

# PhilanthropyReport

2015

KENDAL~CROSSLANDS

*Communities*

*Together, transforming the experience of aging.®*



An annual report on Kendal-Crosslands Communities charitable giving.



Dear Friends,

Kendal-Crosslands Communities is proud to present this report on our philanthropic activities this past year. You will learn more about the various funds benefiting our communities and what we were able to accomplish thanks to the generosity of our residents, future residents, friends, and staff.

Thank you to everyone who supported Kendal-Crosslands Communities between January 1 and December 31, 2015. Charitable giving totaled \$1,314,126 with 504 gifts from 386 households. Gifts arrived through checks, credit cards, employee payroll deductions, charitable gift annuities, and bequests.

This banner year for gifts is the result of some very generous bequests from former residents. You will hear more throughout this year, but we have some exciting plans for improving Kendal-Crosslands Communities through the power of philanthropy. Unrestricted bequest gifts will be used to help with upcoming capital improvements to benefit our campuses.

Philanthropy is part of what makes Kendal-Crosslands Communities such a great place to live and work. Thank you again to all who gave so generously this past year.

Sincerely,

The 2015 Kendal-Crosslands Communities Philanthropy Committee

Stephanie Cory

Phil DeBaun

Rex du Pont

Kay Edstene

Beverly Grove

Harry Hammond

Sally Harrison

Crawford McKeand

Dee Nelson

**KCC Charitable Funds** **Balance as of 12/31/15**

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|   |                    |
|---|--------------------|
| <b>Crosslands Reserve Fund</b>  | <b>\$5,613,297</b> |
| <b>Kendal Reserve Fund</b>  | <b>\$4,943,144</b> |
| <b>Board-Designated Unrestricted Fund</b>                                     | <b>\$3,711,679</b> |
| <b>Anne Perry Fund</b>  | <b>\$362,979</b>   |
| <b>Robert N. and Lenora C. Zearfoss Fund for<br/>Crosslands Staff Support</b> | <b>\$299,739</b>   |
| <b>Louise P. Mullestein Scholarship Fund</b>                                  | <b>\$187,633</b>   |
| <b>Helping Hands Fund</b>   | <b>\$102,521</b>   |
| <b>A. E. du Pont Kendal Staff Support Fund</b>                                | <b>\$55,144</b>    |
| <b>Environmental Stewardship Fund</b>   | <b>\$20,962</b>    |
| <b>Kendal-Crosslands Entry Fee Assistance Fund</b>                            | <b>\$13,610</b>    |
| <b>Arboretum Fund</b>   | <b>\$12,628</b>    |

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One hundred percent of gifts to Kendal-Crosslands Communities' funds directly benefit the funds. No fundraising expenses are charged against gifts. All funds are invested with Wilmington Trust and accounted for separately.

The official registration and financial information of Kendal-Crosslands Communities may be obtained from the Pennsylvania Department of State by calling toll free within Pennsylvania, 1-800-732-0999. Registration does not imply endorsement. Kendal-Crosslands Communities is a 501(c)(3) nonprofit organization — contributions to which are tax deductible to the full extent of the law.



# Resident Assistance

## **Crosslands Reserve Fund**

This fund provides financial assistance to current Crosslands residents who cannot afford their full monthly fees. Fourteen households received assistance with their fees totaling \$424,268. Donations to the Crosslands Reserve Fund totaled \$102,495.

## **Kendal Reserve Fund**

This fund provides financial assistance to current Kendal residents who cannot afford their full monthly fees. Fourteen households received assistance with their fees totaling \$364,220. Donations to the Kendal Reserve Fund totaled \$131,332.

## **Kendal-Crosslands Entry Fee Assistance Fund**

This fund helps new Kendal-Crosslands Communities residents with their entry fees. Preference is given to new residents who have led a life of service, such as a career in social service, education, or religious work. On average, one new resident is assisted each year. This past year, however, no funds were expended. Donations to the Entry Fee Assistance Fund totaled \$3,775.





# Staff Support

## **A. & E. du Pont Kendal Staff Support Fund**

This fund, named in memory of former Kendal residents Averell and Edmond du Pont, helps Kendal staff who need financial assistance by providing emergency funds. Funds are dispersed for immediate needs such as making an unexpected bill payment. Seven Kendal staff members benefitted from grants totaling \$3,663. The fund received \$4,459 in donations.

## **Louise P. Mullestein Scholarship Fund**

Coniston resident William “Whitey” Mullestein established this fund in memory of his wife Louise to show appreciation for the care she received in the Crosslands health center. This fund helps staff cover the cost of enrolling their children in Kendal-Crosslands Communities’ onsite child development center. Financial assistance is provided to staff with demonstrated need. Four staff members received assistance through the fund totaling \$9,987. The fund received \$1,350 in donations.

