



Summer 2023

INSIDE: 2022 ANNUAL REPORT

Linkage



A Window into a Life

Writers from the Marjorie P. Lee memoirs club document all that remains most vivid

**TOP
WORK
PLACES
2023**

Cincinnati.com
The Enquirer

**PROUD WINNER
14 YEARS**

ERS

Episcopal Retirement Services

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ON THE COVER

Members of the Marjorie P. Lee Memoirs Club, Kate and Jim Powers (seated), Dan Wheeler, Anne Harrison, Bill Woods, and Vivian Kline. Photograph by Gary Kessler

ERS Communities & Services

Premier Retirement Communities

Deupree House, Marjorie P. Lee, and Episcopal Church Home

Affordable Living Communities

32 locations in Ohio, Kentucky, and Indiana. For more information on these communities visit AffordableLivingbyERS.com.

Community Services

Deupree Meals On Wheels, Living Well Senior Solutions, Parish Health Ministry, The ERS Center for Memory Support & Inclusion



ERS Board of Directors

Albert Smitherman, Chair

Dora Anim, W. Thomas Cooper, The Rev. Darren Elin, Trez Folger, The Rev. John Fritschner, JoAnn Hagopian, Gregory Hopkins, Eric H. Kearney, The Rev. John F. Koepke, III, Gerron McKnight, Jennifer Payne, Thomas Regan, Tom Retford, Anne Wilson, Bill Woods, Chip Workman, Elizabeth A. Zwilling

ERS Foundation Board of Directors

JoAnn Hagopian, Chair

Jon B. Boss, Anthony Bruns, Laura R. P. Lamb, Roy Mitchell, Apryl Pope, Thomas Regan, Chip Workman

ERS Mission

Since 1951, Episcopal Retirement Services (ERS) has worked to enrich the lives of older adults in a person-centered, innovative and spiritually based way.

We Welcome Your Comments

The Linkage Editor

Episcopal Retirement Services

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(513) 271-9610 • info@erslife.org

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Linkage is Available Online

To better serve you, Linkage magazine is available via email and on the Episcopal Retirement Services website at EpiscopalRetirement.com. If you would like to be removed from the Linkage mailing list, please call (513) 271-9610 or email us at info@erslife.org.

Make A Donation Online

For your convenience, donations are accepted online at ersfoundation.org

Linkage is a resource to address issues and interests of older adults, providing a link between ERS programs and the community. ERS is dedicated to improving the lives of older adults from all faiths through innovative, quality living environments and in-home and community-based services delivered by experienced and compassionate professionals.

Read our Linkage Blog at erslife.info/LinkageBlogERS.

Listen to our Linkage Podcast at erslife.info/LinkagePodcast.



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Top Workplaces Cincinnati honors the ERS commitment to building a meaningful culture



Team members at Marjorie P. Lee celebrate our 14th Top Workplaces win, from left: Goleta O'Neal, Gertrude Pearson, Kenroy Scott, Loretta Colwell, LaShawna Jones, and Adrienne Coggins.

In 2023, ERS was excited to be nominated for a workplace engagement awards program. Energage, the survey operator, invited our team members to complete a 24-question survey and measure ERS culture compared to other organizations.

The Enquirer announced in June that ERS had won Top Workplace Cincinnati honors for the 14th straight time. The award is based solely on the feedback of team members, the sole deciders of whether a company culture merits recognition. Many of our team members participated, and ERS is grateful for their input. The award is a coveted honor, mainly because the judges were ERS team members.

“Being named a Top Workplace is a big deal — only 144 companies made this year’s list. We are one of only three organizations that have won the award in all 14 years of the existence of this contest. We feel honored, especially because the judges were our ERS team members,” says Joan Wetzel, ERS vice president of human

“I get to enrich the lives of others and it feeds my soul. I have made wonderful friends with residents and co-workers and feel like I am part of something bigger.”

— Why one employee loves working at ERS

resources and organizational development.

