



All About Kendal

Residents Handbook

This Handbook has been prepared for you. It is hoped that it will be helpful when you first join the Kendal Community and that it will continue to be one of your best sources of information during your years at Kendal.

Ever since the opening of Kendal at Lexington in July 2000, keeping residents informed has been an important goal of both the Residents Council and the Kendal Staff. As policies and procedures are developed and as they are changed, you will need to be informed. For this reason, the Handbook has been designed as a work-in-progress. It will be up to you to keep your Handbook up to date by inserting revisions and additions when they are provided.

It is hoped that this Handbook will enable residents to share a common understanding about the customs and practices that guide and enhance our life in this community. If you have questions or concerns about the information that is included, or if you need additional information, do not hesitate to contact the members of the Residents Council or the Kendal Staff.

Eighth Edition – Year 2019

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Emergencies

1. Medical Emergencies

MEDICAL EMERGENCIES

Call # 911

And at Any Time – 7 days a week, 24 hours a day

Use PET or Emergency Pull Cord

Call **Borden Center # 464-2632**

Kendal staff will respond to your location and can support you to call for
Emergency or non-emergent transportation as needed.

2. Fire and Safety Emergencies

Kendal at Lexington has an internal Fire Safety Plan for the protection of residents, staff and visitors. **When the fire alarm is sounding, unless you have smoke in your residence, remain in your residence.** If there is an actual emergency, staff or someone from the fire department will direct you to the nearest rally point. If the alarm stops sounding, you may be assured that the emergency has been taken care of and there is no further action necessary on your part.

Kendal at Lexington has a plan for the timely response to emergencies and the care of casualties arising from both external and internal disasters. In either case, residents are asked to stay in their residence unless in immediate danger. Staff or local authorities will respond to your location and direct appropriate emergency procedures.

3. Facility and Maintenance Emergencies

If you have an urgent maintenance problem between the hours of 8:30am and 4:30pm Monday through Friday, call the Receptionist at **463-1910**.
She will contact the maintenance staff to assist you.

Weekends, Nights and Holidays

Contact the Borden staff at 464-2632.

They will assist you and contact the appropriate on-call maintenance staff.

Transportation to Medical Appointments

1. Week Days

Plan Ahead

Call the **Receptionist** at **463-1910**.

It is possible to email as well to:

transportation@kalex.kendal.org

- Resident Volunteers – In-Town and Out-of-Town
- Other Options – Taxis and Commercial Drivers

More information is available on the alcove bulletin board

2. Evenings, Nights, Weekends and Holidays

When transportation is needed after office hours or on short notice:

Call the **Borden Center** at **464-2632**.

Smoking

**Kendal is a smoke
free campus.**

Kendal Management Team: Description of Responsibilities

Executive Director: Responsible for providing strategic and operational leadership to reflect Kendal values and standards of operational excellence. As the chief executive officer, carries full responsibility for all aspects of our retirement community. Responsible to The Kendal Corporation and Kendal at Lexington's Board of Directors for the successful operation of Kendal at Lexington.

Regular communication between residents and management is encouraged in both formal and informal ways. The executive director meets monthly with Residents' Council and the entire Residents Association, takes individual and group appointments, and welcomes the opportunity to answer questions, and discuss concerns or observations at practically any time.

Executive Assistant: Supports the Executive Director, the Board of Directors, the Board Committees and the area of philanthropy at Kendal at Lexington. Oversees the receptionist and actively participates in the leadership team of the organization.

Director of Dining (Culinary) Services: Responsible for the management of dining services including The Dining Room and The Restaurant as well as catering for the community, the nursing center dining services and meeting individualized nutritional needs in collaboration with the care plan team, physician and/or dietician.

Director of Operations: Responsible for facility services, including management of maintenance, housekeeping and laundry, security and building construction. Serves as the Safety Officer.

Finance Manager: Coordinates the financial affairs of Kendal at Lexington and prepares financial analyses of operations, including preparation of interim and audited financial statements with supporting schedules and accounts receivable. Responsible for financial plans and policies, accounting practices, relationships with lending institutions and financial community, maintenance of fiscal records, and preparation of ancillary financial reports. Also responsible for accounts receivable billing, accounts payable, internal controls, and budgetary controls.

Health Services Administrator: Promotes and serves the interests of residents and the long-term viability of Kendal at Lexington by planning and directing the operations of the Borden Health Center (licensed nursing) and the Webster Center (assisted living).

Director of Resident Services: Serves as a resource to all residents, coordinates the transition of residents among levels of living, assists with the implementation of new programs and services, and oversees the areas of wellness/fitness, social services, and activities; is responsible for the Vitalize 360 Program and serves as the Risk Manager.

Human Resources Manager: Plans, implements, and evaluates employee relations, human resource policies, programs, and practices. Also administers payroll functions, benefit programs and maintains accurate employee records. Charged with coaching the Leadership team to understand the Performance Management Partnership process, to develop proactive and positive staff morale and enhance teamwork as a community and in departments.

Director of Marketing and Public Relations: Implements a marketing strategy and an effective admissions and public relations program designed to achieve and maintain full occupancy of the community, a healthy waiting list, and a positive image in the larger community.

Director of Nursing, Health Center: Provides health care services by planning, implementing, controlling, and evaluating health care delivery programs and operations. Identifies nursing care requirements by establishing personal rapport with residents and other persons in a position to understand service requirements. Charged with improving nursing care services by identifying and establishing new programs; developing collaboration among medical, nursing, and administrative staffs; scheduling daily rounds to observe effectiveness of total care and instituting immediate changes as necessary.

Resident Care Clinic Manager: Responsible for provision of nursing services to Independent Living Residents, with a focus on the whole resident, to promote wellness as well as to provide care for acute and chronic illnesses. Additionally, is responsible for supervision and management of the Webster Center Assisted Living Facility.

Medical Director: Licensed local physician contracted by Kendal to provide specific consultative and review services and general clinical oversight of regulated areas (licensed nursing and assisted living), serves as a liaison with the local medical community, and advises Kendal regarding assessment of resident health needs and appropriate programs and services.

Section II. History and Mission - Contents

A. History of the Property

B. The Kendal Corporation

C. Mission Statement of Kendal at Lexington

II. History and Mission

A. History of the Property

Sunnyside House, the large three-story farmhouse on the Kendal property, which dates back to the late 1700's, was expanded over the years, and serves today as the community's guest house. The house, along with 85 acres, was a gift to Kendal from Isabel and Fred Bartenstein for the purpose of creating a retirement facility. Sunnyside House is listed on the National Register of Historic Places.

After having belonged to many owners, the house and farm were purchased in 1926 by Colonel James A. Anderson, his wife, and her two sisters, the Misses Helen and Ella Webster. Colonel Anderson was a VMI professor and dean and later was state highway commissioner. The Webster "girls" served as secretaries to the president and treasurer of Washington and Lee University. In addition to their professional activities, these owners operated a highly regarded dairy farm on the property for 30 years. Upon the death in 1985 of the last survivor, Miss Ella Webster, the four grown children of the Andersons inherited the property. By 1995, Isabel Bartenstein of New Jersey had bought out the interests of her siblings. She and her husband Fred later worked with Lexington and Rockbridge County residents to create the retirement community that is now Kendal at Lexington.

The capacious old house stood for some time in serious need of repair. But, thanks to Fred Bartenstein's extraordinary generosity and great desire to honor Isabel and the Anderson family, funds became available to stabilize the foundations, install new bathrooms, add wiring, plumbing, and heating and cooling systems, install an elevator, and provide new wall and floor treatment. Following this extensive renovation, a resident committee furnished the house with gifts from some 100 residents and friends. An official dedication of Sunnyside House was held in October of 2006. Subsequently, the grounds were re-landscaped and an old boxwood "secret garden" restored.

Today Kendal residents may reserve for their guests any of the five large bedrooms on the second floor (two of which are handicapped accessible), as well as sign up to use rooms on the first floor for meetings, classes, dinners, and receptions. These high-ceilinged rooms, each with at least one fireplace, include a large dining room which can seat 12, a well-equipped catering kitchen, a gracious parlor, a smaller library/game room, and a large meeting or Great Room seating 40 persons. The woodworking shop, a "train room" for local model train buffs, and a room used by resident artists are located in the basement..

A short drive from Sycamore Lane brings guests directly to a parking area for cars on the southwest side of Sunnyside House and provides basement access to the building and to the elevator.

B. The Kendal Corporation

Kendal's purpose is to serve older people by meeting their social, physical, and spiritual needs. To this end, Kendal communities seek to enhance the quality of life and independence of residents and to provide high quality health care so that each resident may realize his or her full potential.

Recognizing that Kendal retirement communities must be good places to work if they are to be good places to live, the Kendal Corporation is also committed to providing a high quality work experience for staff members. To achieve its purpose, the Kendal organization relies not only on the energies and goodwill of its staff members, board members, and residents but also on the exchange of ideas with others who serve older people. Kendal takes an active role in public policy issues that affect older people and participates in many professional associations.

Members of the Philadelphia Yearly Meeting of Friends (Quakers) founded the first Kendal community in 1973 in Pennsylvania. Kendal's founders believed that they could provide a better way of life for older people, building communities and providing services that were based on the Quaker values of respect for the individual, equality, community, and financial reliability.

The Kendal Corporation, based in Kennett Square, Pennsylvania, is a not-for-profit, charitable organization governed by a Board of Directors, a majority of whom are members of the Religious Society of Friends. Kendal has over 40 years' experience in the successful development and operation of communities that serve older adults and has received national recognition for excellence in the field of care for the aging. Today, there are thirteen Kendal continuing care retirement communities in eight states. In response to requests from groups of local citizens in new areas, Kendal continues to develop new communities and affiliate existing communities.

The Kendal Corporation and its affiliates fulfill their charitable purpose in many ways, including financial assistance funds for residents, educational opportunities for staff members, and service to the wider community through a variety of outreach and educational programs. Kendal's Untie the Elderly program, for example, has made a significant impact nationally in reducing the use of physical restraints in the care of the elderly. Kendal Charitable Funds, a supporting organization of The Kendal Corporation, is responsible for furthering its charitable purposes in all of these areas.

C. Mission Statement of Kendal at Lexington

Mission Statement

The mission of Kendal at Lexington, a not-for-profit Life Plan Community grounded in Quaker values, is to provide opportunities for a diverse population of older adults from Lexington, Buena Vista and

Rockbridge County, Virginia and beyond, to live in a vibrant, caring community that promotes healthful and meaningful aging.

The mission includes a commitment to

- provide quality, person-centered care;
- employ and support a competent staff;
- be alert to emerging trends in the care and interests of the age demographic we serve;
- maintain a sound financial operation;
- actively engage in the life of the geographic community;
- be stewards of our environmental resources; and
- maintain and expand resources available to support residents, both current and future, who may need financial assistance.

Approved by the Board of Directors
July 19, 2018

Strategic Planning Underway

The Board of Directors has undertaken initiatives focused on updating Kendal at Lexington's Strategic Plan. As a part of the strategic planning activities, the Board is reviewing the current state-of-affairs and determining areas and/or programs where new or improvement opportunities may be identified. The Board has engaged experts in the field, the leadership team and local community members as well as Kendal Corporate staff. The process was kicked off with a Board Retreat including core leadership team members where Mr. Robert Kramer shared predictions and industry trends specific to the aging population and the provision of care. Since that retreat, the Board has defined six areas for further study, creating the following exploratory Task Groups:

- Expectations of current and future residents
- Information Technology: Future State
- Work Culture
- Community Engagement
- Medical Services
- Resource Preservation

It is expected that as the Board of Directors and supporting Task Groups complete their work in early 2020, a new five-year strategic plan will emerge. For more information contact the Executive Director or Chairman of the Board of Directors.

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III. Residents Association

A. Overview

All residents of Kendal at Lexington (as specified in the Residents Association Bylaws Section 1.4 Membership) are members of the Residents Association. The Association meets regularly throughout the year at times announced well in advance of the meeting (generally the third Wednesday morning of each month). All residents are encouraged to attend and participate. The Annual Meeting is held in November.

The members of the Association elect a Residents Council of seven members (four officers and three members-at-large), which has full power to manage the affairs of the Association. All Council meetings are open. You are welcome to attend.

The Bylaws of the Residents Association are included as Section IV-F of this Handbook. All residents are encouraged to become familiar with these Bylaws. The Residents Council aims to be responsive to the ideas, preferences, and problems of residents. Here are some ways to make your views known:

- Contact members of the Council
- Ask to be on the agenda of the Residents Council meeting

Notes (informal minutes) from Residents Association meetings are placed in each mailbox as soon as possible after each meeting. Minutes of the Residents Council meetings are posted in the Alcove and are placed in a permanent notebook in the Tutwiler Library following their approval.

B. Committees

One of the best ways for Kendal residents to become involved in the life of the community is by participating in the committees. The list below will help you understand the committee structure. Do not hesitate to become involved. We Need You!

List of Committees

1. Nominating Committee

The Nominating Committee shall consist of five members appointed by the Residents Council.

- Presents slate for open offices for Annual Meeting

2. Executive Committee

The four elected officers of the Residents Association

3. Audit Committee

- a. Appointed yearly by the Residents Council
- b. Audits the treasurer's accounts

4. Committees of the Residents Council

- a. May be appointed by the President as needed.
- b. These committees include one or more Residents Council members and one or two residents who are not on the Residents Council.
 - Budget Committee – Prepares budget and oversees finances of the Association.
 - Handbook Committee – Sees that the Residents Handbook is kept up to date.
 - Coordination Committee – Helps all committees and special interest groups to work together and effectively. If you have a special interest, the convener of the Coordination Committee will be glad to assist you in joining a group or starting a new group (not currently active).
 - The Suggestions and Concerns Committee -- listens to concerns and complaints from residents and takes appropriate steps to see that they are responded to within a reasonable time.

5. Other Committees Established by the Residents Council

- a. Standing Committees
 - These are the committees that plan for and oversee the major activities of the community.
 - Membership is open to all interested residents. Each year, residents are given the opportunity to sign up for the committee(s) they would like to join. A description of these committees is contained in Section IV-C. A list of current conveners is posted on the bulletin board in the Resident Alcove.
- b. Ad Hoc Committees
 - Established by the Residents Council as needed.

C. Standing Committee Descriptions

1. Bereavement

This committee assists staff with arrangements at the time of a death in the community. Staff is responsible for posting information as soon as it is available and for assisting with any services scheduled at Kendal. Staff offers continuing support to a surviving spouse. (Not currently active)

2. Culture and Entertainment

This committee plans, promotes, and presents cultural and entertainment programs, both on and off the Kendal campus, that may be of interest to the residents.

3. Facilities

This committee deals with suggestions and concerns about the Kendal physical plant, campus and other issues related to an individual apartment or cottage. It also

focuses on the development and care of the system of trails around the Kendal campus.

4. Food and Dining Services

This committee meets monthly with the Dining Services staff. It functions as a liaison between residents and staff and assists in planning for menu innovations, special events, changes in service, and other related matters. The committee does not make policy for the Dining Services department.

5. Furnishings and Interiors

This committee is concerned with the furnishings and decoration of the indoor common areas used by the residents, including the placement of artwork. It recommends policies and procedures related to its area of concern, including the acceptance and placement of donated items.

6. Horticulture and Landscaping

This committee is concerned with the overall appearance of the Kendal grounds and with landscaping plans and procedures, especially as they affect residents. Upon request, it advises and assists residents with their planning for individual gardens adjacent to apartments and cottages.

