

## Dear Friends,

How do you define success? Patti Thor, speaker, author and entrepreneur has said, “It’s not that successful people are givers; it is that givers are successful people.” Our Board of Directors, senior leadership, staff, residents and volunteers are living out this idea every day through their efforts in our communities.

For ERH, thanks to this incredible team, 2014 was a success by every measure. We can report a solid year of great results: growth, service enhancements, financial strength, innovation and positioning our organization for the future. As it has been in the past, our mission and core values will be the driving forces in our daily work as we help those we serve *live well into the future*.

As the overall economy grew in 2014, we experienced even stronger demand for our services, which was reflected in our strong financial performance.

Other notable accomplishments for 2014 include:

- Earned Top Workplace award fifth year in a row
- Created a new website to provide a better user experience
- Selected for participation in the Medicare bundled payment pilot study
- Recognized by The Christ Hospital as an accredited member of its Heart Failure Network
- Expanded Affordable Living Communities with seven projects in development
- Completed a successful pilot study for Saïdo, our innovative memory-support therapy program

We are committed to enriching the lives of the elders we serve and to supporting their families. There is no doubt that health care in this country is undergoing a historical transformation that will impact us all. ERH is already on the forefront of this change, and it is our goal to continue to lead the market with innovative, cost-effective services that provide better outcomes for the population we serve. As always, this is possible only because of the dedication, compassion and hard work from all the talented people associated with the ERH family. Thank you again for all that you do.

Sincerely,



Robin O. Smith  
Chair, ERH Board of Directors



R. Douglas Spitler  
President and CEO

# 2014 Overview and Financial Report

## Balance Sheet

For the years ending December 31, 2014 and 2013

Assets	2014	2013
Current Assets	\$17,923,039	\$15,433,292
Marketable Investments	\$31,830,850	\$28,869,848
Fixed Assets	\$92,124,646	\$100,967,848
MPL Endowment	\$21,420,580	\$21,582,150
Intangible Assets	-	\$10,800,000
Other Assets	\$16,854,230	\$7,231,694
<b>Total Assets</b>	<b>\$180,153,345</b>	<b>\$184,884,832</b>

Liabilities	2014	2013
Current Liabilities	\$8,495,306	\$13,840,631
Unamortized Entrance Fees	\$18,052,600	\$15,259,991
Long-Term Debt	\$43,038,328	\$45,038,953
Other Liabilities	\$7,421,436	\$3,584,117
<b>Total Liabilities</b>	<b>\$77,007,670</b>	<b>\$77,723,692</b>

Net Assets	2014	2013
Permanently Restricted	\$23,881,481	\$21,661,433
Temporarily Restricted	\$601,473	\$355,881
Unrestricted	\$78,662,721	\$67,510,084
<b>Total Net Assets</b>	<b>\$103,145,675</b>	<b>\$89,527,398</b>

<b>Total Liabilities &amp; Net Assets</b>	<b>\$180,153,345</b>	<b>\$167,251,090</b>
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## Total Individuals Served / Contacts Made

11,857

Parish Health Ministry\*

677

Affordable Living

51

Assisted Living

293

Independent Living

45

Living Well Senior Solutions

294

Deupree Meals On Wheels

287

Nursing Care

13,504

Total Individuals Served

\*Contacts made through health screenings, referrals and other activities

**Condensed Statement of Revenue and Expenses**  
*For years ending December 31, 2013 and 2014*

	2014	2013
Operating Revenue	\$35,403,391	\$33,743,006
Operating Expense	(\$40,077,212)	(\$34,980,495)
Net from Operations	(\$4,673,821)	(\$1,237,488)

	2014	2013
Non-Operating Revenue	\$8,233,062	\$8,335,499
Limited Partner Equity	\$2,919,575	(\$8,335,499)
Total Change in Net Assets	\$11,152,637	-

