroparks
Carlin, Judith	Exec. Director, Lorain Metropolitan Housing
Carrion, Maria	Director, Community Development, HUD
Flood, Margie	Exec. Director, Oberlin Community Services
Foss, Alicia	President & CEO, Neighborhood Alliance
Harr, Janet	Exec. Director, Oberlin Business Partnership
Hill, David	Pastor, First Church in Oberlin, U.C.C.
Hillard, Rob	Oberlin City Manager
Mack, Josh	President, Mack & Sons
Meadows, Elizabeth	Oberlin City Council Member
Paul, Curt	Sr VP, B Riley Wealth Management
Perales, Kathryn	Attorney, Perales Law
Peterson, Kristin	Oberlin City Council Member
Pilacky, Kate	Assoc. Dir., Western Reserve Land Conservancy
Potts, Ralph	General Manager, Oberlin Cable Co-Op
Saunders, Erica	Pastor, Peace Community Church
Shrewsbury, Jay	Operations Manager, Oberlin Cable Co-Op
Slocum, Linda	Oberlin City Council Member
Wray, Charlotte	President, Mercy Health Allen Hospital

B. Economic and Demographic Trends

The trends and issues below were identified by members of the Strategic Planning Committee and residents early in the information gathering process and helped shape research, discussions, surveys, goals, and strategies.

COVID-19 Impact

The COVID-19 pandemic will have a significant impact on senior living communities well into and probably beyond the five-year horizon of this plan, including immediate health care concerns, available resources for new initiatives, staff shortages, isolation and mental health, reliance on a robust internet infrastructure, interest in telemedicine, and market perceptions of life plan communities.

Culture of Kendal at Oberlin

Residents and staff chose to live or work at Kendal at Oberlin in large part because of its culture, which is distinctive among senior living communities. Over time that culture has evolved, and will continue to do so, as new waves of residents and staff join. Internally, we must maintain the strong commitment to Kendal Values, continue forward-looking financial management, sustain resident leadership and input, and foster mutual support and engagement. Externally, we must continue to advocate issues that affect our field and community.

Health and Wellness

Health services are seldom the primary reason prospective residents select a senior living community, but ultimately become a major factor in their satisfaction. During the planning process residents expressed concern about limited access to physicians, navigating the complex health care system, loneliness and mental health needs, integrating technological improvements in health care, wellness and prevention initiatives, and facilities updates that are necessary in the present and for future markets.

Workforce

The unprecedented competition for caring employees, the safety policies necessitated by the pandemic, and resulting stress of burnout led to extreme workforce challenges. Kendal at Oberlin must consider several solutions to these needs, including building the resources to remain a competitive and caring employer, leveraging advances in technology, collaborating to cultivate future employees, valuing and seeking diversity, and continuing to provide advancement opportunities and appreciation for current employees.

Diversity, Equity, and Inclusion

Organizations need a clearly stated plan for Diversity, Equity and Inclusion to attract and foster workforce talent and a more inclusive resident population. This requires ongoing training, individual commitment at all levels of the organization, new initiatives and investments, and potentially new markets.

Information Technology

Senior living communities need to make forward-looking investments in information technology for sales and marketing, to reduce paperwork burdens and improve worker efficiency, and to allow older adults to self-manage more of their care and services. Priorities must also include infrastructure improvements and easily accessible assistance with new technologies.

Environment, Energy, and Climate

Climate change is an overriding concern at Kendal and beyond, resulting in strategies to reduce carbon emissions, invest in electric solutions, improve energy conservation, increase carbon sequestration, and work with advocacy and action partners.

Affordability

Income disparity is growing and there are even more significant gaps in household wealth between different racial groups and generations looking to retire. There are initiatives to reduce these disparities at the national level but Kendal at Oberlin can also commit to exploring ways it can keep the life plan community affordable into the future and make other services available to more community members.