7. Library

This committee oversees the operation of the Kendal library system. It arranges for the acceptance of donated books and periodicals, and for their placement in the Tutwiler Library or on the satellite shelves located around the campus. It arranges for a memorial book to be placed in the library upon the death of a resident.

8. Newsletter

This committee produces a monthly newsletter (*CONNECTIONS*) including a calendar of events. It oversees the distribution of the newsletter to current and potential Kendal residents, staff, and Kendal affiliates.

9. Vespers

The committee plans for an ecumenical Vespers service (including communion) in Anderson Hall on Sunday afternoon by furnishing ministers, piano assistants and other helpers to set up for the service.

10. Transportation

This committee plans for the shopping bus into town and an activities bus to off campus events. The committee maintains a volunteer driver list on the alcove bulletin board (committee not currently active).

11. Welcome and Orientation

This committee welcomes new residents to their home at Kendal. It provides general information about Kendal and the Lexington community and advises about the use of the Residents Handbook. It arranges for tours of the area for residents who are new to Lexington.

12. Wellness

This committee promotes the health and well-being of residents. It facilitates the flow of information about available services, identifies unmet needs, and, if possible, finds ways to meet those needs. It responds to concerns of residents regarding health and fitness and plans health education programs.

D. Opportunities for Resident Giving

1. Residents Association Fund

According to the Residents Association Bylaws (Article III, Section 3.1 (2), the Residents Council “may solicit voluntary contributions such as shall, at its discretion, be needed to finance the activities of the Association.” A general assessment may not be imposed. Funds to Residents Association are not tax deductible.

2. Staff Appreciation Fund

- a. Kendal has a policy that residents may not tip staff members for any services provided, nor may employees accept any sort of tip or gift, unless it is something that can be and is shared among a group of staff members (*e.g.*, a box of apples for the staff break room). This policy is to prevent favoritism and is strictly enforced.
- b. In lieu of tipping, and because many staff members assist residents from behind the scenes, all residents (independent, assisted living, and nursing) are encouraged to contribute semi-annually to the Staff Appreciation Fund. A letter is sent to residents by the Residents Council, usually in May and November, asking for contributions and suggesting guidelines. Requests are also sent to families of those residents who do not handle their own affairs. According to legal counsel, the gifts are tax-deductible, and only the accounting office knows who contributed how much.
- c. The money collected is divided among all but the most senior staff by a formula based mainly on the staff member’s scheduled hours and longevity as a Kendal employee. In June and December, the gifts are distributed, customarily at a Staff Appreciation Party, which is an opportunity for staff and residents to become better acquainted and for residents to thank the staff in person for their efforts.

3. Kendal at Lexington Fellowship Fund

- a. The Lexington Retirement Community Board of Directors has established this fund. It provides a resource for financial assistance to residents in accordance with procedures and priorities established by the Board. This fund gives residents the peace of mind that they will never have to leave Kendal for financial reasons. Management of the KaLex Fellowship Fund is the responsibility of the Executive Director and members of the Executive Committee of the KaLex Board of Directors. Neither Kendal Corporation nor Kendal Charitable Funds is involved in administering the Kendal at Lexington Fellowship Fund.

- b. The Board, through the Philanthropy Committee, is responsible for providing an ongoing plan to solicit contributions. An important aspect of this solicitation plan is informing all residents about the purpose of this fund and about the various ways they can contribute. On a regular basis, residents will be asked to support this fund. Helping to increase the funds available for financial assistance is a major opportunity for Kendal residents.

4. **Special Project Funds**

Concerns about current and future needs of Kendal have led generous donors to establish the following funds to address specific concerns and are tax deductible. Residents, families and friends may make tax-deductible donations to each of these special opportunities.

Dementia Care Fund provides financial support to enhance dementia services across the continuum of care.

Sunnyside House Fund provides financial support for major repairs and renovations to our beautiful Sunnyside House, our much-enjoyed guest house and the original nineteenth-century home.

Borden Center Fund provides financial support for major initiatives at the Borden Center, the 60-bed skilled nursing facility that serves Kendal residents as well as the Rockbridge area.

Webster Center Fund provides financial support at the Webster Center, the 20-unit assisted living facility that primarily serves Kendal residents.

Landscaping Fund provides financial assistance for major landscaping projects and improvements.

Sustainability Fund provides financial support for projects that will enhance the environmental sustainability of our Kendal community.

5. **2020 Campaign for KaLex**

Permits every resident to contribute over five years to the necessary renovation of the Borden Center and the Webster Center.

6. **Donations in Kind**

Residents wishing to make donations of furniture, artwork, landscaping features, or other tangible items should contact the Executive Director. The acceptance of gifts by the Executive Director will be made after consultation with the appropriate resident committee (*e.g.*, Facilities, Furnishings and Interiors, Horticulture).

E. **Residents Association Guidelines**

The Kendal at Lexington Residents Council has approved, over the years, a few major guidelines relating to the conduct of resident affairs. The following is a summary of these.

1. **Staff Appreciation Fund**

This fund and the reasons for it are described under D.2.

2. Fundraising and Solicitation

- a. Fundraising at KaLex is regulated for the protection of residents. Salespeople and fund raisers may not come to your home unless you have invited them.
- b. Fundraising for KaLex must be approved by the Residents Council and the Executive Director.
- c. Fundraising for outside groups may only be done on an individual basis. No appeals may be placed in the open mailboxes, but a notice about the appeal may be placed on the "Community Opportunities" bulletin board. Residents are encouraged to give to the charities of their choice. Programs and fundraising events at KaLex by/for outside groups may be held only if they conform to strict criteria as found in the Residents Association Guidelines folder in the library.

3. Programming Guidelines

In order to avoid divisiveness, there will be no programs in which political or religious "preaching" or prayer is included, unless this is given by a KaLex residents' interest group and the content of the program is clearly advertised in advance.

4. Wine and Beer Service

Wine and beer may be ordered by the glass in the dining room. This is done at the cash register or, in the case of residents receiving waited service, from the wait-staff. No alcoholic beverage may be brought into the dining area by residents.

Residents Association Guidelines updated and approved December 13, 2007

F. Bylaws of the KALEX Residents Association

Article I: Name, Purposes and Membership

Section 1.1 Name. The name of the organization is Kendal at Lexington Residents Association (KALEXRA); hereinafter call the "Association." It is in the Kendal at Lexington continuing care retirement community, at 160 Kendal Drive, Lexington, VA 24450.

Section 1.2 Purposes. The purposes of the association are:

1. To work in cooperation with Administration, Staff and Board of Directors of Kendal at Lexington to establish:
 - a. A community in the true sense of the word, one in which the individual person is nurtured, and participation in the corporate body of residents and staff is enhanced.
 - b. A community where each resident and the corporate body of residents are committed to a life of openness, careful listening, and respect and care for each other.

- c. A community that promotes the social, cultural, emotional, physical, spiritual and recreational well-being of every member of the community.
 - d. A community where the members respond to one another with sensitivity, good will, and patience with the expectation that issues, and problems can be resolved.
 - e. A community where the values and standards set forth in the publication Values and Practices – The Kendal Corporation are realized.
2. To act as a sounding board for residents' concerns and initiatives and as a channel for the residents to communicate with the administration and the Kendal at Lexington Board of Directors.
 3. To serve as an association exclusively for charitable, religious, social and educational purposes, including the making of distributions to organizations that qualify as exempt organizations under Section 501 (c)(3) of the Internal Revenue Code, or corresponding section of any future federal tax code. To act, if its members wish, as a "group" sponsoring group insurance for its members.

Section 1.3 Limitations

1. The Association does not contemplate pecuniary gain or profit, incidental or otherwise, to its members. No part of the earnings of the Association shall be distributable to its members or officers, except that the Association shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in the purpose clause hereof.
2. The organization shall not participate in, nor intervene in (including the publishing or distributions of statements) any political campaign on behalf of any candidate for public office.
3. Notwithstanding any other provisions of this document, the organization shall not carry on any activities not permitted to be carried on (a) by an organization exempt from federal income tax under Section 501(c) (3) of the Internal Revenue Code, or corresponding section of any future federal tax code, or (b) by an organization, contributions to which are deductible under Section 170(c) (2) of the Internal Revenue Code, or corresponding section of any future federal tax code.

Section 1.4 Membership. All residents admitted to Kendal on the basis of a Residence and Care Agreement and all residents admitted to Kendal's assisted living center are and shall be members of the Residents Association. All members are eligible to participate in all activities, including attendance at committee meetings.

Article II: Meetings of Members

Section 2.1 Place and Time. Regular meetings of members of the Association shall be held at Kendal at Lexington at times fixed by the President of the Residents Council. The Annual meeting shall be held in November.

Section 2.2 Notice of Meetings. The Secretary shall give notice of the Association meetings by posting a written notice on the bulletin boards of the Community Center and the Webster Center and by placing a copy of the notice in each member's open mail box.

There shall be not less than three weeks' notice of the date of the Annual Meeting and not less than five days' notice of any special meeting of the Association.

Section 2.3 Purpose of Annual Meeting. Officers and other members of the Residents Council shall be elected at the Annual Meeting. Other business deemed appropriate may also be transacted.

Section 2.4 Special Meetings. Special meetings of members of the Association may be called by the President or by a majority of the Residents Council. In addition, in response to a written request from not less than ten members of the Association, the President shall call a special meeting, such meeting to be held within twelve days of receipt of such request.

The notice of a special meeting shall state the purpose of the meeting, and no other business shall be conducted at the special meeting.

Section 2.5 Quorum. Twenty-five percent of the total number of members in residence at the time of the meeting shall constitute a quorum for the transaction of business.

Section 2.6 Voting.

Elections. Election of members of the Residents Council, as presented on the single slate by the Nominating Committee, may be by voice vote.

All Other Voting. Voting shall be by voice vote except when a motion to vote by ballot on a specific proposal shall be approved by a majority

Article III: Residents Council and Nominating Committee

Section 3.1 Residents Council.

1. **Number.** There shall be seven elected members of the Residents Council: four officers including the President, Vice President, Secretary and Treasurer and three members-at-large.

Organized resident groups at Webster Center and the Benjamin Borden Health Center shall be invited to name a resident to serve as liaison with the Residents Council. Such liaisons shall be invited to attend and participate in all meetings of the Council with the exception of any Executive Sessions.

2. **General Powers.** Subject to these Bylaws and the powers of the members of the Association, the elected members of the Council shall have full power to manage the affairs of the Association. The Council may solicit voluntary contributions such as shall, in its discretion, be needed to finance the activities of the Association. Neither the Council nor the Association may impose a general assessment on the members of the Association.
3. **Meetings.** Meetings of the Council shall be held at times and places at Kendal at Lexington as may be fixed by its members, or at the discretion of the President. A special meeting shall be called by the President upon the written request of at least four members of the Council, to be held at a time and place at Kendal agreed upon.

Meetings of the Council, except when in executive session, are open to all members of the Association who may speak to the issues. Executive sessions are permitted but should be limited to unusual situations. Final decisions by the Council may not be made in executive session.

4. **Quorum.** Four members of Council shall constitute a quorum.

Section 3.2 Nominating Committee.

1. **Number and Chair.** The Nominating Committee shall consist of five members appointed by the Residents Council. A member may not serve on the Nominating Committee while serving on the Residents Council. In the event of a vacancy on the Nominating Committee, the Residents Council shall appoint a replacement to the complete the balance of the term.

At the beginning of each year, the Nominating Committee shall elect its own Chair. If the Chair is unable to serve the full year, a new Chair shall be elected.

2. **Responsibilities.** At least 8 weeks before the Annual Meeting, the Nominating Committee shall invite residents to submit suggestions for consideration for all the elected positions that are open. The Nominating Committee shall advise residents that suggested names must be submitted in writing and delivered to the Chair of the Nominating Committee at least 6 weeks prior to the Annual Meeting. The Nominating Committee shall give careful consideration to all suggestions in selecting a slate of nominees. Any such suggestions, however, shall not limit the choice of the Nominating Committee in selecting a slate.

Three weeks prior to the Annual Meeting, the Nominating Committee shall distribute to all residents a single slate of nominees for Officers and Members-at-Large of the Residents Council. Prior to publishing the slate, the Chair of the Nominating Committee shall secure from each nominee whose name appears on the slate consent to be on the slate and willingness to serve if elected.

Article IV: Election of Officers and Members-at Large of the Residents Council

Section 4.1 Election of Officers.

At the annual meeting of the Residents Association, the members in attendance will be asked if they wish to approve the proposed slate of four officers (President, Vice President, Secretary and Treasurer) and new Member(s)-at-Large. The officers will serve for one year but may be elected for a second-year term. Newly elected officers and Members-at-Large will be invited to attend the meetings of the Residents Council, in a non-voting status, following their election and before taking office on January 1.

If the proposed slate is not approved, the Nominating Committee will meet again and prepare another slate of officers.

No officer shall serve in the same office for more than two consecutive one-year terms. An officer may be considered for additional terms in that office after a one-year break. The maximum consecutive time of service on the Residents Council shall be four years. If the partial year of service is less than six months that term shall not be considered a full year. More than six months of service shall be considered a full year for the purpose of determining eligibility.

In the event that the President shall resign, or shall, in the judgment of the other members of the Council, be unable to serve, the Vice President shall become President. In the event of a vacancy in the offices of Vice President, Secretary, or Treasurer, the Council shall appoint a replacement to complete the balance of the term.

Section 4.2 Election of Council Members-at-Large. The term of office of the three members-at-large shall be two years staggered so that two are elected in a given year and one in the following year. Newly-elected Council Members-at-Large shall take office on January 1. They are expected to attend meetings of the Residents Council between their election and January 1, but only members of the current year shall have a vote. Council Members-at-Large shall be elected to serve one two-year term and then may be considered for a second term in the same position only after a one-year break. The maximum consecutive time of service on the Residents Council shall be four years. If the partial year of service is less than six months that term shall not be considered a full year. More than six months of service shall be considered a full year for the purpose of determining eligibility.

In the event of a vacancy, the Council shall appoint a replacement to complete the balance of the term.

Section 4.3 Terms and Appointment of the Nominating Committee.

Following each Annual Meeting and prior to January 1, the outgoing Residents Council shall appoint members of the Nominating Committee from the membership of the Residents Association, to serve beginning January 1. Three of the appointees must have been presidents or vice presidents of the Residents Association, if available. Current members of the Residents Council are not eligible for membership on the Nominating Committee. The Nominating Committee will elect its own chair. In the event of a vacancy on the Nominating Committee, the Residents Council shall appoint a replacement to complete the balance of the term, which shall be two years on a staggered basis. A partial year of service shall be considered a full year.

Article V: Committees

Section 5.1 Executive Committee. There shall be an Executive Committee consisting of the four elected Officers. The Executive Committee may meet on one day's notice, and when the Council is not in session shall have and may exercise all the powers and duties of the Council. Three Officers shall constitute a quorum. Any actions taken by the Executive Committee shall be reviewed at the next Council meeting.

Section 5.2 Audit Committee. Annually the Council shall appoint members of the Association to audit the accounts of the Treasurer for the current fiscal year. The Committee's report shall be delivered to the President, who shall have it posted on the bulletin board of the Residents Association Office.

Section 5.3 Residents Council Committees. The President shall appoint members of the Residents Council to each of the following committees and designate their chairs. The committee chairs shall, in consultation with Council, select one or two non-council members to serve as members of each of these committees.