“We fully recognize that our team members can work anywhere. We are grateful to have them on the ERS team, and we thank them for sharing their many talents to fulfill the ERS mission,” Wetzel says. ■

— Kristin Davenport

Meet the Board

ERS board members bring a wide range of skills and experience to the organization. They kindly devote their free time, creative energy, listening ears, and kind hearts to help ERS excel in its mission to create high-quality communities and programs for older adults. Volunteer board members commit to serving and offering expertise, leadership, compassion, and generosity to enhance the quality of life for ERS residents and clients. The range of perspectives and experience on our board means we can be a positive force for change in our community.

By Kristin Davenport



Photograph by Laura Sioux

Albert Smitherman

ERS Board Chair

Occupation? President and CEO of Jostin Construction.

Other ERS involvement? Leadership & Nominating Committees.

How long have you been with ERS? Since 2015. My friend and former Board member, Trish Martindell asked me to join, thinking I would add value in providing a diverse perspective to a developing culture of diversity, equity, and inclusion.

Most rewarding part? I enjoy the interactions with both the residents and staff. Both remind me of the many aging family members my parents supported in their homes as I was growing up and the wonderful care provided to them by caring staff that came into their homes. Also, as the Chair of the Board, I enjoy working with the CEO and her senior leadership team. They are supportive, collaborative, and enjoyable to work with.

What is something people might not know about you? I enjoy a good, full-bodied cigar with a Gray Goose and lemon.

What do you do in your free time? Family is important to me. I do date nights with my wife weekly and take power walks with her three to four times a week (whether I want to or not). I also enjoy movie nights with my daughter on Sundays.



Eric H. Kearney

ERS Board Member

Occupation? CEO & President, Greater Cincinnati & Northern Kentucky African American Chamber of Commerce. Attorney.

Areas of Expertise? Small Business. Government Relations.

Something people might not know about you? I've run eight marathons. I'm a fanatic about F1.

Why do you volunteer on the Board? ERS provides a wonderful, supportive environment. It did so for my mother. I serve out of gratitude.

Most rewarding part? I've recommended a few friends to ERS communities and I'm proud of the service the families have received.

Favorite Cincinnati destination? First, Winton Woods because it is a park that I walked when I was a boy. I enjoyed walking in the woods and along the trails. Second, The Cincinnati Art Museum and Contemporary Arts Center.

What do you do in your free time? Play squash, read, and whatever my wife, Jan-Michele Lemon Kearney, has planned.



Tom Retford

Alternate Representative Board Member, Deupree House Resident

What is your professional background? I retired from Cincinnati Fan and Ventilator company, manufacturer of air moving equipment using electric motors up to 200 horsepower. During my career I spent many years in R&D and in plastic and steel product development, finishing my work career as the Computer Systems VP.

Why do you volunteer with the ERS board? During the pandemic, as the Chairman of our Wine Club, I delivered wine to residents. I developed friendships and have a sense of what is important to them, which will help with my board membership.

What is something people don't know about you? I am a first-generation American on my mother's side. She was born in the Banat region (German ancestry) of Austria-Hungary and came to the U.S. as a 2-year-old.

How do you spend your free time? Playing bridge, reading online books, and watching historical fiction movies on TV.

Favorite Cincinnati destination? Ferrari's Little Italy and Bakery in Madeira.

Taking Time to Reminisce

Marjorie P. Lee residents revisit chapters from their past while writing and sharing memoirs *By Mike Rutledge*

Writers of varying skills — most quite talented — gather monthly at the Marjorie P. Lee (MPL) retirement community in Cincinnati's Hyde Park neighborhood to share with a welcoming gathering of friends the latest memoirs they have written.

Sometimes the memories are from seemingly ordinary days. Others recall extraordinary times in history, such as when the Rev. Martin Luther King Jr. delivered his "I Have a Dream" speech.

Many memories were stirred when MPL resident Bill Woods read a memoir he wrote about working as a young adult for the Charter Committee in Cincinnati, a political organization that ran candidates for local public offices.

Woods wrote about helping a campaign door-to-door in 1963 for Theodore M. Berry, who in 1972 would become Cincinnati's first Black mayor. Woods was working at Charter headquarters on the day of the historic March

on Washington on Aug. 28, 1963, when a supervisor invited him into his office to watch it on television.