**2014 Contributions and Commitments**

**\$575,000**

*Good Samaritan Mission  
Annual gifts*

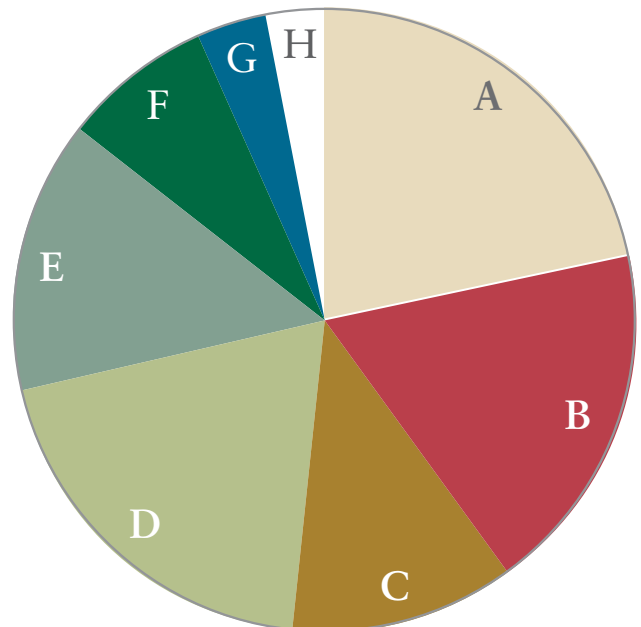
**\$1,643,235**

*Realized and Newly Committed  
Planned Gifts*

**2014 Ministry Costs**  
*For the year ending December 31, 2014*

Ministry Item	2014
<b>A</b> - Parish Health Ministry	\$146,000
<b>B</b> - Affordable Living	\$122,000
<b>C</b> - Spiritual Care	\$77,000
<b>D</b> - Volunteer Coordinators (including Affordable Living)	\$133,000
<b>E</b> - Staff Assistance, Partners In Care fund, LWSS	\$94,000
<b>F</b> - Meals On Wheels	\$51,000
<b>G</b> - SAIDO Tuition Assistance	\$24,000
<b>H</b> - Community Outreach	\$20,000
<b>Total Ministry Costs</b>	<b>\$667,000</b>

**2014 Ministry Costs**



*This condensed financial information was extracted from the 2015 Episcopal Retirement Homes, Inc. financial statement, a copy of which is available in the president's office.*

# 2014 Ministry Report

As a mission-centered, nonprofit organization, we go above and beyond to give and to serve. It is our privilege and responsibility to benefit communities that we serve. This report is an annual account of both statistical and anecdotal evidence that demonstrates how our mission has been carried out.



*Left, Estelle Topmoeller, Marjorie P. Lee resident with Sierra Sherman, Administrative Manager*



*Left, Pierce Matthews, Deupree House Resident with John Parker, Residential Service Director*

## FINANCIAL ASSISTANCE

The mission and ministry of ERH actively supports elders in our care and staff members who serve them. Direct financial support is offered to meet a wide range of financial needs through the Partners In Care fund and other funds; some examples are listed below.

Aid is offered to residents without means to pay for SAIDO Learning, a memory-support therapy. SAIDO, offered at Marjorie P. Lee, is a non-pharmaceutical intervention that is proven to improve or slow memory loss among adults with cognitive impairment. One resident’s family expressed that the therapy helped their mother “blossom into all that God wanted her to be.” Staff members in need are aided through tuition reimbursement or through the Staff Emergency Fund. The ERH Partners In Care fund is used to help residents receive daily living items and services not covered by

government programs or insurance such as hearing aids, eyeglasses and dentures. When a resident at St. Paul Village needed to travel to Atlanta for follow-up appointments after surgery, the ERH Partners In Care fund stepped in to assist with travel expenses. The coordinator worked with the lodging company to have the resident’s stay billed to the Partners In Care credit card. With this assistance, the resident was able to travel to Atlanta and keep his medical appointments.

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<i>Resident Financial Aid</i> .....	<b>\$986,000</b>
<i>Staff Tuition Assistance</i> .....	<b>\$77,404</b>
<i>Partners In Care fund (41 residents)</i> .....	<b>\$11,852</b>
<i>Staff Emergency Fund (14 staff)</i> .....	<b>\$1,692</b>
<i>Living Well Senior Solutions Assistance</i> <i>(21 residents )</i> .....	<b>\$3,225</b>
<i>SAIDO Learning Assistance (7 residents)</i> ..	<b>\$24,000</b>

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**AFFORDABLE LIVING**

ERH is proud to offer subsidized affordable senior living communities that provide a variety of options and services not often found in communities for limited-income seniors. We believe older adults deserve to live with dignity and enjoy life in a safe and supportive community regardless of their financial situation. All of our communities offer activities, transportation, care coordination, spiritual services and wellness programs. Morning coffee gatherings, spiritual services, bus trips, exercise programs and more offer something for everyone to enjoy.

At Shawnee Place in Springfield, residents and volunteers organized a craft show during the Holiday in the City event and raised \$500 for their resident council. Volunteers from six area high schools came to St. Paul Village in Madisonville seeking service hours and stayed after graduation to serve residents.