The Budget Committee is charged with preparing a coordinated budget for the following year, working with the Treasurer and with other committees to reach an estimate of income sources and proposed expenditures. The Committee shall also monitor ongoing income and outlay during the year as compared to budget and report any major imbalances to the Council.

The Suggestions and Concerns Committee is charged with listening to concerns and complaints from residents and taking appropriate steps to see that they are responded to within a reasonable time (*committee not currently active*).

The Coordination Committee is charged with helping all committees and special purpose groups of the Residents Association. The Committee shall endeavor to avoid duplication, to

facilitate communication and to assist with the resolution of problems (*committee not currently active*)

Section 5.4 Other Committees established by the Residents Council.

1. **Standing Committees** are essential to the conduct of the business of the Association or the Council.

The President, with the approval of Council, shall appoint the chair of each standing committee who may serve no more than two consecutive one-year terms. A partial year of service shall be considered a full year. Residents shall be appointed to the committee by the President in response to suggestions of the chair and to expressions of the residents as to their interest and willingness to support the work of the committee. The president shall be an ex-officio member of all standing committees.

2. **Ad Hoc Committees** that are established to perform specific tasks. The President with the approval of the Residents Council shall appoint the chair and the resident members of the committee.

The structure of the committee and a statement of its charge shall be included in a written statement at the time it is established. The President shall be an ex-officio member of all ad hoc committees.

Section 5.5 Resident-Initiated Committees and Groups. Residents may organize activity committees, interest groups or support groups that function with limited structure and are open to all members of the Association. They are, however, expected to function in accordance with policies established by the Council and should maintain liaison with the Council's Coordination Committee and Budget Committee. Each group shall select its own chair or convener without restriction as to term of office.

Section 5.6 Budget Requests. Standing Committees, Ad Hoc Committees, and resident initiated committees and groups are eligible for the Association's financial support. Applications for funds shall be submitted to the council's Budget Committee by September 10 of each year for the succeeding calendar year.

Section 5.7 Annual Reports. Standing Committees, Ad Hoc Committees and resident-initiated committees and groups shall submit to the Council annual reports not later than October 1, stating their purposes, activities and accomplishments. Reports should also state the extent to which the committee's mission has been achieved and give information of plans for the coming year. The Council may from time to time request special reports. Each committee is invited to propose new policies and goals to the Council.

Section 5.8 Publication of Committee Lists. During the first quarter of each calendar year the Council will issue a list of active Standing Committees, Ad Hoc Committees, and resident-

initiated committees and groups. This list shall be placed on file in the Kendal Library, and shall be made available at the front desk and at the bulletin board in the Community Center.

Article VI: Officers

Section 6.1 President. The President shall be the Chief Executive Officer of the Association and shall have general oversight responsibility for its operations and affairs, subject to the direction of the Council. The President shall preside at meetings of the Association, the Council and the Executive Committee.

Section 6.2 Vice President. In the absence, disability, or resignation of the President, or when requested by the President, the Vice President shall have the powers and duties of the President.

Section 6.3 Secretary. The Secretary shall record the votes of the Council at meetings, shall keep the minutes of Association and Council meetings, and shall see that notices of meetings of the Association are given according to Section 2.2 of these Bylaws. The Secretary shall also see that minutes of the Council meetings are deposited in the Kendal library.

Section 6.4 Treasurer. The treasurer shall perform such duties as customarily pertain to the office, submit to an annual audit of the books as provided in Section 5.2, and at the direction of the Council maintain deposits in authorized financial institutions.

Article VII: Miscellaneous

Section 7.1 Fiscal Year. The fiscal year of the Association shall begin on January 1 and end on the last day of December.

Section 7.2 Relations with Board of Directors and Administration. The President of the Association or an alternate designated by the President shall be a nonvoting, ex officio representative to the Kendal at Lexington Board of Directors. The Board of Directors, in turn, shall be invited to select a member of the board to serve as a nonvoting liaison with the Association and Council. The Administration shall be invited to send a nonvoting representative to all meetings of the Association and Council.

Section 7.3 Communication. Members of the Association may at any time address members of the Council by a signed note in the open mailbox maintained by Council.

Section 7.4 Resignations. Any Officer, Council Member-at-Large or Nominating Committee member may resign by giving written notice to the President or Secretary. Any such resignation shall take effect at the date of the receipt of such notice or at any later date therein specified, and unless otherwise therein specified, acceptance of such resignation shall not be necessary to make it effective.

Section 7.5 Dissolution of the Association. If the Association shall at some future time be dissolved, the Council, after payment of all liabilities, shall dispose of all assets to an organization or organizations operated exclusively for such charitable, educational, religious or scientific purposes as shall at the time qualify for exemption under Section 501 (c)(3) of the Internal Revenue Code, or corresponding section of any future tax code.

Article VIII: Amendments

Section 8.1 Amendments. These bylaws may be amended by a majority vote of those present at an Annual Meeting of the Association. Such amendments may be proposed by the Council or by the signed petition of ten members of the Association. They must be distributed by the president to the members of the Association at least three weeks in advance of the Annual Meeting.

Adopted February 2, 2001
Amended November 19, 2003
Amended November 15, 2006
Amended November 19, 2014
Revised October 2015
Amended November 18, 2015

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IV. General Information

A. Apartments and Cottages

1. Modifications to Your Residence.

Contact the Director of Operations if you wish to modify your residence. Most modifications will be at your expense.

a. Alterations.

Examples might include new flooring, built-in book cabinets, ceiling fans, grab bars, additional lighting, etc. If you desire to modify your residence, you must have prior approval. Contact the Director of Operations for approval.

b. Ceiling Fans.

Outlets for ceiling fans are provided. You must arrange the purchase of fans and their installation at your expense.

c. Patio Enclosures.

Some of the patios have been enclosed. If your patio is not enclosed, you may consider having it done at your expense. Contact the Director of Operations for approval and assistance.

2. Staff Entry to Residences.

It is the practice of Kendal staff not to enter a residence without prior permission, except in cases of medical, fire or mechanical emergencies. To give permission for housekeeping staff to clean your residence in your absence, you are asked to sign a housekeeping waiver and file it with the Maintenance department.

3. Changes in Living Accommodations

It is our policy to approve accommodation changes initiated by you for the following reasons only: health, financial, death of a spouse or other co-resident, and marriage. If you move from one accommodation to another, you shall pay the applicable Monthly Fee for the new accommodation. Requests for residential living accommodation changes should be made in writing to the Marketing department and must be approved.

4. Housekeeping.

Housekeeping Services aims to provide services that will satisfy residents. The following policies and procedures were developed with the assistance of Kendal residents.

a. Housekeeping Standards.

The Housekeeping Services staff is available between 8 a.m. and 3 p.m., Monday through Friday and limited weekend hours.

Common areas of Borden Center, Webster Center, Anderson Community Center and entranceways of buildings are cleaned daily. Assisted living suites are cleaned weekly. Standards for cleaning activity and time have been established to provide consistency and coordination within the workforce. Staff is not permitted to work beyond the established time or to complete tasks other than listed. Staff is not permitted to neglect tasks that residents feel are not necessary because the long-term condition of the property is the responsibility of Kendal. Housekeeping staff is expected to report needed repairs, alterations, modifications, and damages found in cottages and apartments.

b. Apartment and Cottage Housekeeping Procedures.

Housekeeping services are scheduled bi-weekly for all residences. Any change in the scheduling shall be worked out in advance with the Housekeeping staff. It is not necessary for residents to be present during the cleaning. Residents should prepare for their Housekeeper by straightening and removing articles from bureaus, desks and other flat surfaces that are to be dusted. The Housekeeping staff is not permitted to remove articles from the surfaces of furniture or shelves.

c. List of Services (Bi-weekly Cleaning).

- Bathroom: Thoroughly clean toilet, tub and/or shower enclosure, sink, mirror, towel bars, all fixtures, counter top, vanity and light fixtures. Sweep & wet mop tile floor. Clean door and vent. Wipe medicine cabinet.
- Kitchen: Clean stove and drip pans, stove hood, filter, exterior of refrigerator, sink, counter tops, back splash and fixtures. Wipe out microwave. Wipe down outside of cabinets. Sweep & wet mop tile floor.
- Bedroom(s): Dust all furniture when resident has removed all articles from surfaces. Vacuum/clean the floors and under the beds. Wipe windowsills. Clean door. Dust blinds.
- Living Room/Den/Enclosed Porch: Dust all furniture when resident has removed all articles from surfaces. Vacuum/clean the floors, moving light furnishings to do so. Wipe windowsills. Clean doors. Dust blinds.
- Patio area: Sweep cobwebs from ceiling and wipe light fixtures. Sweep patio floor.
- Outside Front Entrance: Sweep walk and cob webs. Wipe down window frames and light fixtures.
- As Time Permits: Spot clean walls as needed. Wipe down all doors. Damp dust baseboards and vents. Check for cob webs and remove. Dust wall- hung picture frames.

d. List of Services (Semi-Annual "Heavy Cleaning").

In addition to items listed above, the following will be included in semi-annual "heavy cleaning". Notice will be given two weeks prior to heavy cleaning.

- Move all furniture that is not too heavy for two people to handle and clean under and behind it.
- Clean side and top of refrigerator and clean interior, if pre-arranged.
- Clean interior of oven, if pre-arranged.
- Clean and vacuum sides, top and floor around washer/dryer. Vacuum lint trap channel as deep as possible.
- Clean floor and around hot water heater and air handler.
- Clean patio area and front entrance. Sweep walk, clean light fixtures, window frames. Remove cobwebs. Clean door.
- Vacuum overstuffed furniture.
- Turn mattress (if requested).
- Wipe down all cabinets, inside of doors also.
- Wipe all blinds & windowsills.

e. Additional Services (Scheduled Periodically).

- Wash windows inside, including patio windows, clean screens and tracks and wipe blinds.
- Outside window cleaning will be performed by an outside contractor.

f. Cleaning of Carpeting.

Carpets are shampooed at resident's request but not more frequently than every six months. Submit a work order to Maintenance. For quick spot cleaning of carpets, also submit a work order.

5. Maintenance and Repairs.

Kendal will repair, maintain and replace property and equipment owned by Kendal. Use WorxHub to submit Maintenance Work Orders online. If you do not have access to WorxHub, please contact the Director of Operations who can assist you in gaining access. You can also complete the Work Order Form and return it to the Receptionist in Anderson who will initiate a WorxHub work order on your behalf.

Emergencies in your residence may require immediate attention (examples: failure of the refrigerator or water leaks). In this case, inform the Receptionist, who will immediately call for assistance. At night or on weekends contact Borden Center staff and they will arrange for the needed repairs.

For routine work orders: Use WorxHub or the Work Order form working through the Receptionist.

For emergency requests on Weekdays dial 463-1910 (Receptionist)

For emergency requests at night or on the weekend dial 464-2632 (Borden Center)

6. Flower Beds and Gardens.

Residents in ground-level apartments and cottages may choose to establish flower beds/gardens within the four-foot strip adjacent to their dwelling. For the sake of botanical and residential harmony, residents are encouraged to consult with their neighbors and the Horticulture Committee about their planting plans. If residents wish to plant outside the four-foot limit, they must request approval from the Director of Operations so that their plan can be reviewed for compatibility with the existing landscaping and with future Kendal planning. If the resident establishes a flower bed/garden, the resident is responsible for its maintenance. If residents choose not to plant a flower bed/garden, Kendal is responsible for maintaining the area within the four-foot strip.

7. Waste Disposal and Recycling

a. Recyclable household waste includes newspaper, paper, cardboard, glass bottles and jars, aluminum and tin cans, and number 1 and 2 plastic bottles and jugs. (Note: these categories are subject to change. Consult Anderson Hall Alcove bulletin board for current information.) Deposit in bins in trash rooms or bins provided to individual cottages on Sycamore Lane and Sunrise Ridge Circle.

b. Household waste includes (but is not limited to the following:

- General refuse and garbage
- Styrofoam (egg cartons, packing materials, plates, cups)
- Waxed milk or juice cartons

- Broken glass, light bulbs, mirrors
- Yard trim

Tie up household waste in plastic bags and deposit in barrels in trash rooms in bins provided to individual cottages on Sycamore Lane and Sunrise Ridge Circle.

c. **Recycling of plastic shopping bags.**

- Take to Wal-Mart, Lowes and area supermarkets

d. **Hazardous Waste.**

- **Inkjet cartridges, CFL light bulbs, and batteries.** Take to special recycling containers located in the Alcove in Anderson Hall.
- **Medical waste.** Take to the Clinic.
- **Unused prescriptions.** Take to the Clinic.

e. **Pet Waste**

- Dispose of pet waste in appropriate **outdoor receptacles.**

8. Fire Safety

a. **The Power of Fire.**

Fire is sinister. It can start and consume your entire residence in just minutes. It is not the flames that kill; it is the smoke. Nearly all home fire victims die primarily from the effects of smoke.

b. **Fire Causes and Prevention.**

More people die in fires started by smoking materials than in any other type of fire. Cooking is a leading cause of home fires and fire injuries, with stove fires being a primary cause. Take extra care when frying or cooking with oils or grease products. Using a fire extinguisher or water will cause the hot oil to splatter, spreading the fire. If the lights go out, choose a battery-operated light. Do not use candles.

c. **Smoke Detectors, Building Alert, and When to Leave**

At Kendal, **smoke detectors** are installed in all residences and common areas. They are connected to a central system that will react automatically. The fire alarm pull boxes in the common areas and corridors are connected to the same central system. If smoke is detected by the central system, a general ("building") alarm is sounded to all parts of the Anderson Center as an alert.

Kendal at Lexington has an internal Fire Safety Plan for the protection of residents, staff and visitors. **When the fire alarm is sounding, unless you have smoke in your residence, remain in your residence.** In an actual emergency, staff or someone from the fire department will direct you to the nearest rally point. If the alarm stops sounding, you may be assured that the emergency has been taken care of and there is no further action necessary on your part. **If you are in a hallway or common area, please proceed to the closest rally point for further instruction.**

Kendal at Lexington has a plan for the timely response to emergencies and the care of casualties arising from both external and internal disasters. In either case, residents are asked to stay in their residence unless in immediate danger. Staff or local authorities will respond to your location and direct appropriate emergency procedures.

When to Leave?

When you see a visible fire, leave immediately.

When you smell smoke, leave immediately.

When staff knocks on your door and tells you to leave, leave immediately.

Do not re-enter for any reason, even for pets. Proceed to your nearest rally point. Please remain at Kendal so you can be accounted for.

Rally Points:

- Kendal Hall
- Fitness Center
- Borden Dining Room
- Main Dining Room

If a smoke detector is beeping in your residence, call maintenance and they will replace the battery.

d. Hazardous Items

Combustible materials (such as gasoline, propane, oil-based paint, turpentine, and alcohol) are not to be stored in your residence, garage or in your storage spaces. Small amounts for hobbies are permitted.

In accordance with fire regulations, live greens, such as wreaths and holiday trees, are not permitted in the apartments, Borden Center and Webster Center. Kendal policy strongly recommends against live greens in the cottages.

e. Fireplaces

If you have a gas fireplace, please observe the following precautions:

- Be sure the fireplace is turned “off” when unattended.
- Do not leave your residence or go to bed/sleep with the fireplace on.
- Keep combustible materials away from the fireplace.

f. Smoking

Kendal is a smoke free campus. Residents may smoke inside of their apartments and cottages only.

No smoking is allowed by residents living in Webster Assisted Living or the Borden Nursing Center.

Staff is permitted to smoke only in designated smoking area.