"I was lucky enough to hear the Rev. Martin Luther King Jr. deliver his 'I Have a Dream' speech that afternoon. His soaring rhetoric caught my imagination, and I unconsciously realized that I was watching and listening to an important moment in our history."

Woods continued, "Hearing King's words ring out to a huge audience would help me realize public life and politics at their best could help bring about a more just and caring society."

After Woods finished, a longtime group member Dan Wheeler told Woods: "I was at the March on Washington. It was my 21st birthday. But I made it. An important occasion."

Jim Powers, another member who shared entertaining stories of his own, noted he was driving a Black youngster who was a Boy Scout in the Adirondacks that same



Marjorie P. Lee residents Kate and Jim Powers, both writers, enjoying hearing memoirs from their neighbors at the monthly gathering.

Photographs by Gary Kessler



Marjorie P. Lee resident and longtime group member Dan Wheeler shares his writing about Midjourney, a generative artificial intelligence program.

day, and they heard the speech on the car radio. Powers was moved by the young man's reaction to hearing such eloquent words about the important topic of Civil Rights.

This is the Writing Our Memoirs Group, which meets the third Monday of each month at 3 p.m. and has existed since late 1998. Their work includes various forms of writing, including essays, poetry, and prose that's quite poetic and plainspoken, often humorous, with memories of themselves, their parents, and siblings.

Many participants use writing as one way of living purposefully and to preserve memories for future generations of their families or siblings.

Group member Anne Harrison read a prose memoir at a recent gathering, reflecting on memories of rowing a boat on a lake in the Adirondacks as a girl with her brother Peter. But her descriptions in her story "Green Rowboat" were very poetic, setting an easy-to-picture scene.

Only lightning or very heavy rains could stop her and Peter from being in that flat-bottomed boat once they passed their swimming tests. She recalled exploring the lake's coves, islands, and streams that flowed into it. Giant hemlock trees and white water lilies overhung a beautiful waterfall with a lovely fragrance.

"Hearing King's words ring out to a huge audience would help me realize public life and politics at their best could help bring about a more just and caring society."

— Bill Woods, writing about getting to hear the Rev. Martin Luther King Jr. deliver his 'I Have a Dream' speech.

"The sun coming from the trees created a special green-golden light and made the ripples sparkle," she said. "It was an endlessly beautiful and magical place."

To those considering writing their memoirs, Harrison offers this simple tip: "Just do it. You've got to start somewhere. Just start writing." ■

ERS Reocgnizes the 2022 Martindell Award Winners

By Kristin Davenport

Once again, Episcopal Retirement Services (ERS) has honored non-management team members who go the extra mile to exemplify our person-centered values and actions with the Martindell Award.

The late Trish Martindell, a former ERS board member, established the award program in 2013. Her inspiration was her father's caregivers at ERS. She was moved by the way they enabled her father, John Wahlberg, to live out his last years with dignity.

Trish passed away unexpectedly in 2016, and we miss her presence at ERS. But we are honored that her legacy lives on at ERS through this exceptional award.

In 2022, after a two-year pandemic hiatus, the award nomination response from ERS residents and families was amazing. It was very difficult to pick a winner from so many deserving nominees.



Trish Martindell
1948–2016

The Martindell family studied each nomination carefully and decided that this year it would be appropriate to give the award to two deserving team members.

Congratulations to honorees Bryan Lusane, Housekeeper, Deupree House (20 years with ERS) and Cordell Boyd, Housekeeper, Marjorie P. Lee, (nine years with ERS).

Lusane and Boyd were recognized personally in November, and each received a \$1,000 check presented by Jack and Kim Martindell. ERS thanks them for putting residents first. Here's more about the winners and why they are deserving of recognition.

Bryan Lusane

Housekeeper at Deupree House in Cincinnati, Ohio. Bryan has been with ERS for 20 years. Some of the sentiments shared in Bryan's nominations include:

"Bryan goes way beyond his housekeeping duties to help DH residents with their computer, phone or TV problems."