Growth and Evolution

Growth and evolution are essential for the continued health and strength of senior living organizations. The stand-alone community is no longer the default model for this growth and Kendal at Oberlin should prepare models, evaluation criteria, and resources to position itself for opportunities that strengthen its existing core services, achieve strategic initiatives, and anticipate future markets.

C. The Strategic Planning Process

Kendal's board of directors launched the planning process in February of 2021 with the formation of a twelve-member strategic planning committee. The committee knew the planning process would require more creativity and flexibility given the inability to host in-person gatherings, but it we feel there was still ample opportunity for participation. From April through September of 2021, nearly 300 people participated in a series of information gathering activities. (182 residents respondent responded to a survey, 121 residents participated in live engagement meetings held via Zoom, 23 residents submitted written comments in lieu of the Zoom meetings, 20 staff members participated in focused engagement meetings, 20 board members participated in multiple discussions, and 20 community representatives participated in virtual forums)

Major phases of the planning process included:

Research and Coordination (spring 2021). The committee met via Zoom to discuss the major trends impacting the senior living field in general and Kendal at Oberlin in particular. This resulted in a four page "Trends and Issues for Planning" document that that continued to be refined as feedback began to come in from residents. These trends and early feedback formed the framework of the new goal structure. The committee also spent a considerable amount of time brainstorming how to safely gather feedback from and communicate planning progress with residents, staff members, and community members in the midst of the COVID-19 pandemic.

Information Gathering (May – September). Several methods of engagement were used to solicit comments from various constituencies, all of which were held virtually unless otherwise noted. Many thinks go the facilitators, notetakers, and transcribers who volunteered throughout these activities.:

- A digital survey with ten questions sent to all residents. Paper copies were also made available. (182 responses)
- Two "Shaping our Future" resident engagement meetings were held via Zoom and participants were broken into smaller breakout rooms for better conversation. (approximately 104 residents [there could have been more than one person per Zoom registration]). Paper copies were also made available.
- Two staff engagement meetings were held via Zoom, which were largely attended by leadership team members. (approximately 20 participants)
- The Kendal at Oberlin board spent the "generative discussion" portion of the regularly scheduled July meeting in an "Opportunities and Threats" brainstorming session.
- KORA Council participated in a planning meeting.
- A focus group meeting was held with new residents.
- Two meetings were held with community members (approximately 45 people were invited and 20 were able to attend).

Key findings and major themes were shared with residents at Afternoon Exchange meetings, KORA meetings, and in the monthly newsletter.

Compilation and Drafting (summer and fall 2021). Committee members were continuously compiling and summarizing feedback after each information gathering activity. Raw and summarized data were shared with committee members and summaries were shared with board members and other interested parties. The "Trends" document was modified based on newly received information and the core areas identified formed the basis of seven drafting teams.

Drafting teams were each led by a member from the strategic planning committee and were composed of a mix of residents, staff members, board members, and subject

experts who could best address the areas of focus for each goal. Each team submitted draft goals in the fall of 2021 which were then compiled, formatted, and edited for overlap, cross-referencing, and language consistency. Committee members and drafting teams were then invited to review the newly compiled plan and submit another round of edits. After review, the planning committee submitted a draft of the new strategic plan in the meeting book for the January 18, 2022 board meeting and members were invited to share initial thoughts and suggestions both at the meeting and afterward. The planning committee met in February 2022 to review final edits.

[The following three paragraphs are draft, pending board approval and edits.]

Submission to the board (spring 2022). The Strategic Planning Committee submitted a final version of the plan for discussion and approval at the March 15, 2022 board meeting and it was approved with the understanding that financial modeling was still in progress.

Implementation and monitoring (through 2026). The final approved plan will be distributed to residents, staff, community planning participants and other constituents. Staff and board members will identify groups and individuals to take responsibility for each of the strategies and initiatives. A process and timeline for developing a long-range financial plan that will support the Strategic Plan is underway with the expectation that it will be finalized by July of 2022.