9. Elevator Safety

All elevators are provided with the following safety features to be used if a resident is “stuck” in the elevator, or has a health emergency while in the elevator:

- An emergency pull cord that will immediately summon help. This can be reached even if a resident has fallen to the floor.
- An alarm bell that makes a loud noise to attract attention of persons in the vicinity.
- A telephone and posted directions are installed.
- In an electrical outage, the elevator will automatically go to the lowest floor and the doors will open.

10. Weather Safety

a. Weather and Emergency Information

Residents can subscribe to a free community wide emergency information system (alertrockbridge.com) that sends all types of emergency information to Lexington residents. The messages can be received by your cell phone, or by email. etc. Kendal may use the SARA system with an automated message to communicate emergencies.

Another excellent information source is the radio broadcast from the National Weather System (NWS). A special “weather alert radio” will continually monitor the NWS broadcasts and alert listeners of impending dangers. The weather alert radio has a battery backup and will operate during a power failure. Local stores sell these radios.

b. Emergency Generators

Kendal has multiple emergency electrical generators. During an interruption of normal service, they will provide power to critical systems:

- Exit signs in Anderson, Webster and Borden Centers
- Emergency lighting in Anderson, Webster and Borden Centers
- Fire detection and alarms in Anderson, Webster and Borden Centers
- Limited food preparation and refrigeration equipment
- Medical systems in the Borden Center
- Two elevators in Anderson Center; the main elevator that is near dining and the South Terrace elevator at the far end of the South Building.
- Lighting and air-conditioning in Borden Center
- North Wing (Cox), Webster Center, food preparation and dining areas
- Some areas for temperature control (A/C as well as heat)

c. Snow Removal

When the snow reaches two inches, the Kendal snow removal process will begin. Snow removal is prioritized as indicated below:

- Main roads (Kendal Drive and Springlot Drive) and staff parking lots.
- Entrance to Anderson, Borden and Webster Centers.
- Entrance to South Apartment Building.
- Resident parking lots.
- Secondary roads (Sycamore Lane and other roads).
- Sidewalks and driveways.

d. Hurricanes, High Winds, etc.

If adverse weather conditions are forecast or are apparent, keep abreast of the situation. Secure outdoor items. Keep a flashlight handy as well as a battery or self-powered radio.

- **Cottages.** Seek shelter in a bathroom or corridor away from windows.
- **Apartments.** Seek shelter on the ground floor in a bathroom, stairwell, or corridor away from windows.
- **Anderson Center.** Seek shelter in public restrooms on interior corridors that are away from windows.
- **Borden Center.** Seek shelter in the corridor near the Team Room away from windows and/or doors.
- **Webster Center.** In the main desk area, seek shelter in adjoining rooms without windows. In other locations, seek shelter in the laundry room, public restrooms, bathing room, interior corridors or resident bathrooms.

11. Emergency Readiness.

a. Preparing Makes Sense for Kendal Residents

The Office of Emergency Management, County of Rockbridge, has guidelines for citizens to use. See their website at www.co.rockbridge.va.us/departments/oem for additional information. Kendal works closely with them and has created and maintains a Kendal Emergency Preparedness Plan following the national and state guidelines for best practice. The likelihood that you will recover from an emergency tomorrow depends on the preparations done today.

b. Basic Kit of Emergency Supplies.

FEMA provides complete information in “Preparing Makes Sense for People with Disabilities and Special Needs” pamphlet (FEMA R-6 / Catalog No. 09077-4). See www.ready.gov. FEMA recommends the following:

- Water, one gallon per person per day for at least three days
- Food, at least a three-day supply of non-perishable food and a can opener.
- Radio: battery or hand cranked
- Flashlight and extra batteries
- First aid kit
- Daily medicines for at least a week
- Pet food, extra water and supplies for your pet/service animal

Also consider the following:

- Cash/Credit Card
- Duct Tape
- Sturdy Shoes
- Other needs: adult diapers, copies of prescriptions, hearing aid batteries, spare wheelchair battery, spare eyeglasses or other physical needs

12. General Safety and Security

a. Extermination Service

Extermination is rendered by contract for roaches, rats, mice, termites and other vermin only. The treatment of normal household pests, i.e. ants, flies, etc., is the responsibility of the resident. If you have a problem that you believe is beyond your control, contact maintenance. If extermination services are required as a result of your pet, you will be charged a fee.

b. Walkway Obstructions

It is important to keep a safe, clear walkway in front of residences. Walkway obstructions are particularly hazardous in snowy, breezy or rainy weather and may interfere with snow removal. Exceptions to this guideline must be approved by the Director of Operations.

c. Personal Property

Kendal is not responsible for loss or damage to your property due to theft, fire, or any other causes. You are urged to maintain suitable insurance against such risks and to place valuable documents in a safe deposit box.

d. Solicitation

Kendal does not permit solicitation within the community. Delivery persons and sales persons are not permitted to call upon you unless you have specifically authorized such a call.

B. Anderson Center

This area is the center of community life at Kendal. Many activities and services are located here. Administrative offices are located just behind the reception desk and Marketing Offices located next to Kendal Hall

1. Reception Desk (463-1910) and Related Services

The reception desk is staffed on weekdays from 8:00 a.m. to 4:30 p.m. Residents, on a voluntary basis, greet visitors on weekends. New residents quickly realize that this is one of the best places to get information or find answers to their questions. The Receptionist is prepared to assist residents as follows:

- a. Communicating with the Staff.** If you have letters or messages for staff, you can deposit them in the staff mail box located beside the reception desk. If you would like to make an appointment to see administrative staff, the Receptionist will assist you.
- b. Mail.** The Receptionist assists with both the mailing and delivery of packages and has a limited supply of stamps for purchase. For those with mailboxes in Anderson, the Receptionist also arranges for the oversight of your mail while you are away.
- c. Forms.** The Receptionist has copies of the following forms and publications:
 - Values and Practices
 - Resident Newsletter
 - Quarterly Marketing Newsletter
 - Webster Center and Borden Center Activities Calendars

- Borden Center Brochure
 - Weekly Menus
 - Pet Registration
 - Absences from Kendal Overnight Form
 - Work Order Request Form
- d. Locked Out of Apartment or Cottage.** You are encouraged to leave an extra key with a friend or neighbor, in case you are locked out. If you cannot locate a key, see the Receptionist. If the Receptionist is not available, the staff at Borden Center will assist you. If you wish to request an extra key, contact the maintenance staff.
- e. Absences from Kendal – Overnight.** If you plan to be away from your residence at Kendal overnight, you will need to provide that information as early as possible, and at least 24 hours before departure, for correct SARA system monitoring. The preferred method is electronically, using the email address AwayList@kalex.kendal.org. You may also fill out an “Absences from Kendal Overnight” form, available from the receptionist. The form should be returned to the receptionist when completed. For more information about the SARA system see section V.I.1.

If you make last minute plans after 5:00 p.m. or on the weekend, turn the form in to a Kendal employee at the Webster desk. It should never be left on a desk or put into a drop box.

If you are away overnight due to a medical emergency, it is important for Webster Center to have this information as soon as practical.

- f. Guest Accommodations.** Five guest rooms are available at Sunnyside House for a fee. Contact the receptionist for reservations and instructions on obtaining keys. To help accommodate overnight guests in residences, a limited number of rollaway beds and linens are available through housekeeping. To obtain a rollaway, please call the receptionist between 8:00 a.m. and 4:30 p.m. Monday through Friday prior to the arrival of your guests. Pets are not permitted at Sunnyside House.
- g. Notary Public.** The Receptionist can advise you about available notary public services which are offered free of charge.
- h. Kendal FAX.** There is a facsimile machine in the administrative office near the Anderson entrance. The Receptionist can assist you with fax services.
- i. Dry Cleaning Service.** A local dry cleaner picks up and delivers cleaning for residents on a semi-weekly basis. Items to be cleaned may be left in the coatroom near the Anderson entrance. The Receptionist will provide details about how to arrange for this service.

2. Kendal Hall

Many Kendal activities take place here. There are moveable chairs, a sound system, audiovisual equipment, a baby grand piano, and darkening blinds – all provide flexibility for both small and large events. Reservations for use of this space can be made with the

Administrative Assistant in Dining Services who will also advise you about procedures for use of the audio-visual equipment and for catering.

3. Tutwiler Library

The Tutwiler Library is open 24 hours a day for use by all residents and staff. A diagram indicating the location of specific genres (fiction, history, biography, etc.) is at the Main Library Desk. In addition, there are signs indicating the location of magazines, DVD's and CD's, as well as crafts, cooking and Children's Literature. Check out materials by signing a book at the Library Desk.

Returned books should be left on the designated table in the *Mystery Nook* in the main library, not shelved. However, books do not have to be signed out from the satellite bookshelves in the Halls, (Cox 1 and 3, South Hall 1,2, Ground, and Terrace). *Take a book, return a book*. Books may be added to the shelves in these halls by the residents themselves.

Kendal's library cannot add every donated item to its collection. Materials not added to Tutwiler are usually placed in the library's regularly scheduled book sales, the proceeds from which help purchase memorial books and help defray some of the library's operational expenses. Every donation to our library is greatly valued and will be handled in the way the Library Committee feels will most benefit everyone who uses our Kendal Library.

Book donations, limited to no more than five at a time, should be placed on the table in the *Mystery Nook*.

A low-vision reader is located near the Periodical Room.

The Library Committee purchases books in memory of deceased residents and identifies them with "M" on the spine and bookplate inside the front cover.

Library holdings are listed on the computer as well as in a binder on the Library Desk. Residents needing access to the Internet may use the Library's Computer if it is available. Ask at the Reception Desk for the password.

4. Residents Association Information

The Residents Council bulletin board is on the wall in the Alcove. Postings include information about the Residents Association (e.g., the names of Council members and committee conveners).

5. Mail and Mail Boxes

Your U.S. Postal Mailing address is:

Your Name
160 Kendal Drive, Apt. # ____
Lexington, VA 24450

Or for cottages on Sycamore Lane:

Your Name
(#) Sycamore Lane
Lexington, VA 24450

Or for cottages on Sunrise Ridge Circle:

Your
Name
(#)
Sunrise Ridge Circle
Lexington, VA 24450

- a. **Resident Boxes - for internal mail.** There is an open message box for each apartment and cottage. These boxes provide a handy way to communicate with other residents. However, the boxes are not to be used for the dissemination of “junk mail” – *e.g.*, unsolicited political, charitable, or religious information. It is also against Residents Association guidelines to place solicitations in the open boxes. Each resident should be careful to take mail only from his or her own box.
- b. **U.S. Postal Mail.** All residents, except for those on Sycamore Lane and Sunrise Ridge Circle, have locked mail boxes that can be opened with residence door keys. There is a slot near these boxes for outgoing mail, which is picked up after the incoming mail has been distributed. Sycamore Lane and Sunrise Ridge Circle residents must make arrangements with the Lexington Post Office to “hold” their mail when they are to be away. Other residents can make arrangements with the receptionist to “hold” their mail.

6. Bulletin Boards

a. **Main bulletin board** is located between the U.S. postal mail boxes and resident boxes. Marketing posts information about move-ins of new residents and try-it guests staying at Sunnyside. Notices posted are timely and meant to cover events no more than three days before they will occur and are taken down immediately afterwards. News of immediate interest, along with unexpected schedule changes, is also posted on that bulletin board. It is kept current as possible.

b. **Alcove bulletin boards** are in the alcove across from the beauty shop. Those bulletin boards cover:

- **Fitness information and activities**
- **Directories and Information** – general information of interest to Kendal residents, i.e. scams targeting the elderly, natural gas leaks and what to do, etc.

- **Transportation Information-**
- Daily Bus Trips; shopping bus sign-up sheet
- Information on how to schedule Kendal transport to medical appointments
- A list of residents willing to drive others to health-related appointments
- Information on the Rockbridge Area Transportation System, Inc. (RATS)
- A list of private commercial drivers and taxis is available for nearby or out-of-town travel such as airports, Amtrak stations. Instructions on how to arrange for transportation for out-of-town medical appointments can also be found there.
- **Community Events and Opportunities**
- **Activities at Kendal**

c. Bus Trips bulletin board located at the top of the stairs leading to The Dining Room provides a sign-up for Culture and Entertainment events that will take place off-campus – VMI, W&L, and other Rockbridge County locations. Buses are also available to take residents to polling places on election days.

d. Culture and Entertainment Events bulletin board is located to the right of the U.S. Postal mail boxes. Movie information is posted there as well as other C & E notices.

e. Residents Council bulletin board is in the Alcove. The bulletin board provides information regarding officers and members of the Residents' Council; members of the nominating committee; standing committees – members, chairmen, and meeting times. Minutes of the Council and the Association are posted as well as Association goals. Sunnyside House and Kendal Hall guidelines can also be found on that bulletin board.

Residents are urged to check the bulletin boards regularly.
This is the easiest way to keep up-to-date on Kendal news and activities.

7. Death of a Resident

When a Kendal resident dies, Staff will offer sympathy, support and assistance to the spouse and/or family of the resident. Staff, at the discretion of the family, will place an announcement and/or framed picture on the library table in Anderson Hall, near the resident mailboxes. An email will be sent to all Kendal residents with notification of a death.

8. Beauty and Barber Shop

On the second floor, between Anderson Center and Webster Center, Lisa's at Kendal provides hair care for men and women. Call Lisa's at (540)570-7217 or the Kendal Beauty Shop at 464-2615 for information about schedules and appointments.

9. Alcove

Copying and shredding equipment for resident use is in the alcove across from the Beauty Shop. Instructions for using the equipment are posted there. Copies made for personal use are 5¢ per copy. The alcove also provides bins for specialized recycling (e.g., batteries and printer cartridges) in addition to the bulletin boards described above.

10. Banking Services

Cornerstone Bank offers a range of banking services to residents every Wednesday morning from 10:00 a.m. until noon. Bank representatives use space near the Administrative Offices and Mailboxes. Look for the Cornerstone Bank sign to guide you.

C. Sunnyside House Guidelines

General

1. The operation and control of Sunnyside House are vested with the Executive Director of Kendal at Lexington. She or her designee will schedule Sunnyside House, assign rental rates when applicable, and exercise control in accordance with policies and rates established by the Board of Directors. The Executive Director has full authority to either revise or waive the scheduled fee requirements in any given case for which she judges it to be in the best interest of Kendal at Lexington and consistent with Kendal's mission to be a charitable, not-for-profit, member of the larger community.
2. Inquiries and reservations for the use of Sunnyside House may be made at the reception desk in Anderson Center, phone 540-463-1910. The reception desk is staffed Monday-Friday, 8:00 a.m. to 4:30 p.m. For last minute reservations on the weekend, residents may contact the Sunnyside Hospitality Committee, phone 540-463-5659.
3. Reservations for guest rooms will not be taken more than six months in advance.
4. Reservations for special events will not be taken more than one year in advance.
5. Sunnyside House is a non-smoking and no pets guest facility. Exceptions are made for seeing eye/service dogs but a charge of \$25 is added to the room rate. Guests are asked to notify the receptionist when bringing in a service dog so that extra cleaning can be done for the comfort of all subsequent guests.
6. Kendal at Lexington staff may use vacant guest rooms with permission from their supervisor, upon declaration of a weather emergency.
7. Housekeeping staff make beds daily and pick up towels daily. For extended stays, bed linens may be changed after three days.
8. To protect and preserve the old floors and doorframes, power chairs and scooters are not permitted inside Sunnyside and must be parked outside. Push chairs are stored in the back hall for the convenience of guests needing them.