"Bryan exemplifies the ERS core values and provides the highest form of customer services to our residents and our staff."

"Bryan is kind and always willing to help. We would be lost without his talent."



From left: Bryan Lusane
and his manager Nick Trotta

Strong Competition for the Martindell Award

Last year, ERS residents and their families made more than 60 nominations of non-management ERS team members who exemplify person-centered, dignified care. This year, we're eagerly anticipating a similar number of nominations.

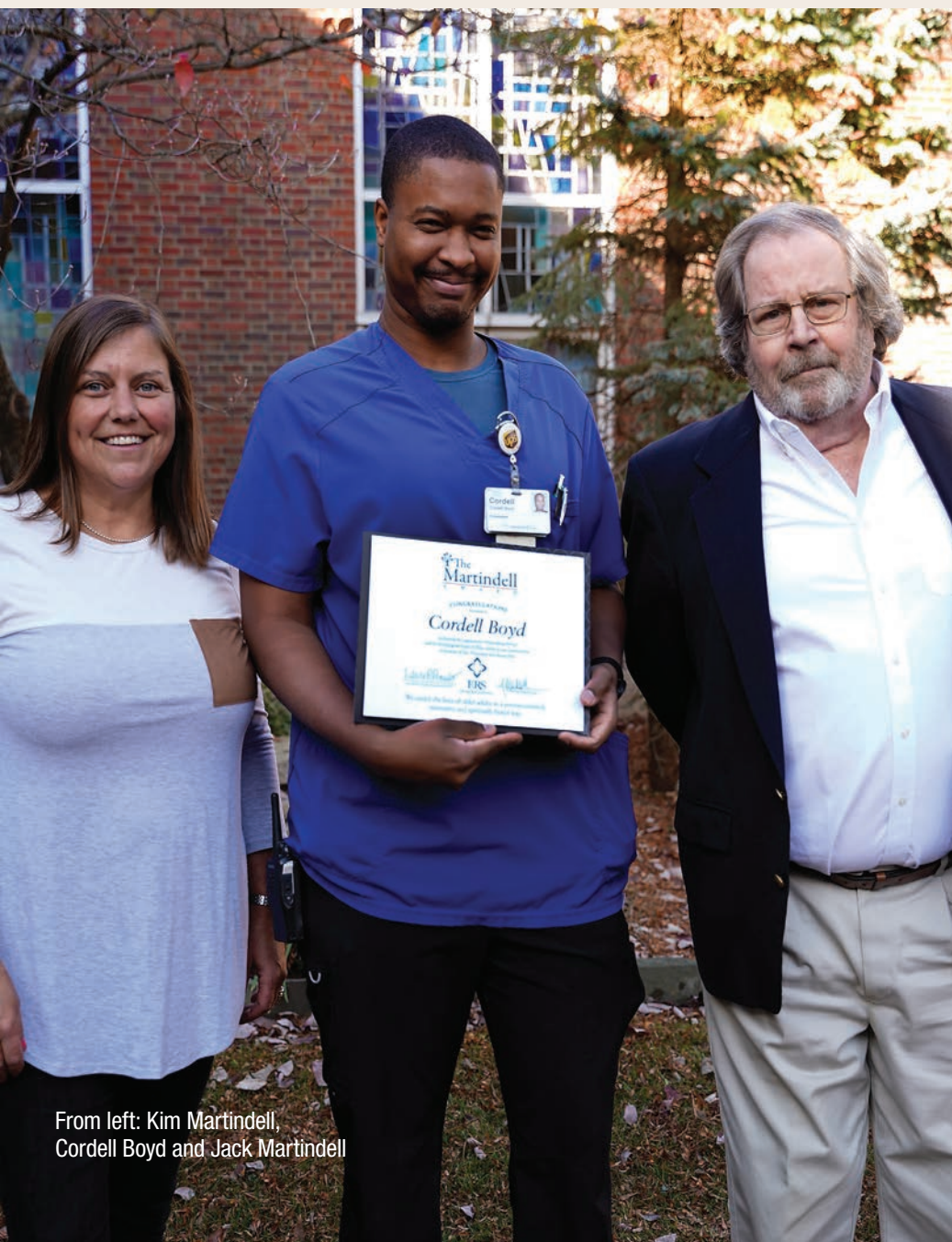


Nominations Open: July 1-Aug. 4, 2023
erslife.info/MartindellAward

The Martindell Award has become known, among ERS team members, as quite a prestigious honor.