At Canterbury Court, the Dayton Public Library offered a six-week iPad Education class to seven residents. Canterbury offers other classes that inform on health and wellness for mind, body and spirit.

Health services at most of our communities aid the residents and uncover a variety of concerns. Clinical services such as podiatry, dentistry and vision care are offered at many of the communities by local doctors.

Residents can stay active and involved by helping in the community with gardening, joining an Alzheimer’s Walk or “Crocheting for a Cause.”




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<i>Residents</i> .....	<b>677</b>
<i>Communities</i> .....	<b>9</b>
<i>Communities in Development</i> .....	<b>9</b>
<i>Cost of Services For Residents</i> <i>(Not Funded by HUD)</i> .....	<b>\$122,000</b>

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**COMMUNITY OUTREACH**

In 2014, ERH made donations to other nonprofits including the Alzheimer’s Association, Episcopal Community Services Foundation, Caring Place Toy Drive, Working in Neighborhoods, LeadingAge Ohio, Hyde Park Center for Older Adults and others.

The Council for Life Long Engagement is an action learning program aiming to create positive interaction between grade school students and elders with a long-term mission of eradicating ageism. Eight retirement communities around the country have implemented the program, and it will soon be international. CLLE partners locally with Nativity School, St. Mary’s, Mt. Notre Dame High School, Kilgour and St. Cecilia.

Deupree House Outreach Committee, in partnership with a Mount Notre Dame senior, donated more than 5,000 pill bottles to Matthew 25: Ministries to distribute medicine in developing countries. The group also helps Friends of the Groom, a local theatre company, by stuffing envelopes with promotional material.

The Marjorie P. Lee residents donated more than 475 knitted hats to Crayons to Computers. St. Paul’s Episcopal Church in Martins Ferry, Ohio, hosted a Christmas party for the community. The donated gifts brought joy to many, and each child received Christmas gifts. This year, \$650 in monetary donations and hundreds of gifts were delivered to Martins Ferry, an area of the Episcopal diocese that needs an expression of the true meaning of Christmas.

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<i>Total donations to other Community</i>	
<i>Nonprofits</i> .....	<b>\$20,000</b>
<i>CLLE Encounters</i> .....	<b>40</b>
<i>Students Involved in CLLE</i> .....	<b>459</b>
<i>CLLE Volunteer Hours</i> .....	<b>112</b>

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*Residents of St. Paul Village stay active in the fully equipped fitness center.*





*Betsy Babb, right, provides a blood pressure check to a parishioner at Episcopal Church of the Redeemer.*

**PARISH HEALTH MINISTRY (PHM)**

PHM extends our mission and ministry outside the walls of the retirement communities. Working with 72 churches in the region, PHM coordinators encourage congregations to renew their role in health care through advocacy, education and wellness programs.

St. James of the Valley Catholic Church in Wyoming was one of the first partners with PHM when the program began in 1998. They have continued to be an active ministry over the years and in 2014 made 1,139 contacts through visits, prayer shawls and other ministries.

The bereavement team at St. James, in partnership with health ministry, began using the Journeying Through Grief program provided by ERH Parish Health Ministry and reported very positive feedback from their parishioners.

**LIVING WELL SENIOR SOLUTIONS (LWSS)**

LWSS serves seniors and family members with the goal of enabling quality living to prevail over life’s challenges. Through a process of addressing personalized solutions, LWSS minimizes the chance of a crisis situation. Our vision isn’t limited to a client’s medical needs, also it works with clients to ensure that the individual’s goals for aging well are being met. For two clients, these goals involved world travel.

Bill traveled in Europe extensively in his career and early retirement years. In 2013 his travel plans included a transatlantic cruise on the Queen Elizabeth II. In 2014 he spent three weeks touring through Switzerland with a stop in Venice, Italy.

Betty enjoyed a wonderful weeklong trip to visit family in California. She enjoyed shopping, eating at her favorite restaurants and visiting museums with her grandchildren.

Life doesn’t stop because a client has collected a few problems. Having a LWSS Care Manager to assist with planning makes traveling not only possible, but a joy!