Guest Room Use

1. There are five guest rooms on the second floor that may be reserved by residents, staff or board members by calling the reception desk. Rental rates plus taxes, as listed below, include a full breakfast in the Main Dining Room. Payments may be made by check, cash, credit card (if presented during office hours) or charged to a resident's account. The invoice is presented with the key. Guests are given the keys to open the room and to unlock the front and side doors of Sunnyside House. Parking is available in the area adjacent to the elevator at Sunnyside House or in the front circle.

Handicapped-accessible Guest Room 200

\$105 plus taxes for up to 2 people; \$20 each additional person; children 12 and under free

King size bed and double bed

Handicapped-accessible /guest Room 201

\$105 plus taxes for up to 2 people

Double bed

Guest Room 202

\$105 plus taxes for up to 2 people; \$20 each additional person; children 12 and under free

King size bed and double bed

Guest Room 203

\$105 plus taxes for up to 2 people; \$20 each additional person; children 12 and under free

King sized bed and double bed

Guest Room 204

\$105 plus taxes for up to 2 people; \$20 each additional person; children 12 and under free

Two double beds and a queen-size sofa

2. Kitchen: Overnight guests may use the kitchen. The kitchen is supplied with a four-burner stove with oven, a refrigerator, a microwave, coffeemaker along with tea and coffee supplies, and basic dishes, cutlery, and glassware for approximately 30 guests.
3. Fitness Center: guests of residents are permitted to use the Fitness Center from 7 a.m. to 10 p.m. if they are accompanied by the resident they are visiting. The guest and resident must sign a guest waiver prior to using the facility. The waivers are located on the brochure rack in the Fitness Center hallway. Return the completed form to the mailbox located on the door of the Fitness Center office.

First Floor and Terrace Use

1. Members of the Kendal at Lexington community may request use of the first floor of Sunnyside House by calling the Dining Services Administrative Assistant at 464-2631 to make a reservation. In general, there is no charge for the use of the first-floor rooms by Kendal residents and their personal guests when no set-up of furniture/equipment by Kendal staff or catering is required. Otherwise, a \$50 deposit, paid by the resident, is required. The deposit is refundable if the rooms, furnishings and equipment are in satisfactory condition after the event, according to the checklist in the kitchen. If set-up is requested, a minimum set up fee of \$20 is also required, which is nonrefundable. Rooms not reserved are open for informal resident use with the expectation that residents are responsible for keeping the areas tidy. Rooms on the basement floor are available for resident use whenever Sunnyside House is open, generally 7 a.m. to 10 p.m.
2. The maximum number of people permitted inside Sunnyside House is 100. Groups of more than 100 persons will be required to make use of the outdoor patios and porches for receptions, etc. in order to augment the indoor space. Such groups will also be required to arrange for an alternative date or a definite rain plan location. Large numbers will not be permitted to use Sunnyside House when bad weather conditions prevail or seriously threaten. If available, groups may use Kendal Hall as an alternate location.
3. Rental rates for groups or individuals other than Kendal residents' personal and approved uses are listed below. The rental rate includes a set-up fee and damage deposit. The damage deposit will be refunded if the facility is returned to the same condition in which it was found. Reservations must be made seven days in advance. Cancellations made less than 48 hours in advance will lose the damage deposit.

\$150 (includes \$50 damage deposit) – not-for-profit groups or individuals utilizing the Great Room, Dining Room, or Parlor. The kitchen is available when any one of these rooms has been rented.

\$250 (includes \$50 damage deposit) – for-profit groups utilizing the Great Room, Dining Room, or Parlor. The kitchen is available when any one of these rooms has been rented.

\$300 (includes \$100 damage deposit) – not-for-profit groups or individuals utilizing entire first floor and terrace.

\$500 (includes \$100 damage deposit) – for-profit groups utilizing entire first floor and terrace.

4. Catering: when catering is required, Kendal Catering must be given the right of first refusal. Outside caterers must be approved by the Executive Director or her designee. For catering requests, contact the Dining Services Administrative Assistant at 464-2631. Catering fees including room rental will be determined through Dining Services.

D. Resident Activities

Life at Kendal can be quiet and restful, or it can be filled with activities – it's up to you. Following the Kendal tradition, residents organize all aspects of the social, cultural, intellectual and spiritual life of the community. (*Values and Practices*, page 7). This is done through committees and interest groups that form as new ideas are presented and new projects are initiated. All residents, especially new residents, are encouraged to make suggestions and share their ideas. Your challenge will be to keep up with all the activities that are scheduled. Watching the bulletin board and reading the Newsletter will help you to keep informed. Committee members and interest group conveners can provide detailed information about the activities that are scheduled. Here's a partial list; these are only examples.

1. Athletic and Outdoor Activities

- Table tennis in fitness center on weekends.
- Walks on the Kendal trails and walkways. Some benches are placed along the trails.
- Exercise in the fitness center. Appropriate and safe equipment is provided.
- Water exercise and therapy.

2. Community-Wide Activities

- Tuesday Conversation Hour, 5:00 to 6:00 PM – a popular event.
- "Men Only Breakfast" – first Monday of each month
- Monday and Thursday movies after dinner
- Special events – music, lectures, talks, holiday programs, special celebrations.
- Kendal College – resident sponsored educational opportunity

3. Interest Group Activities

- Bible Study

- Bridge
- KALEX Publication
- Kendal Singers
- Model Railroad
- Photography Group
- Poetry Group
- Recorder Group
- Sewing Circle
- The Art Gallery
- Woodworking Shop

4. Volunteer Activities at Kendal

- Some residents enjoy assisting at the Webster or Borden Centers. Contact the Resident Life Coordinator at 464-2627 if you would like to volunteer.
- Some residents assist with marketing by covering the reception desk on weekends, helping with guided tours, and meeting prospective residents.
- You may also see residents busy doing such things as working on trails and landscaping, carrying meals to residents unable to go to The Dining Room, providing rides to medical appointments, setting up for movies, and, of course, going to committee meetings.
- Regularly new opportunities arise for residents to assist each other and the Kendal community. If you are able and interested, do not hesitate to volunteer.
- You may also be interested in volunteering in activities beyond the Kendal community, as many residents do. Volunteer opportunities may be posted on the alcove bulletin board. Residents who lived in this area before moving to Kendal will be able to tell you more about these opportunities.

5. Off-Campus Activities

The nearby Lexington community offers a wide range of opportunities to Kendal residents. These are easy to get to either by driving or by using the Kendal bus. Trips beyond the Lexington area, planned by the Culture and Entertainment Committee, have been popular with residents and have included picnics at Peaks of Otter, music at Garth Newel, mineral baths at Warm Springs, Shakespeare at the Blackfriars Theater in Staunton, and visits to Natural Bridge and Safari Park.

E. Financial and Legal Matters

1. Monthly Invoices

Monthly statements are placed in resident message boxes at the beginning of each month. They include the monthly residence fee, to be paid in advance, and other items, such as beauty and barber shop charges, food service charges, and covered parking charges. See the billing coordinator or Chief Financial Officer if you have questions about these statements. Payment can be made by check or automatic withdrawal from a resident's checking or savings account. See the Business Office for details.

2. Purchases – from Receptionist

You can purchase postage stamps from the Receptionist and pay for photocopies made on the administrative copy machine.

3. Tax Information – Medical Expenses

As a Kendal resident, a portion of your Entry and Monthly Fee can be considered pre-paid medical care and may be deductible from your Federal Income Tax, according to Internal Revenue Service ruling 76-481. By January 31st of each year you will be provided with a letter stating the portion of your monthly fee deemed medical.

4. Tax Information - Contributions

If you have made contributions to Kendal, a not-for-profit 501 (c)(3) organization, you will be provided with appropriate tax documentation.

5. Residents Association - Finances

No assessment may be placed on members of the association: all contributions are voluntary and are not tax deductible.

6. Resident Information Form

It is very important for you to keep up-to-date the Resident Information Form that you completed when you came to Kendal. This is the form that includes certain legal information as well as information in case of emergencies or death of a resident. Let the Clinic Nurse know of any changes so they may be included in File of Life updates.

7. Gifts to Staff

No employee may accept a gift, gratuity or favor directly from any resident or resident's family. Acceptance of personal gifts of money, gift cards, or other items by an individual employee is never permissible. If a resident or family member is persistent in their desire to give a gift or gratuity, the employee should refer the resident or family member to their department head, the Executive Director or the Director of Human Resources. Gifts such as cookies, candy, fruit baskets, flowers, etc. which are given to individual departments (example: nursing staff of Borden) may be accepted if they are of nominal value (less than \$100). All such gifts will be placed in an area where all employees will have access. This policy is strictly enforced. Staff members can be discharged for violating the Gifts & Gratuities Policy. Your cooperation is requested.

Your appreciation of staff can be expressed through the Staff Appreciation Fund which is a tax-deductible contribution to Kendal. Solicitation to raise funds occurs twice a year by the Resident Council. Employee gifts or gratuities solicited by the Kendal Resident Council, through the Staff Appreciation Fund, do not constitute a violation of this policy.

8. Private Hiring of Staff

Residents may not hire staff members for private projects.

9. Local Services

Residents seeking legal and/or financial services are encouraged to talk to other residents, not staff, about the services available in the Lexington area.

10. Wallet Cards

It is suggested that you make photocopies (both sides) of credit, ID, and health insurance cards that you carry in your wallet. If credit cards are lost or stolen, cancel your cards immediately.

11. Voting

The Rockbridge County voter registration office is at 150 S. Main Street. You can register to vote there or at the DMV office when getting your driver's license. The Kendal bus makes several runs to the Rockbridge County voting location on Election Day. Residents living in cottages 1007 and 1008 and on Sunrise Ridge Circle are city residents and vote in the city of Lexington. The city's voter registration office is at 300 East Washington Street in Lexington.

12. Health Insurance Card

Please provide the Clinic Nurse with a copy of your health insurance card if you change companies.

13. Independent Residents Rights

The Residence and Care agreement outlines independent residents' rights and responsibilities.

14. Compliance and Privacy

You should call the compliance line any time you are aware of an illegal, irresponsible or ethically questionable situation and feel you cannot go to the management of Kendal at Lexington. You may call the compliance line (1-800-211-2713) anonymously 24 hours a day, 7 days a week, 365 days a year.

15. Wills and Other Legal Non-Medical Directives

Please provide the Clinic Nurse with a copy of any wills or other non-medical legal directives if you wish them to be kept with your medical record.

F. Dining Services

Dining Services offers a variety of options and services to the residents. Whether it is breakfast, lunch, or dinner in the main Dining Room, a meal in the full-service restaurant, or catered services to accommodate a special event, the goal is to provide quality meals and service.

- 1. The Dining Room** is open seven days a week and features hot entrees from the buffet line, specialty salads, made-to-order foods from the grill, and a bountiful dessert station. Wait staff are available to accommodate resident's requests while dining.

Reservations should be made when inviting guests (non-Kendal residents) to the Dining Room. It is requested that 24-hour notice be given when possible by calling the Dining Room at 540-464-2619.

Hours of Operation

7:30 a.m.- 7:00 p.m. Monday through Saturday

7:30 a.m. – 6:30 p.m. Sunday

Full Menu Availability

Monday through Saturday

Breakfast: 7:30 a.m. – 9:00 a.m.

Lunch: 11:30 a.m. – 1:00 p.m.

Dinner: 5:00 p.m. – 7:00 p.m.

Sunday

Breakfast: 7:30 a.m. – 9:00 a.m.

Lunch: 12:00 p.m. – 1:15 p.m.

Dinner: 5:00 p.m. – 6:30 p.m.

Soups, salads, made-to-order foods and grab & go items available all day.

- 2. The Restaurant** at Kendal is a full-service fine dining venue offering a seasonal menu including weekly specials. The Restaurant is open Wednesday through Saturday evenings from 6:00 p.m. until 7:30 p.m. Reservations are required. Reservations may be made in advance but must be made by no later than 3:00 p.m. the day you plan to attend, providing we can accommodate you. The Restaurant reservation number is 540-458-3784.

- 3. The Point of Sale System** is designed to track resident meals and charges. Residents are issued a card that can be used for meal accounting. These cards have a barcode unique to each resident. If a card replacement is needed, contact Dining Services at 540-464-2631.

- **Cash, credit cards and Checks are accepted in the Dining Room**

4. Services Offered

a. Catering Service is available for a variety of special occasions. Contact the Dining Services Administrative Assistant at 540-464-2631 to plan the event.

b. Holiday meals are a festive occasion at Kendal. Since holidays are a favorite time to invite guests to the Dining Room, reservations are required for Residents and guests. Dining services will post reservation information in advance of these meals.

c. Take-Out Meals are available from the Dining Room.

d. Box Lunches are available for carry out. This option can be considered when planning outings or bus trips.

e. Meal Delivery/Tray Service can be provided to you in your residence or the Webster Center during a short-term illness after authorization from your doctor, the Clinic Nurse or Director of Resident Services.

f. Wine and Beer are available for purchase in the Dining Room and The Restaurant. Personal alcoholic beverages may not be brought into the dining areas.

5. **Weekly Menus** for the Dining Room may be obtained by email or by acquiring menu copies that are placed at the internal resident mailboxes.

6. **Special Dietary Requirements:**

For special dietary requirements, residents are encouraged to meet with the Director of Dining Services to plan how best to meet your special dietary needs.

7. **Dining Points-Program Basics**

Independent living residents have a meal plan which allows each resident to purchase food items (including wine) from the Dining Room, the Restaurant and the Kendal store. Each resident is allocated 300 dining points per month to pay for these purchases. A resident may use these points to:

- Purchase their own, their spouses or guests' food in the Dining Room and the Restaurant
- To purchase products from the Kendal store (see the current shopping list for items such as wine, beer, eggs, etc.)

Dining points are neither refundable nor transferable.

To ensure accurate dining accounts, residents are requested to present their dining key cards (fobs) to the cashier for scanning when making a food-related purchase.

All guests must be accompanied by the resident who uses his/her fob when buying food for that guest. **NOTE:** A resident may purchase food for their spouse and charge it to their spouse's account by giving the spouse's fob to the cashier. A resident may also pay for a spouse's food by telling the cashier to charge their own account and not the spouse's account. In the event that a resident is temporarily unable to come to the dining room for health reasons, a caregiver or family member may purchase food for the resident and charge it by presenting the resident's fob to the cashier.

There are occasions when residents do not use all their 300 points in the month. Residents may carry over a maximum of 300 unused points into the next month. No month can start with a balance of more than 600 points. Since any points over 600 will be automatically lost at the beginning of the month, residents are

encouraged to use these excess unused points for purchases from the Kendal store before the end of the month.

NOTE: Orders for Kendal store products must be placed by the 24th of each month and will be charged to the resident's account at time of pickup. If the order is picked up in the next month, that charge will move into the next month. For example, if you wish to use your points in October, then the order MUST be paid for and picked up in October. Dining points may not be used for catered events. However, dining points may be used to order from the catered items list as long as the trays are picked up from Dining and not delivered by the Dining staff.

If residents use all their allocated points before the end of the month, they may continue to make purchases, but charges will be added to their monthly financial statement.

In the event that an independent living resident temporarily moves to the Health Center (either Webster or Borden), the resident will be advised by Health Center personnel how charges for meals will be calculated. No additional dining points will be allocated to the resident's account, but the unused points already allocated are still available for purchases of food-related items.

In the event that an independent living resident permanently moves to the Health Center, Admissions personnel will advise the resident how charges for meals will be calculated.