If an ERS team member has made your stay, or your loved one's stay, a loving, dignified care experience, then we want to know.

Please consider taking time to nominate your favorite team member for The 2023 Martindell Award. And stay tuned in September — we may announce your nominee as this year's winner!



From left: Kim Martindell, Cordell Boyd and Jack Martindell

Cordell Boyd

Housekeeper at Marjorie P. Lee Retirement Community in Cincinnati, Ohio. Cordell has been with ERS for nine years. Some of the sentiments shared in Cordell's nominations include:

"Cordell is consistently willing to help any resident or staff member in any way and always with a sweet smile."

"Cordell makes an effort to connect with residents and ask how they are doing. He always asks if there is anything he can do to help."

"Cordell quietly goes above and beyond to make things work at MPL... doing his housekeeping, setting up for events, cleaning carpet – you name it, he does it...his quiet dedication should not go unnoticed."



The Gatherings for Good Gala Series is hosted by ERS team members and supporters. Pictured from left: Joy Blang, Bryan Reynolds, Jeff Lamb, Jimmy Wilson, Laura Lamb, JoAnn Hagopian, Emerson Stambaugh, Beverly Edwards, Richard Zinicola, Linda Holthaus, Madeleine Kipperman, Kristin Davenport, and Susan Cleverly.

Be Our Guest

By Mike Rutledge

Episcopal Retirement Services wants you to be our guest at the 2023 Gatherings for Good Gala Series, with all new themes and venues this year.

Two Gala events are left, following the June 15 Sponsor Appreciation Night Backyard Bash that happened at the home of board member JoAnn Hagopian and her husband Gary in Mount Lookout.

“Our goal was to create intimate events where our guests can have meaningful interactions with one another in fun and unique venues and include creative programming that is interesting, entertaining, and insightful into aspects of ERS’ mission,” said Executive Director of Philanthropy Joy Blang.

“These themes are created for their enjoyment, but there’s a reason,” Blang added. “We’re wrapping in things to help guests better understand how their gifts are making a real difference in the lives of the older adults we serve.”

So far, the Gala series has raised \$260,000 through sponsorship commitments. Series Presenting Sponsors are Ohio Capital Corporation for Housing, Model Group, and Ridge Stone Builders & Developers. Supporting Sponsors are Christ Church Cathedral and Clark Schaefer Consulting.

There’s so much fun to be had, we couldn’t limit it to one night

Here’s what’s next for our Gala events:

■ **Music Through the Ages** happens Friday, Sept. 22, 6:30-10 p.m. at the elegant Cincinnati Club in downtown Cincinnati. It’s an evening of timeless elegance in the glittering Harrison Ballroom, one of Cincinnati’s oldest and grandest ballrooms. Cellist Nat Chaitkin will “de-classify” classical music, from Bach to the Beatles, with surprises along the way.

■ **A Night at the Improv** will be held Friday, Nov. 3, 6:30-10 p.m. in The Carnegie Center in Cincinnati’s Columbia Tusculum neighborhood. After cocktails and a gourmet dinner by Jeff Thomas Catering, performer and director Rodger Pille will lead a professional troupe in light-hearted Improv that also shows some of the thought processes ERS team members go through in their work with those living with Alzheimer’s or dementia.

To register for individual tickets and packages, go to erslife.info/gala, or call 513-979-2308.

Reopening St. Luke's Chapel

Episcopal Church Home marks Master Plan progress with the first worship service in years on Ash Wednesday *By Mike Rutledge*

The sacred space of St. Luke's Chapel reopened this year on Ash Wednesday, its organ stirring delight in people who missed its music and the interdenominational services at the chapel, which is the largest meeting point on the Episcopal Church Home campus.