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Total Contacts.....	35,572
Volunteers.....	521
Hours of Service.....	14,779
Referrals.....	759
Blood Pressure Screenings.....	5,022
Cost of Program.....	\$192,905
Funded through Grants and Contributions.....	24%

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Contacts.....	45
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**DEUPREE MEALS ON WHEELS**

With Deupree Meals On Wheels, ERH provides older adults throughout Cincinnati with warm, nutritious meals delivered to their homes. More than 380 meals are delivered per day by compassionate and caring staff and dedicated volunteers. Our volunteers provide the crucial social contact to supplement an elder’s family support and for those elders who would otherwise become isolated.

It is challenging for families when elders want to stay in their homes beyond the time they can care for themselves without assistance. Meals On Wheels has helped families by wrapping services around the homebound. One client was not eating, and her family was concerned that she needed to move from her home. When Meals On Wheels started delivering and making daily contact, the woman began to eat and was able to remain at home. Volunteers deliver more than a hot meal, they provide warm conversation and sometimes a warm blanket made by Deupree House residents.



*Joan Rohde*

One volunteer, Joan Rohde, has been delivering Meals On Wheels for 38 years. She loves the sense of purpose she derives from interacting every week with her homebound clients. For some, Joan is their only point of outside contact, and she sees how they look forward to her visit and delivery every

week. Joan sees the impact from her work. Her goal is to keep delivering Meals On Wheels for a total of at least 40 years, and as she says, “And many more, God willing!”

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<i>Total Meals Served</i> .....	<b>76,679</b>
<i>Volunteers</i> .....	<b>80</b>
<i>Clients Served</i> .....	<b>294</b>
<i>Neighborhoods</i> .....	<b>25</b>
<i>Department of Agriculture Audit Score</i> .....	<b>100%</b>
<i>Council On Aging Audit Score</i> .....	<b>100%</b>
<i>Board of Health Audit Score</i> .....	<b>100%</b>

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**VOLUNTEERS**

ERH volunteers generously donate thousands of hours of their time and talents each year. They help with tasks ranging from delivering meals to teaching a class. Volunteers are found among the good Samaritans in the community, residents’ family members, as well as our own residents and staff. The ERH Board of Directors is also incredibly involved and dedicated. The Board volunteered a combined 1,994 hours throughout 2014.

This generation of ERH residents has been giving back to their communities since they helped their parents plant Victory Gardens. They’ve fought social injustice, they’ve eased suffering, and they’re not about to stop now. Residents of ERH are delighted to discover not only that they don’t have to stop, but that volunteerism is encouraged here. “Volunteering is fun; I think maybe I’m selfish,” says Grace Ulm, Marjorie P. Lee resident and volunteer who transports fellow residents to and from their memory-care therapy. “Maybe instead of volunteering, I’m just enjoying myself.”

While St. Paul Village (SPV) has more than 200 volunteers from the community, the SPV staff and residents took notice of one resident and recognized him for his commitment to their recycling program. Every morning George Dinkel collects the recyclables from all five buildings and takes them to the recycling dumpster. What an example of enriching the community where you live!

The ERH staff members volunteer their time beyond work tasks in many ways each year. This summer, a small army of volunteers transported the residents of Amstein House from Marjorie P. Lee to Hyde Park Square for some delicious Graeter’s ice cream. The parade of wheelchairs stretched for blocks, turned heads and stopped traffic. Thanks to our staff volunteers, residents enjoyed a cool treat and a bit of sunshine on a warm afternoon.

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<i>Hours Volunteered at ERH Communities</i> ....	<b>15,673</b>
<i>ERH Board of Directors Volunteer Hours</i> .....	<b>1,994</b>
<i>Total ERH Volunteer Hours</i> .....	<b>19,037</b>
<i>Calculated Cost If Volunteers Were Paid..</i>	<b>\$609,975</b>

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A VIP reception and screening of “Glen Campbell— I’ll Be Me” was hosted at the Cincinnati Art Museum.

**COMMUNITY EDUCATION**

ERH staff often share their expertise on a variety of senior living topics with community organizations and groups across Greater Cincinnati and Southern Ohio.

ERH, in partnership with the Alzheimer’s Association – Greater Cincinnati Chapter, hosted private screenings of the award-winning documentary “Glen Campbell—I’ll Be Me” to draw attention to the challenges we all face in the battle against Alzheimer’s disease. Glen Campbell and his family set an example, and the movie brings home the idea that those who are stricken are not completely lost. ERH remains on the forefront of dementia care and is piloting exciting non-pharmaceutical therapies that show promising results. ERH offers memory-care services at its Marjorie P. Lee and Deupree House communities.