When a resident permanently leaves Kendal, all unused dining points automatically expire.

Residents will receive a monthly statement of their Dining Point charges. Dining Points billing questions should be addressed to the Dining Administrative Assistant, not the Accounting Department.

8. Mobility Aids

- a. Scooters and power chairs may be driven into the dining facilities only by residents unable to park and walk to a table. There is a parking area for the scooter should the resident choose to sit in a regular chair. Staff can assist with retrieving the scooter or chair

when the resident is ready to leave. Power chairs may remain in The Dining Room if the resident cannot transfer to a dining chair.

- b. **Walkers** should be collapsed and placed flat against the wall.

9. Pets other than service animals are prohibited from dining rooms in accordance with Virginia State Law.

G. Wellness

1. Wellness Philosophy

Wellness is an active process of becoming aware of and making choices toward a balanced, healthy lifestyle.

We are committed to promoting the optimal well-being of each resident. Progress toward wellness is achieved by offering programs that facilitate awareness and improvement in these interrelated areas: Social, Physical, Occupational, Emotional, Spiritual, Intellectual, and Environmental. Programs and services are established and maintained by both residents and staff.

Vitalize 360 is a voluntary program offered at Kendal that combines wellness coaching to engage, challenge, and inspire older adults to live full, healthy, vibrant lives and enable communities to demonstrate significant improvement in successful aging. Residents have opportunities to share what is most important, set goals and focus on living more intentionally. A team of staff members who routinely interact with residents is critical to the success of the program. Vitalize 360 helps our community move from “what’s the matter” to “what matters most”.

2. Health Education Programs

The Wellness Committee plans and coordinates health education programs that both inform and encourage residents to take an active role in their health and well-being. Residents are encouraged to let the Wellness Committee know of topics of interest.

3. Fitness and Exercise Programs

Residents are encouraged to take advantage of the numerous and diverse opportunities that are offered at Kendal. There are programs to accommodate a wide range of abilities and needs. Residents should have a health screening and/or a physician clearance prior to beginning a fitness or exercise program. Residents should also complete an orientation with the Wellness Coordinator to assess needs.

4. The Fitness Center

a. Fitness Equipment Room

- Includes a resistance training circuit, cardio equipment, and weights.
- Prior to using the equipment, residents must complete an orientation with a fitness staff member.
- A keypad lock is on the door entering the equipment room; the code is given after completing the orientation to ensure safe and effective use of equipment. Residents should not share the code.
- Hours of use are between 5AM and 10 PM.
- Residents should use the sign-in sheets to help track usage and attendance.

- Guests of residents are permitted under the supervision of their acknowledging resident, after signing a waiver once a year.
- Residents should wear their PET's while using the equipment room.
- For health and safety reasons, there is a no pet policy for the Fitness Center.
- Individualized fitness programs can be developed by making an appointment with the fitness staff.

b. Swimming Pool

- Indoor, 50x25 foot pool that is appropriate for a variety of uses including lap swimming and aquatic exercise.
- Equipped with a handicap accessible chair lift.
- Water temperature is kept at approximately 87 °.
- A "buddy" system is strongly recommended; another able-bodied adult should be present while using the pool.
- A keypad lock is on the door entering the pool; the code is given after completing the orientation to ensure safe and effective use of the fitness area. Residents should not share the code.
- Residents and guests should use sign-in sheets.
- All guests must be accompanied by a resident and sign a waiver prior to using the pool.
- Shower and changing rooms are in the locker room.
- Shower and removal of make-up is required before entering the pool.
- PET's, hearing aids, and contact lenses should be removed before entering the pool.
- No food or drink is permitted in the pool area.
- Towels are provided.
- Appropriate cover-up and shoes must be worn outside of the pool area.

c. Group Fitness Classroom

- Used for group exercise, wellness events, and individual use.
- Equipped with a cushioned floor that is ideal for a variety of activities.
- Fitness equipment is available for both class and individual use.

d. Massage Services (as available)

- Available to residents and their guests.
- Appointments and fees are set by massage therapists.
- Information available at the Fitness Center.

5. Fitness Classes

- A variety of group exercise classes are offered weekly.
- Classes are designed to accommodate a wide range of abilities and needs.
- Class schedules and descriptions are available at the Fitness Center and on the Health and Fitness Information bulletin board in the 2nd floor alcove.

6. Senior Fitness Testing

Senior fitness testing is offered annually as part of the Wellness program. Residents are given an opportunity to assess their functional fitness level through a set of easy and safe tests. Tests are designed to measure strength, flexibility, aerobic endurance, agility and dynamic

balance needed to perform everyday activities. Height, weight, and BMI are measured as well as blood pressure and heart rate. Testing provides a baseline fitness level and a manner in which to track progress.

H. Medical Services

1. Clinic Services

The Resident Clinic offers:

- Evaluation and management of acute illness and injuries (e.g. colds, and various other infections and illnesses, injuries) and first aid
- Management of chronic illness or disease (e.g. diabetes, congestive heart failure, vascular disorder, COPD)
- Routine exams and ear cleaning
- Specialty wound care
- TB screening; annual flu and pneumococcal vaccines; B12, allergy, and other injections
- Medication reviews, blood pressure monitoring, preventative health care management and case management as needed
- Individual and group education
- Home visits as needed
- Specialists are occasionally scheduled, check the Clinic bulletin board for details.

Clinic Hours are Monday through Friday 8:30 a.m. – 5:00 p.m. and “walk-in hours” are 2:00-3:00 p.m. Monday, Wednesday and Friday. Call the Clinic Nurse (464-2609) if you would like to schedule an appointment. If your physician would like to visit you at Kendal in the clinic, call the Clinic Nurse to schedule time in the clinic.

Kendal contracts with a Medical Director, Alfonso Brochero, M.D., to oversee the Borden Center, as per Medicare/Medicaid guidelines. Dr. Brochero has another physician on staff, Dr. Aros, and a Nurse Practitioner. One of the medical staff are onsite at Kendal 4-5 days/week, generally M-F, early morning hours. By calling Cathy Lewis or the Borden Center, Kendal residents may arrange to be seen in the clinic. They will bill the resident’s Medicare/insurance, just as the Primary Care Physician would do. Generally, residents can be seen for an issue when they are unable to get in to see their Primary Care Physician.

The health services bulletin board is located outside of the clinic and is a useful source for current information on a variety of health topics.

a. **Emergency First Aid Services**

If you need minor emergency first aid services, and the Clinic Nurse is unavailable, the Borden Center staff can assist you. If you feel that you need immediate 911 services, please call them and use your PET, or pull an emergency cord to alert Kendal staff.

b. **Laboratory Services**

Laboratory services are available at Kendal on Wednesday (except holidays) at 7:00 a.m. Apartment and cottage residents need to obtain a written prescription from a physician and bring it with them.

c. **Meal Service/Tray Service**

If you are ill and need meal trays delivered to your home, you may request them through the Clinic Nurse or Resident Services during the week and from Borden during evenings and weekends or when the Clinic Nurse or Resident Services is unavailable. Meal tray delivery is intended only for short-duration illnesses, or mobility issues.

d. **Home Health Services**

The Clinic Nurse or Resident Services should be notified when home health services are required and/or ordered by a physician. These services may be covered under Medicare or your supplemental insurance if certain conditions are met.

e. **Medical Equipment**

Residents may be eligible for insurance coverage of certain medical equipment in your own home. Equipment may include specialty beds, walkers, scooters and other assistive devices. To learn more about medical equipment or to discuss your needs, contact the Clinic Nurse or Resident Services.

f. **Immunizations**

Annual flu vaccines are typically available at Kendal from late October through March. Notices and sign-up sheets are posted in early October. Contact the Clinic Nurse for further information.

g. **Psychiatric Services**

Kendal contracts (currently with Lewis Gale) to provide all residents (in Borden, Webster and independent living) with psychiatric services. For more information contact Resident Services or the Clinic Nurse.

2. File of Life

Every new resident reviews File of Life information with the clinic nurse within the first thirty days of moving in. The new resident is expected to complete the File of Life information form and return it to the Clinic Nurse as soon as possible after moving to Kendal. The information from this form is then entered into the File of Life database. Two copies of the personal database printout are returned to the resident along with the red File of Life magnetized pocket which should be attached to the side of the resident's refrigerator.

The File of Life includes all emergency contact information, medications, food and medication allergies, insurance information, and other personal and medical data pertinent to expediting prompt and appropriate emergency medical care.

It is extremely important to notify the Clinic Nurse if you have or when you acquire a 'Do Not Resuscitate' order from your physician. The Clinic Nurse will assist you by assuring that you have the proper legal document included in your File of Life so that emergency responders can honor your wishes.

The Clinic Nurse distributes a reminder to residents to review and submit updates to the form twice a year, but updates are accepted at any time. There is no fee for this service and resident involvement is essential to maintaining accurate and up-to-date File of Life records.

3. Advance Directives, Living Wills and POA'S (Power of Attorney)

So that staff can respond appropriately in resident health emergencies, residents are asked to give copies of their Power of Attorney, Medical Power of Attorney or Healthcare Proxy, living will and/or advance directives to Kendal at Lexington staff. These documents are securely kept in the resident's file and are available to the medical staff. Your Kendal record can also reflect your end-of-life preferences for memorials or services, body or organ donation, etc. If changes occur to these documents or you have specific information to enter into your medical record, please inform the Clinic Nurse or Resident Services.

If you need more information on Advance Directives, Living Wills or POA's or on how to become an organ or body donor, contact the Clinic Nurse or Resident Services.

4. AED, CPR

Kendal has two Automated External Defibrillators (AED's) which may be used by staff in the event of cardiac arrest. If you have executed a DNR (Do Not Resuscitate) order, a copy of this document should be given to the Clinic Nurse so the form can be placed on your medical chart. A copy must be placed with your File of Life on your refrigerator to be honored by emergency personnel.

5. Therapy Services

- a. **Outpatient Therapy Program.** Outpatient occupational, physical, speech and aquatic therapy services are available at Kendal with a written order from a physician. For further information about therapy services, call Therapy Services at 464-2638. You are not required to use Kendal's Therapy Services.
- b. **In-Patient Therapy Services.** In-patient therapy services are offered in the Borden Center. It is likely that you may qualify for a short-term rehabilitative stay in the Borden Center following a hospital stay. Your needs will be reviewed by the Clinic Nurse in collaboration with the Resident Care Committee during and after any hospital stay. The committee may make recommendations based upon assessed needs during that review.

6. Hospital Stays

It is important for you to notify the Clinic Nurse or Resident Services of any hospital admission. While at the hospital, notify the hospital staff that you are a Kendal resident. The hospital discharge planners and Kendal staff will remain in close contact during your hospital stay to coordinate a discharge plan appropriate to your needs.

7. HIPAA

The Health Insurance Portability and Accountability Act of 1996 (HIPAA) has four primary objectives:

- Assure health insurance portability by eliminating job-lock due to pre-existing medical conditions
- Reduce healthcare fraud and abuse
- Enforce standards for health information
- Guarantee security and privacy of health information
- New residents are given a copy of Kendal at Lexington's Notice of Privacy Information Practices. Copies of the document are also available at the receptionist's desk and on the Kendal website at www.kalex.kendal.org

I. Personal Safety Measures

1. Electronic Life Safety Systems

a. SITUATIONAL AWARENESS AND RESPONSE ASSISTANT (SARA)

SARA is an alerting and monitoring system which enables our facility to monitor a wide variety of alarms such as: Pull Cords, Mobile Pendants (PETS), Door Entry, Motion Detectors, and Critical System Failures. It also monitors our fire system including smoke detectors and fire panels.

Many residents first encounter SARA when they hear her robotic voice on their telephone answering system. When residents fail to file an Away Notice or happen to sleep unusually late, this system detects the lack of motion in a residence and alerts staff to that fact. SARA telephones the resident to determine whether there is a problem. If there is no response to the SARA call or to a follow-up manual phone call, a staff member will be dispatched to the residence.

Note: Residents may also receive these SARA messages via text messaging only if you have made arrangements in advance with either the Receptionist or the Director of Operations.

SARA is not an early warning system. It will not automatically broadcast NOAA weather alert or Rockbridge County emergency services messages. It is tailored specifically to the Kendal environment. Kendal may use the SARA system to communicate automated messages during an emergency.

b. PETs (Personal Electronic Transmitters).

Similar to the Life Call system found in many towns and cities, PETs are devices kept by all residents to ensure the security of having another means to alert staff in the event of a fall or medical emergency. The PET is generally worn on a necklace, with a clip, or kept in a pocket or purse. When the button on the PET is pushed, Kendal staff receives a message on a pager that indicates who you are, your approximate location, and your telephone number and your code status (DNR, Full Code, etc.). PETS cover cottages, apartments and all common buildings as well as the exterior areas of the Kendal campus within 30 yards of buildings. If you are further away, it is wise to carry a cell phone in case of emergency. PETS will also work in the shower, though not in the pool. When a PET button is pushed, staff

will first attempt to contact you by telephone to get a description of your situation. Sometimes the PET has been accidentally activated and the initial telephone call from staff will alert you to this.

In the event of an emergency (or if no one answers your telephone or your telephone is busy) a nurse will respond to your location. The nurse will assess your needs, administer first aid or other medical assistance if necessary, call 911 if indicated, or advise you of what you can do to help yourself.

Kendal nurses cannot practice outside of their scope of practice. If the nurse assessment warrants that 911 is called, they are required to call 911 despite a resident declining the call.

All residents are assigned PETs on arrival and encouraged to wear them. Webster Center residents are always expected to wear a PET as the primary means for contacting Webster staff when assistance is needed. There is no fee for your first PET or a replacement in the event of a malfunction. A fee will be charged to replace a lost PET.

c. Emergency Pull Cords.

There are pull cords located in bedrooms and bathrooms in apartments and cottages to be pulled in emergency situations only. By pulling the cord, a signal is sent to Kendal staff, who will respond as described above.

d. Motion Detectors.

All cottages and apartments are equipped with motion detectors that electronically inform staff that residents are up and moving during the day. If motion is not detected between 6 a.m. and 9:45 a.m., and you have not informed us that you are away, staff will call you. If there is no response, they will enter your residence to check on you.

2. Powered Chairs and Scooters.

If you feel the need to use a powered chair or scooter to move around the community, you should consult the Clinic Nurse, before purchasing one, for Medicare guidelines and Kendal policy.

Policy on Powered Chairs and Scooters

It is a privilege and a responsibility to drive a powered vehicle in Kendal buildings and on the walkways. These powered chairs and scooters may be a necessity for a resident, but they are similar to any powered vehicle---they can seriously injure others if not properly operated. A resident thinking about acquiring a powered vehicle is encouraged to first consult with the Clinic Nurse.

- A physician's order is necessary for use of a powered vehicle at Kendal. The Clinic Nurse will assist in the process of obtaining the physician order.
- Vehicles are to be registered through the Clinic or Resident Services.
- To assure the competence of drivers, Therapy Services will perform an annual evaluation and a repeated screening as needed.
- When approaching individuals in the hallway, be sure that they are aware of you. If possible, detour around them.