The chapel had been closed during construction, transforming the continuing care retirement community (CCRC) according to its Master Plan to better meet the needs and wants of older adults, now and into the future.

It was especially appropriate that the chapel reopened on Ash Wednesday, the start of the Lenten season, which is a period of rebirth.

"There is something about just walking through the threshold, and the atmosphere changes completely because of a sense of peace," said Stephanie Holcomb, director of fund development at Episcopal Church Home. "It's a sense of upliftment. I don't even know how to describe it other than this sense of peace is washing over you."

She noted the sermon by the Chaplain, The Rev. Lisa Tolliver, reflected on not trying to do gigantic things for God during Lent but instead making more incremental

changes that stay with you well after Easter.

St. Luke's Chapel is a place where independent-living residents from the ECH Dudley Square patio homes gather alongside ECH team members and with residents of the Morton House skilled nursing and memory care household and Lyndon House Personal Care apartments. People from the outer community also attend services.

"It's bringing everybody in from across the whole campus together at the same time," Holcomb said.

Meanwhile, residents and team members in recent months have been enjoying shopping and chatting at another fun place: The Shoppe at Morton House opened October 2023 in the atrium of the main building.

The Shoppe is open Monday through Friday, 11:30 a.m. to 2 p.m., the general lunch time for team members.

"We sell all kinds of things in the gift shop," said Carolyn Heymann, who volunteers as co-manager of The Shoppe with Wendy Hoback. "We have sundries that the residents may need, such as combs, brushes, Kleenexes, toothpaste, toothbrushes, shampoo." The greeting cards also are very popular. ■



The Rev. Harvey Roberts and Chaplain, The Rev. Lisa Tolliver serve Holy Eucharist at the reopened St. Luke's Chapel on the ECH campus.

Lyndon House is Now Open

The new Personal Care building is part of the Episcopal Church Home 10-year Master Plan. *By Mike Rutledge*

Lyndon House, the Personal Care household at Episcopal Church Home, is now open and accepting residents to its new, beautiful living spaces at the premier retirement community.

The opening creates a new level of comfort for residents of the Episcopal Church Home (ECH) campus.

“This is the first time in the history of ECH that we’re offering apartment-style living, and that’s huge for our community,” said Beverly Edwards, vice president of residential health care. For more than 140 years, ECH has been enriching the lives of older adults in a person-centered, innovative, and spiritually based way.

The campus also is expanding with 25 newly built patio homes, with move-ins to them starting this summer. Among other attractive additions are a lovely amenity garden with a patio area and peaceful gazebo where people can gather and chat.

Personal Care, also known as assisted living, can help older adults maintain their independence longer by providing personal care services in an apartment-style setting. Personal Care Memory Care is offered on the ECH campus, as well, for Personal Care residents who are also experiencing cognitive loss.

Episcopal Church Home also provides skilled-nursing neighborhoods for residents who need long-term care or short-term rehabilitation.

The Continuum of Care

A significant advantage of living in a CCRC like ECH is that residents have the first opportunity to move to higher levels of care when their healthcare needs change.

Many people begin living independently on the ECH campus in the Dudley Square patio homes.

For people moving from a patio home or from their own residence off the campus, the transition to apartment-style living at Lyndon House will be a more comfortable change for them than it would be if they were moving into a single room, Edwards said.

“Having this middle ground of Lyndon House, and having apartment-style living, makes it nice to have one bedroom, a living-room area, kitchenette,” she said. “It’s an easier transition because you have more square footage.”

And when people downsize to a Lyndon House apartment, they can keep more of their belongings than they could with a single room for skilled nursing.

Skilled nursing residences are intentionally limited to single rooms because when people require that level of



The open kitchen, dining, and life-enrichment spaces in Lyndon House allow residents to live on their terms.

Photographs by Gary Kessler



The luxurious shared living spaces in Lyndon House with a wonderful outdoor patio and seating area overlooking the amenity garden.

care, they need closer supervision and monitoring. The skilled-nursing apartments are comfortable, even though they're smaller, and residents are encouraged to spend lots of time in the shared living areas to socialize with their neighbors.