The Strategic Planning Committee determined a meeting and evaluation schedule to track goal progress and report updates and recommendations to the board as appropriate.

D. Organizational Profile

Development of Kendal at Oberlin

In January 1987, more than six years before Kendal at Oberlin opened, a number of Oberlin residents gathered to discuss an issue facing the community: aging but independent Oberlin residents had no local options when they no longer wanted to care for their own homes but wanted to remain in the town they loved. They resolved to do something about it, and formed a group to explore possibilities.

Through personal contacts they found themselves in discussion with the Kendal Communities, a Quaker-affiliated organization outside Philadelphia. At the time Kendal had only two communities, Kendal Longwood and Crosslands, both located near Philadelphia, but the Oberlinians were impressed by what they saw. While the Kendal

Communities leadership was initially somewhat reluctant to engage with them, the relationship grew and before long the Oberlin group was working its way along a path that could lead to development of a continuing care retirement community in northern Ohio. That path was long and arduous, but Kendal's guidance and assistance were crucial. Critical pieces of that early work included:

- Defining the kind of community to be developed.
- Negotiating a relationship with the Kendal Communities.
- Assembling suitable property.
- Designing the campus.
- Raising the necessary funding.
- Soliciting interest among – and deposits from – prospective residents.
- Recruiting local leadership.

In addition to help from the Kendal Communities, the local planners received considerable assistance from Oberlin College, the city of Oberlin, Lorain County, and area foundations. The planning group converted itself into a board of trustees (now board of directors), with members drawn from the community and including many who had been involved in the project from its inception.

Construction finally began in 1991 and was completed in fall 1993, when the first 185 residents moved in. Known as "Founders," these early residents did much to establish the tone and style of the community. Five of these "Founders" still live at Kendal. In cooperation with the Kendal Communities, the Oberlin board in 1992 hired Barbara W. Thomas, formerly of Cleveland's Judson Park retirement community, to serve as Kendal at Oberlin's executive director. Now identified as chief executive officer, she is completing her 30th year at Kendal at Oberlin as this plan is finalized.

The Kendal campus of about 110 acres includes a number of protected wetland areas. There are 175 cottages and 48 apartments for residents living independently, plus memory care, assisted living, and skilled nursing rooms in the Stephens Care Center for residents needing more help. A systematic program of remodeling and renewal is designed to keep these living spaces fresh. The Heiser Community Center features common areas for administration, dining, health and wellness services, art, crafts and other activities, meeting rooms, the Resale Shop, and the Kendal Early Learning Center. Starting in 2015, residents and staff launched the John Bartram Arboretum, a campus-wide designation for the Kendal grounds that highlights the 1,100 trees, eight ponds, and other notable features of the campus.

The 13 affiliates of The Kendal Corporation (the name assumed by the former Kendal Communities in the early 1990s) have much in common, though each has unique

characteristics as well. Kendal at Oberlin, the first affiliate established outside the northeast region of the country, has distinguished itself in several ways, including its creativity in developing innovative responses to needs and opportunities. The most notable of these include creation of Kendal at Home in 2004, which serves members choosing to remain in their own homes, and a partnership with Ohio Living (previously known as Ohio Presbyterian Retirement Services) which provides at-home care and service for members and others in the region. Today, Kendal at Home is an independent affiliate under The Kendal Corporation rapidly expanding its home membership.

Resident Profile

About 40% of current residents are from Northeastern Ohio, designated as Kendal at Oberlin's the Primary Market Area (PMA), and 50% are from outside Ohio. In total, residents have moved to Kendal at Oberlin from 37 states and the District of Columbia. Kendal at Oberlin has a larger geographic draw and a higher proportion of people relocating into the market area than is typically observed on a national basis for life plan communities. It is a "destination community" that, unlike most life plan communities, attracts residents from a wide geographic area.

Due to the proximity of Oberlin College, approximately 41% of residents have some affiliation with the College (alumni and former staff or faculty, or family connection).