- Slow down when approaching corners or corridor intersections. Watch for people emerging into corridors.
- Always use extra caution when driving in the Webster or Borden Centers. Many residents have impaired vision, hearing or coordination.
- To get an elevator, push the call button, then draw back a foot or two to permit those on the elevator to exit easily. When backing out of the elevator, be especially careful of those waiting to enter. Either the “call” button outside the elevator or the “open” button inside will hold the elevator.
- Park according to the severity of your disability and in the direction in which you will be leaving. Parking opposite the mailboxes is an appreciated courtesy.
- Scooters and power chairs may be driven into the dining facilities only by residents unable to park and walk to a table. There is a parking area for the scooter should the resident choose to sit in a regular chair. Staff can assist with retrieving the scooter or chair when the resident is ready to leave. Power chairs may remain in The Dining Room if the resident cannot transfer to a dining chair.
- By fire regulations, an eight (8) foot corridor space must always be maintained and cottage access cannot be impeded. Do not park near a fire extinguisher, fire alarm box, or fire doors. Consult the Director of Operations with any parking questions.
- When vehicle is not in use, always remove the key.

J. Webster Center and Borden Center

1. Moves to the Webster Center and Borden Center

- Short-Term Stays in the Webster or Borden Center.** The Webster Center and the Borden Center are available to residents should they need such assistance and care. The Resident Care Committee will work with each individual resident and their family to determine appropriateness for a change in level of care. A transition will require a physician’s recommendation and prescribed orders to occur. Services include assistance with activities of daily living or general nursing care, special diets and health services which regulations allow Kendal to provide. Payment terms for these services are set forth in the Residence and Care Agreement. It is likely that you may qualify for a short-term rehabilitative stay in the Borden Center following a hospital stay. Your needs will be reviewed by the Clinic Nurse and the interdisciplinary healthcare team during and after any hospital stay. The Kendal staff will work with you to develop a service plan that will enable you to return to the highest level of independence possible.
- Permanent Transfers to the Webster or Borden Center.** The decision regarding a permanent transfer to the Webster Center or the Borden Center will be made by Kendal’s Resident Care Committee, you and your family physician. Provisions will need to be made to remove your personal belongings from your apartment or cottage within 30 days of the transfer from independent living and 14 days of transfer from assisted living before the transfer is made permanent. Refer to your Residence and Care Agreement for further details. A member of Kendal staff will work with you and your family through the transition period.

2. Webster Center Services and Amenities.

The Webster Center provides assisted living services on the second floor of Cox Hall to 20 studio apartments. Below is a listing of the services and amenities available to Webster Center residents:

- Private studio apartment with private bath and kitchenette.
- Weekly housekeeping.
- Three meals a day served in The Dining Room (additional fee), plus snacks.
- Assistance with the activities of daily living which may include dressing, bathing, toileting, medication administration or reminders, transferring and other specified activities.
- Resident wellness and education programs.
- 24-hour staffing and emergency call system.
- Easy access to community activities, dining room.
- Individualized service plan.
- Access to the Tutwiler Library.
- Access to the pool and fitness center.
- Periodic health assessments that may include blood pressure checks and medication reviews.
- Laundry service available for a small fee (no ironing or mending is included in fee).
- Access to onsite pickup and delivery of dry cleaning.
- Staff assistance with arrangements for transportation to local appointments. Staff do not accompany the resident unless required at which time a fee will be assessed for staff time.
- Staff assistance with scheduling appointments on-site and off-site.
- Programs and life-enriching activities based on individual preference.
- Wheelchair-accessible bus available for scheduled social and recreational events in the greater community.
- Data ports in every apartment for computer access. Monthly fee is the resident's responsibility.
- Telephone access available. The resident is responsible for acquiring and paying for services in apartment.
- Cable television access (no fee for one television).
- Therapy services offering physical, occupational, speech, aquatics, and fitness programs.
- Therapy equipment designed especially for older adults.
- Out of area medical transportation, if pre-arranged. A fee will be assessed.

3. Benjamin Borden Health Center Services and Amenities.

The Benjamin Borden Health Center is a 60-bed licensed nursing center providing both skilled and intermediate nursing care. The Borden Center is staffed with licensed and/or registered nurses 24-hours a day and is available to all residents.

Services and amenities available to Borden Center residents include:

- Comfortable rooms where each resident enjoys privacy, a window and personal control of heat and air conditioning.
- Housekeeping services daily.
- Meals prepared under the direction of a registered dietitian and served restaurant style in an attractive dining room.
- Laundry service available for a small fee.
- Programs and life-enriching activities based on individual preference.
- Wheelchair-accessible bus available for scheduled social and recreational events in the greater community.
- Access to the Tutwiler Library.
- Therapy services offering physical, occupational, speech, aquatics and fitness programs.
- Therapy equipment designed especially for older adults.
- Warm water therapy pool.
- High nurse-to-resident ratio.
- Clinic on-site for podiatry, counseling, laboratory, and physician visits.

K. Transportation

An important aspect of life at Kendal is the ability to leave the campus for medical and business appointments, for shopping and sightseeing, and for other events and activities.

1. Transportation – Medical Emergencies

Call 911 for medical emergencies. Ambulance service to the *local* hospital will be provided as needed.

2. Transportation – Medical Appointments

a. Local Appointments

Information on how to schedule transportation through Kendal to local medical appointments is found on the **alcove bulletin board under the heading, Transportation Information**. To schedule transportation to medical appointments, call the receptionist at **463-1910**. It is possible to email as well to: transportation@kalex.kendal.org. If transportation is needed after office hours (evenings, nights, weekends and holidays) or on short notice, call the Borden Center at 464-2632.

b. Out-of-Town Appointments

Note that some clinics require drivers to remain at the facility for the duration of any procedure.

- **Volunteers**
On the alcove bulletin board there is also a list of residents willing to drive to health-related appointments – volunteering to drive at various times, day and night; in-town and to specific locations out-of-town
- **RATS (Rockbridge Area Transportation System)**
Transportation to medical appointments in Charlottesville, Roanoke, Augusta, etc. can be obtained from RATS, a local non-profit organization. The cost (for two people total) is usually about \$250 for transportation and wait time; it is suggested that the patient be accompanied by a friend. Additional information is available in the alcove. RATS fees may be adjusted according to financial need.
- **Commercial Services (see below)**
- Kendal will provide non-emergent transportation for medical appointments out of the area. Transportation must be scheduled at least 5 business days in advance of the appointment with the Anderson Receptionist during regular business hours (8:00 a.m. -4:30 p.m. Monday through Friday). There is a fee for this service and the fee varies based upon the distance/location and duration of the trip. An additional fee may apply if the trip is over a meal time or if a companion is required. Contact the Anderson Receptionist at 540-464-2602 or 540-464-2604 if you have questions or to schedule an appointment

3. Scheduled Local Transportation

- a. **Shopping Bus.** The Kendal shopping bus runs Monday through Friday from 10:00 a.m. to 11:00 a.m. with the exception of Wednesday when it runs from 2:00 p.m. to 3:00 p.m. The trips are scheduled only if residents have signed up to ride by 3:00 p.m. the day before. Sign-up sheet is in the **alcove bulletin board** under the heading **Transportation Information**. Residents may also submit sign-up requests to the Receptionist (463-1910). The bus normally departs from the main Anderson entrance or Webster entrance (check the Alcove for details). Residents must specify if they wish to be picked up at an alternate location (South entrance or a cottage). The bus stops at places such as the library, local stores, banks, etc. It has seats for 10 plus space for 2 wheelchairs.
- b. **Activities Bus.** When there is enough interest and a Kendal bus is available, off-campus trips sponsored by the Culture and Entertainment Committee are scheduled. The sign-up sheet is on the **Bus Trips bulletin board**. There may be a small cost involved.

4. Commercial Travel Options

The **alcove bulletin board (Transportation Information)** provides a list of local private limousines, transport services, and taxis that are available for local and out-of-town travel. Information on the Rockbridge Area Transportation System (RATS) is also posted on that bulletin board.

L. Electronic Services

1. Television

Basic cable services with HDTV (high definition technology) is provided to Kendal residents for one television at no additional charge via the Comcast network. Comcast regards Kendal as a “bulk” customer. It is sometimes helpful to use this term when contacting Comcast about service problems.

Premium channels, additional devices or services must be arranged directly with Comcast. A fee will be assessed.

2. Internet and Telephone Services

Comcast, CenturyLink, Verizon and Virginia Technology Services offer a variety of services (hard-wired and wireless) for household electronics. Generally, internet service may be bundled with telephone service.

3. Assistance with Electronic Devices

The Information Technology department offers residents assistance with their computers and other electronic devices. The services offered and the fee structure is described below:

1. Residents may request Kendal at Lexington’s IT Staff for Technology services related to computer, home network, wireless network, and peripheral installation, and setup (printers, iPads, Kindles, etc.). Appointments may be made by calling the receptionist at 463-1910.
2. Fee Structure
 - a. Initial Investigation – No Charge. Charges begin after 15 minutes.
 - b. Troubleshooting -- \$30.00 per hour, prorated, \$30.00 minimum fee.
 - c. General Service -- \$30.00 per hour, prorated, \$30.00 minimum fee.
3. Available Services
 - a. Computer Setup (Connections, Verify Start Up).
 - b. Printer Setup and Installation.
 - c. Wireless Network Setup and Installation.
 - d. General Troubleshooting.
 - e. Ask at Front Desk for list of residents available to help.
 - f. Ask at Front Desk for list of outside technicians.
4. Services Not Provided
 - a. Computer/Peripheral Repair.
 - b. Virus Removal/Computer Clean Up.
 - c. Software Installation and Instruction.
 - d. General Use Instruction.
5. Payment
 - a. Residents will receive a bill at the completion of the service call.
 - b. Billing for Technology Services will be added to resident monthly bills.

M. Pets

Many Kendal residents continue to be responsible pet owners once moving to Kendal. Kendal welcomes and embraces pets as a part of the community if the owner can provide responsible pet care.

As pet owners at Kendal, it is the responsibility of each owner to pay a non-refundable pet deposit of \$200 per pet (with pets on campus prior to July 1, 2019 grandfathered with no fee required). You must also ensure that you have signed the Kendal Pet Agreement Form and that your pet(s) have been registered and the appropriate shot records have been provided. Kendal expects all pet records to be updated annually including updated shot records. To register your pet or to update your pet(s) records please contact Resident Services.

It is the responsibility of each pet owner to keep pets on a leash under direct control of the owner when pets are outside or in the Kendal open areas or public areas of Anderson, Webster or Borden buildings; to use a pooper scooper or otherwise pick up when the pet relieves themselves and dispose of waste in proper outdoor containers; and to ensure that there is a plan in place for the pet should there be an emergency or should the owner be unable to care for the pet. The emergency plans for the pet should be updated with Resident Services when changes occur and/or annually.

Pets are not allowed in the Dining Room, Fitness Center, Pool area or Sunnyside (see Sunnyside guidelines for exceptions).

Please also ensure that should your pet expire, or you add a new pet to your family that you ensure the records held in Resident Services reflect those changes.

Any owner who does not abide by Kendal's established pet protocols could be determined in breach of their contract. Additionally, Kendal has a policy to address problems with responsible pet care or instances when an individual is unable to continue to manage their pet(s) care. All pet owners are given a copy of this policy at admission and as indicated based upon staff interventions.

Section V. Publications and Forms - Contents

A. Kendal Publications

B. List of Forms

C. Sample Forms

VI. Publications and Forms

A. Kendal Publications

1. Values and Practices – The Kendal Corporation

This is a statement that reflects experience gained over many years. It also reflects the vision and dedication of many Kendal people including board members, staff members, and residents. Revised March 2010. This booklet is given to all residents at the time of occupancy. Additional copies are available at Reception.

2. Kendal at Lexington – Resident Newsletter

A resident newsletter committee publishes this newsletter monthly. You will find it in your open mail box the first of each month. The monthly calendar included with the newsletter will help you keep track of activities.

3. Kendal at Lexington – Marketing Newsletter

This is a biannual publication prepared for distribution to residents, persons on the futures list, and others who are related to or interested in Kendal.

4. Kendal at Lexington – Webster and Borden Center Calendars

These are monthly publications that focus on activities in the Webster Center and the Borden Center as well as a calendar of events for residential living.

5. Health Center Brochure

This booklet describes the facilities and services available in the Health Center. It is available from Marketing.

6. Weekly Menus

Copies of the weekly menus are available for all residents on the ledge below the open mail boxes.

7. Residence and Care Agreement

This agreement outlines independent residents' rights and responsibilities. It is a legal document that residents signed before moving into Kendal, and includes detailed information about life at Kendal. If you have questions about conditions of occupancy or Kendal services, your answer may be found in this publication.

8. The Kalex

A Kendal at Lexington Resident Literary Magazine. An interest group publishes the Kalex yearly. It contains articles and art work by residents.

B. List of Forms

The following forms are to be used by residents. Copies are available at the reception desk or as noted below.

1. Pet Registration

This form needs to be completed by all residents who own pets. Return the form to Resident Services.

2. Waiver for Bi-Weekly Cleaning

If you would like to have cleaning service when you are not at home you will need to complete this waiver. See housekeeping procedures. Return completed form to Housekeeping Supervisor.

3. Comment Card for Dining Services

Comment cards are available in the main dining room for residents to comment on their meal service and quality. Cards may be placed in the comment card box located in the main dining room.

4. Work Orders

Use WorxHub to submit Maintenance Work Orders online. If you do not have access to WorxHub, please contact the Director of Operations who can assist you in gaining access. You can also request maintenance by notifying the Receptionist in Anderson who will initiate a WorxHub work order on your behalf.

5. Request for Covered Parking

a. Rental Request Form

Use this form to request or relinquish an assigned covered parking space or to request to be wait-listed for covered parking. Return your completed form to Marketing.

b. Covered Parking Assignment Agreement

This form is to be completed when a covered parking location is assigned. Return your completed form to Marketing.

6. Shopping Bus Sign-Up Sheet

This bus runs Monday through Friday 10:00 – 11:00 a.m. with the exception of Wednesday when it runs from 2:00 – 3:00. The form is posted on the transportation section of the alcove bulletin board, Anderson Hall.

7. Absences from Kendal Overnight

Complete this form, available at the reception desk in Anderson Hall, when planning to spend the night away from Kendal. If there is no one at the front desk and you leave on short notice, go to the Webster Center and complete the form there. You may also email to awaylist@kalex.kendal.org

8. Planned Hospital Stay

Complete this form if you are scheduled for a planned hospital stay. Return the completed form to Clinic Manager or Director of Resident Services.

9. Resident Vehicle Registration Form

If you have an automobile at Kendal, this form must be on file in the Facilities Services office. If you sell your car or purchase a new one, you will need to report these changes. Please notify Anderson Receptionist of all vehicles and/or changes.

B. Sample Forms

Samples of the forms listed above are included for your information. They follow this section.

1.**Kendal at Lexington****PET CARE AGREEMENT**

I agree to the conditions set forth in the Kendal Responsible Pet Care Policy. I agreed to care for my pet(s) daily as specified in the policy, make sure my pet(s) have an annual physical and will keep my pet(s) recommended vaccinations current.

I agree to be held accountable for any damages that my pet(s) might cause to Kendal at Lexington property. I agree to pay **\$200** non-refundable fee secured when signing this agreement and I will pay any additional fees to repair Kendal property should damages occur.

No pet(s) are allowed on premises until all forms are submitted and deposit is paid.

If I am unable to take care of my pet, I have designated a Person Responsible to Care for my Pet and a Person Responsible to take ownership of my Pet should I be unable to provide my pets care for a prolonged time.