## **Anne Perry Fund**

Former Kendal resident Anne Perry’s husband Eugene created this fund to provide scholarships and summer employment to deserving high school and college students. Students are chosen based on academic merit and financial need. Preference is given to students with a connection to Kendal-Crosslands Communities, such as a parent who is an employee. Students receive a cash award for educational expenses and a summer job. Each student receiving an award is matched to an appropriate job based on skills and interests. Four students received grants from the fund this year totaling \$8,392. The fund received \$1,150 in donations.

## **Robert N. and Lenora C. Zearfoss Fund for Crosslands Staff Support**

Crosslands resident Bob Zearfoss created this fund in appreciation of the care his wife Lenora received in the Crosslands health center. This fund covers costs associated with staff development, continuing education, and staff emergency needs. Six Crosslands staff members received a total of \$6,555 in support from this fund. Donations for the year totaled \$4,250.



## Other Purposes

### **Arboretum Fund**

The Kendal Crosslands Arboretum includes hundreds of mature trees that add great beauty to both campuses. This fund covers the costs of developing the Arboretum's programs, projects, and education, as well as the acquisition and maintenance of specimen trees. Gifts of \$500 or more to this fund offer the opportunity to name a tree in honor or memory of a loved one. The fund spent \$7,297 on specimen trees and related expenses this past year. Donations received totaled \$12,375.

### **Environmental Stewardship Fund**

This fund supports sustainability initiatives to provide conscientious and environmentally responsible stewardship of Kendal-Crosslands Communities' resources. No special projects were funded this past year. Donations to the fund totaled \$7,975.

### **Helping Hands Fund**

Helping Hands is an outreach program that provides biweekly housekeeping services to lower-income seniors in Southern Chester County. It grew out of a collaboration between Kendal-Crosslands Communities and the Kennett Area Senior Center to identify the most pressing needs of lower-income seniors in the area. Helping Hands served 43 clients this past year.

The program is staffed by one full-time Kendal housekeeper with help from an additional two. Clients must be at least 50 years old, though many are considerably older, and have an annual income below \$25,499. Clients pay for the services on a sliding scale, which begins at \$5 per hour. Fees charged to clients cover approximately one quarter of the total program cost. Donations to the Helping Hands Fund totaled \$16,900, and direct expenses for the program were approximately \$40,000. Because of the Kendal-Crosslands Communities Board of Directors' commitment to Helping Hands, the difference was offset through unrestricted gifts.

### **Unrestricted Gifts**

Unrestricted gifts allow the Kendal-Crosslands Communities Board of Directors to direct resources to where they are most needed. This includes supplementing funding for Helping Hands. Unrestricted gifts totaled \$564,394.

# Giving to Kendal-Crosslands Communities

All gifts are important to Kendal-Crosslands Communities, regardless of their size or method.

- Make an outright gift using cash, check, or credit card. You can see the results of your generosity immediately. Recurring giving options are now available. You can make a monthly gift using a credit card or, if you are a resident, by adding a gift to your monthly fee payment.
- Remember us in your will. You can also designate Kendal-Crosslands Communities as the beneficiary of a life insurance policy or your retirement assets.
- Be creative with your giving. Gifts of securities can provide tremendous benefit to Kendal-Crosslands Communities and possibly significant tax savings for you.
- Earn income for life for you or a loved one through a charitable gift annuity that will also benefit Kendal-Crosslands Communities.

## How to Make a Gift

Gifts to Kendal-Crosslands Communities can be made online at [www.kcc.kendal.org](http://www.kcc.kendal.org). Gifts can also be made by check payable to Kendal-Crosslands Communities and mailed to P. O. Box 100, Kennett Square, PA 19348 or delivered to the front reception desks at Crosslands or Kendal at Longwood.

## Learn More

We would be happy to discuss ways for you to make a gift to Kendal-Crosslands Communities that can help you meet your charitable and financial planning goals. For more information, please contact Stephanie Cory, Director of Philanthropy, at (610) 388-5528 or [scory@kal.kendal.org](mailto:scory@kal.kendal.org).