The information below is representative of residents under contract as of 12/24/2021.

Gender (contracted residents only):

    Male (35%) 116
    Female (65%) 215
    Total 331

Household composition: Among occupied cottages and apartments, 34% (76) are occupied by couples/co-occupants. In addition, there are 4 couples/co-occupants where both reside in the Stephens Care Center.

Age of residents: Kendal at Oberlin has a younger resident group than many other life plan communities, with 20.1% of current independent living residents having moved while in their 60s.

    Average age at joining the community .... 74.4 years
    Median age of community residents................................ 82.3 years
    Average age of community residents............................... 82.8 years

Description of Management and Staff

Through 2021, Kendal at Oberlin had 164.98 FTE (full-time equivalent) employees, representing some 211 staff members. About 61% were full time, and 39% had part-time or PRN positions. The departments of Dining Services and Health Services employed the majority of part-time workers, since these departments serve a large number of residents over seven days and cover two to three shifts per day. The vast majority (83%) of staff reside in Lorain County, with the largest numbers coming from the following communities:

> Oberlin (27%)
> Elyria (16%)
> Wellington (10%)
> Lorain (9%)
> Wakeman (8%)
> Amherst/S. Amherst (7%)

During extreme weather conditions, we have had great success in staff being able to be at work due to their local residency. This is particularly true for the Dining Services department, which employs area high school students. Staff with unique training and management experience often come from more distant locations and other counties, but travel less than 50 miles one way. Easy access to Oberlin via the freeways extends our ability to recruit from greater distances. Lorain County newspapers are used for recruitment, but occasionally our recruitment ads extend into three adjacent counties, Cuyahoga, Huron and Erie.

Our ability to attract local Oberlin residents for staff positions is moderately successful. They generally serve in Facility Services, Housekeeping, Dining Services, Health Services and Administration. We have several Oberlin College students who have worked in Creative Arts Therapy under the Federal Work/Study Program. Multicultural statistics have been tracked since opening. At the time of opening, 13% of the staff came from diverse backgrounds. As of 2021, the diversity percentage averaged 17%.

In-house training is emphasized, with the implementation in 2011 of a staff education plan that ensures that staff members are both competent and caring. Topics range from regulations to sessions dealing with aging, dementia, health, safety, leadership, and personal enrichment. Some sessions are required, while others are optional.

Emphasis on continuing education and personal development is an important aspect of our Values and Practices. Since its second year of operation, Kendal at Oberlin has offered a tuition assistance plan to assist staff with furthering their education. The fund was increased in our third year of operation (1996), and the tuition dollar limit per staff

member was increased. The number of staff who has taken advantage of the program has varied each year. In most years we have had up to 10 staff members benefiting from tuition assistance. In 2003 we approved a fully paid scholarship, including books and supplies, to support a resident assistant (STNA) to become an LPN, then added another scholarship in 2004 to support a Dining wait staff member to become an RN. In 2015 the Board funded an additional professional development fund to support employee enrollment in programs designed to promote their advancement.

Our Kendal Early Learning Center teachers are receiving tuition grants to achieve their bachelor's degrees in early childhood education with online courses. In 2011, we received a sizeable gift to support scholarships for KELC children from needy families. In 2021, our Committee on Philanthropy recommended to the Board of Directors an enhanced fund to assure annual scholarships for families in financial need. This funding was approved enthusiastically by the Board.

Career advancement is an important aspect of staff satisfaction. Promotion from within Kendal at Oberlin is considered when filling any opening. Jobs are posted to ensure awareness. There have been a number of staff members promoted into new positions offering greater pay in the areas of hospitality supervisors, facility managers, and restorative nursing assistants. In all areas, department heads and supervisors are expected to assist staff in developing career paths. Since 2002, staff have participated in the Performance Management Partnership program as part of the annual process to set individual goals and performance standards tied to Kendal's overall goals. This program allows staff members and their supervisors to agree on performance plans each year.