Signature of Resident: _____ Date: _____

Signature of Person Responsible to care for my pet:

_____ Date: _____

Signature of Person responsible to take ownership:

_____ Date: _____

Form Revised: 01/04/2018;4/29/2019

2.Kendal at Lexington
Pet Registration Form☐ I Do Not Have a Pet

Resident's Name: _____ Date: _____

☐ Yes, I Do Have a Pet(s)

Resident's Name (Owner): _____

Address: _____

Phone: _____ Email: _____

Name of Pet	Species of Pet	Date of last Physical	Rabies Inoculation	Other Vaccinations	Things to know about pet
<i>Example: Chuck</i>	<i>Terrier -dog</i>	<i>01/03/17</i>	<i>01/03/17</i>	<i>2/16/17</i>	<i>Bites at strangers</i>

***Copies of my pet(s) records are attached to this registration form including verification of physical and species appropriate vaccinations.**

(Continued on back of Form)

Preferred Veterinarian: _____

Address: _____ Phone: _____

This person will temporarily care for my pet if I am unable to do so.

Name: _____ Phone: _____

Revised: March 2013, June 2019

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Alternate: _____ Phone: _____

(If you name your spouse, please also name an alternate person.)

This person will assume ownership of my pet in the event of my prolonged inability.

Name: _____ Phone: _____

Address: _____

(If you name a veterinarian, you must contact the vet, decide, and provide us with a letter from the vet stating his/her willingness to take on this obligation.)

Signature of Resident (Owner): _____ **Date:**

In Office Use Only:

_____ Registration Form

_____ Added to Binder

_____ Added to RCC List

_____ Copy of Physical

_____ Copy of Vaccinations

_____ Added to AOD

_____ Added to Emergency Roster _____ Deposit Paid

_____ Deposit Waived

3. Waiver for Bi- Weekly Cleaning
KENDAL AT LEXINGTON
FACILITIES SERVICES

RELEASE AND WAIVER OF LIABILITY AGREEMENT

For and in consideration of Kendal at Lexington making available its agents and/or employees for the purpose of entering and cleaning my cottage/apartment in my absence, I for me and my personal representatives, heirs and next of kin do hereby:

Release, waive, discharge and covenant not to sue Kendal at Lexington, its agents and/or employees and its or their successors or assigns, and release them from all liability to me, my personal representatives, heirs and next of kin for any and all loss or damage, and any claims or demands therefore, on account of any loss or damage to my personal property, whether caused by the negligence of Kendal at Lexington or any of its agents and or employees, while said agents and/or employees are cleaning my unit while I am residing at Kendal at Lexington.

I have read and voluntarily sign this Release and Waiver of Liability Agreement and further agree that no oral representations or inducements apart from the foregoing written agreement have been made.

Please check the appropriate line and fill in the information required below.

This waiver is valid:

_____ For the week(s) of: _____

_____ During my temporary stay in the Webster Center, beginning on: _____

_____ For my regularly scheduled Housekeeping Services person beginning on the following date _____ and until further notice.

Access to my cottage/apartment may be obtained by:

_____ Contacting my neighbor, _____, with whom I will be leaving a key.

_____ The Housekeeping Services person using a key made available by Facility Services to open my door. (Note: Residents should not leave their units unlocked while away from home.)

Resident Name: _____ Signature: _____ Date: _____

Witness Name: _____ Signature: _____ Date: _____

IF YOU DO NOT WANT TO GIVE PERMISSION TO CLEAN YOUR APARTMENT OR COTTAGE WHEN YOU ARE NOT AT HOME PLEASE CHECK _____ NO HERE, AND SIGN ABOVE.

4.

Dining Services Comment Card

The Dining Services Staff and the related resident committee welcome your comments about dining services here at Kendal. Your observations and suggestions will assist us in our continuing efforts to improve the Kendal dining experience.

Comments about your SERVICE on _____ (Date)

Comments about your MEAL on _____ (Date)

Check Meal Commented On: Lunch

☐

Dinner

☐

Name (Optional) _____

Please put this Comment Card in the box near the stairs or give it to a Dining Services staff member on your way out of the dining room.

5 A.***Covered Parking******Rental Request Form***

I/We request to rent a covered parking spot from Kendal and understand I/we will need to sign the Rental Agreement.

Resident 1: _____ [Name]

Resident 2: _____ [Name]

Apt/Cottage #: _____ Telephone: _____

Make/Model of Car: _____

License Plate: _____

Rental Charges begins on: _____ [Date billing begins]

Rental Charge: \$ _____ [Monthly Charge]

Covered Parking Spot Assigned # is: _____ Location is: _____

Resident Signature(s): _____

Acknowledged by: _____ [Marketing Director]

Acknowledged on: _____ [Date]

I/We request to *move-out* of the above covered parking spot on _____.

Resident Signature(s): _____

☐ I/We request to be on a *wait list* to rent a covered parking spot. Date: _____

Preferred Location is: _____ or any spot: _____

Distribution

1. Copy this form to the Accounting Department – only when renting/move-in or move-out.
2. Keep Original in the Covered Parking Rental List Master File in the Marketing Department.

5 B.*Kendal at Lexington**Covered Parking Assignment Agreement*

I, _____, agree to pay \$50.00 per month to Kendal at Lexington for the use of _____ covered parking area. The cost is subject to change with 30 days advance written notice. The covered parking area is for storage of vehicles only, other than items that can fit into the cabinet provided.

Kendal is not responsible for the loss of any property belonging to you due to theft, fire or any other cause. You have the responsibility, at your own expense, of providing any insurance you desire to protect against any such loss.

You may surrender the garage at any time with written notice to Kendal. You must remove all personal belongings by the date of surrender.

Resident Signature

Date

Resident Signature

Date

Kendal Staff Representative

Date

6.



KENDAL[®] at Lexington
Together, transforming the experience of aging.SM

SHOPPING BUS SIGN-UP SHEET

The Kendal shopping bus will run Monday thru Friday 10:00 to 11:00 a.m.
 with the exception of Wednesday when it will run from 2:00 to 3:00 p.m.

**DO NOT USE THIS SHEET TO SIGN-UP FOR DOCTOR
 APPOINTMENTS!!!**

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY

7.

Absence from Kendal

Today's Date: _____

Resident(s): _____

Apartment/Cottage Number: _____

Date of Departure: _____

Date of Return to Kendal: _____

Phone Number I/We Can Be Reached: _____

*Please submit to front desk Monday through Friday 8:30 a.m. - 4:30 p.m.
Week days after 4:30 p.m. and on weekends please
leave with a Webster staff member*

Marketing may show your cottage or apartment while you are away.

Check: Yes ☐ No ☐

8.*Hospitalization Notification*

Today's Date_____

Resident's Name_____

Phone Number_____ Apt/Cottage #_____

Hospital Name_____

Date(s) of Admission_____

If surgery is planned, please describe here (or contact the Clinic Nurse as soon as possible at 464-2609 or the Director of Resident Services at 458-3785):

PLEASE GIVE THIS TOP HALF TO THE CLINIC NURSE OR DIRECTOR OF RESIDENT SERVICES

.....
FOLD AND TEAR HERE

FOLD AND TEAR HERE

Dear Resident,

PLEASE TAKE THIS HALF for easy reference in the event of any hospitalization.

Important Contacts at Kendal

540-464-2630.....Admissions Coordinator for arranging your post-hospital discharge move back to Kendal

540-458-3785.....Director of Resident Services for information regarding getting assistance with arranging for in-home care and companions

540-464-2609..... Clinic Manager for medical concerns or if you are unable to reach the Admissions Coordinator and Director of Resident Services.

Please submit to front desk Monday-Friday 8:30 – 5:00 p.m.

Week days after 5 p.m. and on Weekends please leave with a Webster Staff Member.

9.**RESIDENT****VEHICLE****REGISTRATION FORM**

Please complete this form and return it to the receptionist, who will issue you a sticker for your vehicle(s).

DATE: _____

NAME(S): _____

Apt/Cottage #: _____

MAKE OF VEHICLE #1: _____ MODEL: _____

YEAR: _____ STATE: _____ COLOR: _____

COLOR: _____ PARKING DECAL? _____

MAKE OF VEHICLE #2: _____ MODEL: _____

YEAR: _____ STATE: _____ COLOR: _____

COLOR: _____ PARKING DECAL? _____

If you sell your vehicle or purchase a new one, please let us know so we can update our records as soon as possible and give you a new sticker.

Thank you!

Section VI. Community Resources - Contents

- A. Washington & Lee (W&L)**
- B. Virginia Military Institute (VMI)**
- C. Lifelong Learning Opportunities**
- D. Information – Lexington/Rockbridge County**
- E. Fine Arts in Rockbridge (FAIR)**
- F. Rockbridge Choral Society**
- G. Libraries**
- H. Lexington Museums**
- I. Local Newspapers**
- J. Religious Services**
- K. Service Clubs and Other Organizations in the Area**
- L. Parks and Trails**
- M. Maury River Senior Center**
- N. Recreational Sports**

VI. Community Resources

The charming college town of Lexington, nestled in the Shenandoah Valley of Virginia, is located an hour from Roanoke, 75 minutes from Charlottesville, and about three and a half hours from Washington, D.C. Lexington has a vital downtown area that has kept the historic charm of the 19th century, when Robert E. Lee and Stonewall Jackson walked the streets.

Residents at Kendal include people who have lived in the area for many years, people who have “come back” to Lexington, and people who have never lived in the area. As a special help to those of you who are just beginning to get acquainted with Lexington and Rockbridge County the following information is provided. Questioning other residents, watching the bulletin board, and reading the Kendal newsletter and the local newspaper will also help you know where to go and what to do. The Kendal bus is often available to take residents to many events. Sign-up sheets can be found on the bus trips bulletin board in Anderson.

A. Washington & Lee (W&L)

- A campus map is available from the W&L admissions office.
- Phone number - 458-8710
- Check www.wlu.edu for listing of W&L events.
- Lectures covering many subjects are scheduled throughout the academic year. Most of these are free and open to the public.
- Lenfest Center for the Performing Arts at W&L offers many cultural events during the year performed by students and professionals. Subscriptions are available at the beginning of the season for music, theater, and dance presentations. For a schedule and further information call the Box Office at 458-8000. (Open 9:00 – 11:00 a.m. and 1:00 -3:00 p.m. Monday through Friday) There are special rates for seniors and many programs are free.

B. Virginia Military Institute (VMI)

- To receive the monthly newsletter, call the Office of Communication and Marketing at 464-7207 or [www.vmi.edu/news/institute report](http://www.vmi.edu/news/institute%20report)
- VMI Dress Parades by the Corps are held most Friday afternoons during the academic year, normally at 4:30 PM.
- Many lectures and conferences are held at VMI. The George C. Marshall Foundation and the Society of Cincinnati Lectures, Civil War Roundtables, the U.S. Mid-East Policymakers Conference and the B. K. Johnson lectures bring nationally and internationally known leaders from around this country and the world.
- VMI has several plays a year including some dinner theater performances.
- You may request a Visitor’s Guide that includes a map of the Post from the VMI Visitors Center at 464-7306.

C. Lifelong Learning Opportunities

- Residents may audit classes at Washington and Lee with permission of the instructor. There is no cost. Copies of the current catalog and course schedule are available online at <http://registrar.wlu.edu>.

- Alumni College at W&L: Five sessions on a wide variety of topics are presented in July, as well as travel tours abroad during the year. More information is available at <http://alumnicollege.wlu.edu>.
- VMI: Summer sessions, two 6-week sessions, are open to residents (Call 464-7213).
- Speakers, concerts, lectures and plays at VMI & W&L are open to the public. Some are free; many have a modest charge.

D. Information – Lexington/Rockbridge County

The Lexington Visitors Center at 106 E. Washington Street, 463-3777, has a large supply of pamphlets and maps of the area. Check the website www.lexingtonvirginia.com for further information on local lodgings, dining, attractions and events.

E. Fine Arts in Rockbridge (FAIR)

This is a year-round education effort in the visual, literary, and performing arts. Activities include Summer FAIR, Rockbridge Symphony, Rockbridge Youth Strings, Rockbridge Ballet, Halestone Dance Studio, Discovery Height's Children's Museum and FAIR in the Schools. Call 464-3247 for brochures and information and check the website, www.fairva.org.

F. Rockbridge Choral Society

For more than 25 years the Choral Society has brought together local and guest musicians to present many performances of the finest works in choral literature. New singers are welcome to join other Kendal resident members. For information call Kendal resident, Ted Burrowes at 461-2345 or society member Elizabeth Oliver at 458-8637. William McCorkle is the director.

G. Libraries

- Rockbridge Regional Library www.rrlib.net
The main branch of this library is located at 138 S. Main Street in Lexington. Telephone is 463-4324. The library serves Bath County, Buena Vista, Glasgow, Lexington, and Rockbridge County extremely well. Each year, the Friends of the Rockbridge Regional Library sponsor A major book sale the first Thursday, Friday and Saturday of each month.
- Virginia Military Institute Library
The VMI Preston Library contains approximately 250,000 volumes.
- Washington & Lee Library
The Leyburn Library of Washington and Lee University contains over 700,000 volumes. Residents are welcome to borrow materials.

H. Lexington Museums

- VMI Museum, Jackson Memorial Hall and the George C. Marshall Museum at VMI
- Lee Chapel Museum, the Reeves Center and Watson Pavilion at W&L
- Stonewall Jackson House
- Rockbridge Historical Society Museum
- Miller's House Museum

I. Local Newspapers

- *The News-Gazette*- This paper is published every Wednesday in Lexington. Subscriptions may be obtained by calling 463-3113. The website is www.thenews-gazette.com.
- *The Rockbridge Advocate*- The Advocate is an independent monthly news magazine: "Independent as a Hog on Ice". Subscriptions available by calling 463-2062. The website is www.rockbridgeadvocate.com.

J. Religious Services

Each week *The News Gazette* includes a directory of religious services and activities on the RELIGION page. This is a comprehensive list that includes all denominations. The Maury River Friends Meeting is included. For residents unable to attend church services in town an ecumenical vesper service led by local clergy is held every Sunday afternoon, usually in the Borden Center Sunroom at Kendal.

K. Service Clubs and Other Organizations in the Area

A number of Kendal residents and staff belong to local service clubs and attend on a regular basis. A wide variety of other organizations offer opportunities for membership or other participation. Some of these are: YMCA of Virginia's Blue Ridge, Women's Club, Master Gardeners, Newcomers Club, Rotary Club, Lions Club, Rockbridge Area Genealogical society, Historic Lexington Foundation, DAR, Rockbridge Historical Society, English Speaking Union, and Habitat for Humanity. Ask other residents or senior staff members if you have questions about how to contact or become involved with one of these groups.

L. Parks and Trails

- Natural Bridge State Park
- Jordan's Point Park
- Glen Maury Park in Buena Vista (pool, picnicking)
- Woods Creek Trail
- Kids Playce
- Chessie Nature Trail
- Brushy Hill
- Boxerwood
- Lexington City Pool (operated by the YMCA)
- Rockbridge Aquatics Center
- Lake Robertson (pool, lake, picnicking)
- Blue Ridge Recreation Pool (Fairfield)
- Brewbaker Field Sports Complex

M. Maury River Senior Center

Located at 2137 Magnolia Avenue in Buena Vista, the Center is open Monday through Friday from 8:00 a.m. – 4:00 p.m. With state and local funding, the center offers programs to Rockbridge County seniors

ranging from exercise programs and bridge games to helping seniors prepare their tax returns. For further information call 261- 7474.

N. Recreational Sports

Golf is available at the Vista Links Golf Course in Buena Vista (261-4653), and the Lexington Golf and Country Club (463-3542).

Tennis players have access to Washington & Lee and VMI outdoor courts.