Guests Attending “Glen Campbell— I’ll Be Me” Screenings..... 390

The sold-out crowd at the Parish Health Ministry event “Refresh Your Soul” was inspired to learn more about health as it relates to spirituality. More than 500 conference-goers heard the messages of two speakers including the keynote speaker Eben Alexander, M.D., and Richard Johnson, Ph.D. Alexander, the author of “Proof of Heaven” touched their hearts and encouraged the faith of so many people and Johnson, the second speaker, challenged attendees to consider their spiritual strengths. Both presentations encouraged attendees to embrace life’s struggles as part of our journey.

*Total Reached through Community*

<i>Education .....</i>	<b>2,255</b>
<i>Speakers Bureau &amp; Other Events.....</i>	<b>523</b>
<i>Deupree House &amp; MPL Events.....</i>	<b>951</b>
<i>Refresh Your Soul Event .....</i>	<b>528</b>
<i>Students Reached Through Educational Affiliations .....</i>	<b>253</b>

If you would like to support our mission in 2015, your gift—financial or otherwise—is always appreciated. For more information on how you can help shape ERH’s ministry, contact Diane Decker, Director of Fund Development, at (513) 272-5555 ext. 4283 or visit our website at [corporate.episcopalretirement.com/charitable-giving](http://corporate.episcopalretirement.com/charitable-giving).



# 2014 Community Partnerships

As part of its mission to improve lives, ERH actively develops and supports ministries that benefit thousands of individuals each year. To request a copy of the donor list in print, please contact the Fund Development office at (513) 272-5555 ext. 4283.

## Foundation Partners

The Cincinnati Foundation for the Aged

H.B., E.W & F.R. Luther Charitable Foundation

John A. Schroth Family Foundation

PNC Foundation

Rindsfoos Foundation

Cambridge Rotary Club Foundation

The Kuntz Foundation of the Dayton Foundation

Ohio Capital Impact Corporation: Carol Mount Peterson Resident Development Fund

Walter A. Pfeifer Foundation

## Organizational Partners

### Gifts of \$5,000 and above

Black Stone Group, LLC

Episcopal Diocese of Southern Ohio

Henkle Schueler & Associates

Lutheran Benevolent Society

Medpace

Model Group, Inc.

Ohio Capital Corporation for Housing

PNC Financial Services Group

U.S. Bancorp Community Dev. Corp Tax Credit Investment

### Gifts of \$2,500–\$4,999

Calvary Episcopal Church

Christ Church Cathedral, Cincinnati

Colgate-Palmolive

Episcopal Church of the Redeemer, Cincinnati

Gallagher SKS

Multi-Craft

Premiere Vending, Inc.

Ridge Stone General Contractors

Rotary Club of Cambridge, Ohio Foundation

Skilled Care Pharmacy

### Gifts of \$1,000–\$2,499

Bahl & Gaynor Investment Counsel

Church of the Good Shepherd, Cincinnati

Cincinnati Health Care Associates

Cleriti

Collier Nursing Services

Cors and Bassett

DeBra-Kuempel

Frost Brown Todd LLC

Graydon Head & Ritchey, LLP

Gwen Mooney Funeral Home

Healthcare Advisory Network LLP

Hyde Park Community United Methodist Church, Cincinnati

J.J. Detweiler Enterprises

Locey, Cecil & Associates

Millenium Business Solutions

NextStep Networking, Inc.

P.I.P.E. Inc

Pinnacle Financial Advisors LLC

Planes Moving & Storage

Plante Moran, PLLC

RDL Architects

Schwab Charitable Fund

St. Andrew's Episcopal Church

St. George's Episcopal Church, Dayton

St. Mark Episcopal Church, Dayton

St. Paul Lutheran Church

St. Paul's Episcopal Church, Oakwood

St. Thomas Episcopal Church, Terrace Park

Venue Magazine

Ziegler Senior Living Finance

# Living Legacy Society

ERH recognizes those who have made legacy gifts to our organization, an ERH program or community.

Anonymous (2)	Mrs. Phyllis S. Hopple	The Rev. and Mrs. William E. Rathman
Mrs. Carol Benton	Kathy Ison-Lind	Sylvia Wicker Reid
Mrs. Ellen A. Berghamer	Kathy and Tom Kahle	Mr. and Mrs. Paul J. Scheper
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	Sue and Tom Pontius	

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*Legacy gifts include bequests, charitable gift annuities, charitable trusts, gifts of real estate, life insurance or retirement assets. For more information or to make a correction to the list, please contact Episcopal Retirement Homes Fund Development office at (513) 272-5555 ext. 4224.*