Staff Profile. Kendal at Oberlin's workforce includes almost 165 full-time equivalent (FTE) staff positions, distributed as follows:

Administration	27.24
Facility Services	24.83
Hospitality Services:	
Dining staff	37.69
Housekeeping/Laundry staff	19.82
Health Services	55.40
Total FTE positions	164.98

Major staff departments include:

Administration includes the chief executive officer, chief health services officer, chief financial officer, receptionists, admissions/marketing, finance, early learning center, and human resources staff.

Facility Services includes staff in the areas of maintenance, night security, grounds, and transportation.

Hospitality Services includes cooks, assistant cooks, baker, line servers, utility, wait servers, housekeepers, and laundry staff.

Health Services includes all staff in nursing, activities, Health & Wellness Clinic, fitness center, rehabilitation (therapy services), and social services associates.

Governance of Kendal at Oberlin

Kendal at Oberlin is affiliated with The Kendal Corporation through bylaw requirements, as specified in an affiliation agreement that is updated periodically. Per the affiliation agreement currently in place, The Kendal Corporation must approve:

- The election of board members of Kendal at Oberlin; (Soon to change)
- Amendments to the articles of incorporation and specific sections of the bylaws of Kendal at Oberlin, as well as the incurrence of debt of specified value;
- Changes in corporate purpose;
- Use of the name "Kendal";
- The substance of resident contracts;
- The purchase, sale, lease, or other disposition of any real estate or improvements thereon over a specific value; and
- Dissolution, merger with another entity, division, or acquiring control of another entity.

The Kendal at Oberlin bylaws also specify that the President of The Kendal Corporation, or his/her designee, shall be invited to attend Kendal at Oberlin Board meetings *ex officio*.

Kendal at Oberlin's Board of Directors may have up to twenty members, no more than 20% of whom may be residents. Members are elected for a maximum of three consecutive three-year terms, staggered to ensure continuity. Resident board members may be elected for a maximum two consecutive three-year terms.

The Kendal at Oberlin organization and operating function has two principal elements. The first of these has a governance orientation, and the second a community life orientation. These are not mutually exclusive, but the various organizational and operational entities of the community are concerned with the two sets of issues in different ways and to varying degrees.

Governance has its roots in the agreement between each resident and Kendal at Oberlin. This agreement defines the services Kendal promises each resident and the obligations of each resident in return for those services.

The key players in the governance structure are the individual resident, the Kendal at Oberlin Board of Directors, and the Kendal at Oberlin staff. The Kendal Corporation and its corporate staff play a more general supporting role. In January 1999, The Kendal Corporation affirmed a federal-type governance system that features a combination of autonomy, shared purpose, and mutual accountability. On a day-to-day basis, Kendal at Oberlin staff play the major role because the staff has been given responsibility for ongoing operational and managerial tasks. The Kendal Corporation Board and the Kendal at Oberlin Board of Directors have responsibility for setting appropriate goals, values, standards, policies, and quality controls within which the staff is expected to operate and for which it is held accountable.

Residents assume a major role in forming the community-life activities. Community life has its roots in resident activity, interests, and community spirit. It has to do with resident interactions and the establishment of friendly and caring interpersonal and community-wide environments. The key players in the community life structure are the residents as individuals and in community, the Kendal at Oberlin staff, and the Kendal at Oberlin Residents Association (KORA). The Kendal at Oberlin Board of Directors, along with The Kendal Corporation, play supporting roles.

As a charitable nonprofit organization, Kendal at Oberlin is engaged in outreach to the surrounding community. Since 2016, that activity has been administered through Kendal Northern Ohio, a nonprofit charitable subsidiary of Kendal at Oberlin. Among its other activities, KNO serves as the fiscal agent for Oberlin's Community Land Trust and has also purchased the College Village apartment complex, located adjacent to the Kendal campus. Both of these activities are designed to increase or maintain the supply of affordable housing in the city.