# 2015 Donors

*Kendal-Crosslands Communities gratefully acknowledges the following donors for their generosity.*

## **Coniston and Cartmel Residents**

Duncan and Fiona Allison  
Anonymous (4)  
Neil and Betsey Cullen  
Dr. and Mrs. McIver Edwards  
Bob and Sylvia Evans  
Gregory and Nancy Fasic  
Dr. and Mrs. George W. Franz  
Katharine D. Gregory  
Joan and Fritz Hinz  
Loretta Knight  
Peter and Miriam Kroon  
Daniel Mahoney  
Jean and Jack McClelland  
Renee Overholser  
Liz and Ferd Thun  
Janet H. Waddell  
Sam and Wynne Wharry  
John Williams

## **Crosslands Residents**

Anonymous (12)  
Harry and Betty Armitage  
Elizabeth Bainbridge  
Louise Bair  
Barbara Gilpin Beddall  
Yvonne and Herbert Blades  
Richard and Barbara Blanchard  
Emily Carol Bossert  
Ben Cohen  
Esther L. Cooperman  
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Fanny Cracknell  
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Del and Sally Tweedie  
Richard Voldstad  
Barbara Yeatman

## **Kendal at Longwood Residents**

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Imogene Angell  
Susan Angry  
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Allan and Peggy Brick  
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William Ravdin  
Catherine "Kitty" Smith  
Douglas Whyte

*Donors listed include those who made contributions between January 1 and December 31, 2015. We are deeply grateful to our donors, and we make every effort to be accurate and complete when acknowledging their generosity. Please call (610) 388-5528 to report any errors or omissions.*

# Memorial and Tribute Gifts

Listed below are gifts received in honor or memory of those our donors treasure or to recognize a special occasion. Any gift to Kendal-Crosslands Communities can be made in someone's name. Simply indicate such when you make a gift.

**In memory of Arece L. Anderson**  
Carol L. Anderson

**In memory of Imogene Angell**  
John and Emily Nahat Angell  
David and Barbara Marquez  
Ginsburg  
Terry Goode

**In memory of Leonora Bruehlman**  
Ronald and Janet Bruehlman  
Alva Calvin  
Thomas and Andrea Kinsley

**In memory of Dudley Campbell**  
Rosalind H. Campbell

**In memory of William H. Clark**  
Rosemary Clark

**In honor of Stephanie Cory and Jeff Gorris's Wedding**  
JR and Gina Bell  
Fred and Martha Gorris  
Melissa Gorris  
Kelli Maddy  
Linda Maddy

**In honor of Susanna Davison**  
Irene Saxman

**In memory of Robert Francis Dunn**  
Margaret S. Dunn

**In honor of Mary Lou Ford**  
Meg Ford

**In honor of Sally French**  
Holger Nissen

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F. Russell Wolf

**In memory of Edward Gregory**  
Katharine D. Gregory

**In memory of Alan and Margot Hunt**  
Bruce Everett Hunt  
David Hunt

**In memory of Bob Kendall**  
Dale Kendall

**In memory of Elsie Landstrom**  
Sara Betts  
Martha Corneel  
Elizabeth Lehmann  
Elizabeth Schaffer

**In memory of Lloyd Lewis**  
Barbara Parsons

**In memory of FM Mooberry**  
Mary Myers

**In memory of FM Mooberry and Mary Rankin Zalon**  
David Feldman

**In memory of Francis X. O'Sullivan**  
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Brian Covell  
Elmar Harry and Maruta Jancis  
Dorothy Mullestein  
Edward and Martha Mulligan  
Anthony and Isabel Olmsted  
John and Suzanne Pusey  
Douglas and Elizabeth Ann  
Sweet

**In memory of Trudi Oettgen**  
Herbert Oettgen

**In memory of Our Parents**  
Charles and Linda Reinhardt

**In memory of Walter and Eleanor Painter**  
Mr. and Mrs. Carl Painter

**In memory of Donald Pusey**  
Anonymous  
Susanna Davison  
Louis and Eleanor Hayes  
Dorothy Mullestein  
David Pusey  
Mary Lou Thomas  
Pat Vanderkraats

**In memory of Peter Robinson**  
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**In memory of Jack Rudden**  
Anonymous

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Mary Gallagher  
Wendell and Marilyn Lofland

**In memory of Allan Charles Rusten**  
Muriel Rusten

**In memory of Dorothy Schonhans**  
Kathleen Keane  
Christine Waisanen

**In memory of David Stevens**  
Deanne Stevens

**In memory of Jack Styer**  
Elizabeth L. Styer

**In memory of Keiichi Tanabe**  
Kathryn Cummings  
Susanna Davison  
Tsuneo and June Fujita  
L. Theodore Hoppe, Jr.  
Susan Lujan

**In memory of Keiichi Tanabe, in memory of Elizabeth Staller Whittle, and in honor of the Caregivers of Westmoreland**  
Karen Halstead

**In memory of Janet S. Tyson**  
Judy Tyson

**In memory of Howard J. Walton, II**  
Gary Walton

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Sam and Wynne Wharry

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**In memory of Mary Rankin Zalon**  
Al Zalon

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