Lyndon House and the 25 patio homes are being added as part of ECH's \$20 million Master Plan. Both facets were designed to meet the comfort levels of today's seniors and their families.

"We are thrilled to open the Lyndon House to new residents from the greater Louisville community," said

Laura Lamb, president and CEO of ERS, who added that the Master Plan meets the changing lifestyle and health-care needs of current and future residents.

"We are confident that our residents will enjoy this beautiful, luxurious setting along with the person-centered care approach that ensures that residents live life with the care and dignity they deserve in a place that truly is home," Lamb said.

When Dudley Square III is finished, the campus will have 87 patio homes in a friendly area where older residents share camaraderie and a range of activities. ■



The thoughtfully designed one bedroom floor plan is featured in Lyndon House. Tours of the brand-new Personal Care building are now available.

Dear Friends,

2022 was a challenging yet successful year for our organization. Like many not-for-profits, ERS faced several hurdles, but our team rallied as usual. We continued to fortify our core business and looked forward to a new year and vision.

ERS will hold firmly to its mission and look to our core values — Relationships, Integrity, Engagement, Inclusion, Person-Centeredness, and Progressive Thinking — to guide us. The annual report on the following pages highlights our financial position and success stories from a remarkable year.

- Return to some normalcy at our Continuing Care Retirement Communities (CCRCs): We restarted many of our services and programming at Marjorie P. Lee, Deupree House, and Episcopal Church Home in 2022. Residents and staff were delighted to return to many traditions and start new ones. Meanwhile, the construction of Lyndon House at Episcopal Church Home, the comfortable home-like Personal Care apartments, was finalized in December, and the new household welcomed the first residents in January.
- Affordable Living by ERS ‘Culture of Wellness’: In August of 2022, Linda and David Stetson pledged the single largest gift from an individual living donor in the history of Affordable Living by ERS. They gave \$500,000 to launch a five-year pilot program with a significant research component in partnership with Xavier University as a major step forward in creating a comprehensive Culture of Wellness in Affordable Living. The program will include physical, intellectual, social, emotional, and spiritual activities, which are keys to maintaining good health. As residents retain their functional abilities, they may reduce their need for care workers and health aides. The goal is a higher quality of life that keeps older adults engaged in the community, living longer in their homes, and contributing in life-affirming ways.
- Lauren Brown Empowerment Fund: Named in memory of Lauren Brown, a lifelong learner and single Black mother who joined ERS in high school and advanced in her career to become an Affordable Living manager. Lauren hoped to become a licensed nursing home administrator, but our beloved team member died unexpectedly in April 2021 at age 33. In 2022, “Charlene” received the first-ever Lauren Brown Empowerment Award. She is an ERS team member working toward her nursing degree. The empowerment fund gives BIPOC (Black, Indigenous, and Persons of Color) team members financial resources beyond tuition to help them advance their careers. The creation of the award was an offshoot of the ERS We Can Do Better initiative, which aims to improve the lives of people of color. \$194,000 has been pledged toward the goal of raising a \$500,000 Lauren Brown Endowment Fund.

2022 was also a year when ERS renewed its vision statement.

VISION 2030: As recognized inclusive and innovative leaders, ERS is the preferred choice and trusted resource for older adults along the full economic continuum.

We included the word inclusive — a reflection of the We Can Do Better effort — because that’s something ERS wants to have achieved by then. We plan to reach more older adults by growing our middle-market offerings and expanding outreach ministries, such as the ERS Center for Memory Support and Inclusion.

We are continually thankful for our volunteer board’s unwavering leadership and inspiration. To every resident, family member, donor, and partner, thank you for your ongoing support of ERS and our mission. You helped us sustain our commitment to excellence in aging services and senior living communities.



Sincerely,



Laura R. P. Lamb,
President & CEO

Episcopal Retirement Services is expanding its mission to improve the lives of older adults through quality senior living communities and community-based services throughout Ohio, Kentucky, and Indiana.

39,887

Individuals served through ongoing services & support or contacts by people seeking information/education

ERS Ministry Reaches Across the Tri-State in 2022



The Affordable Living by ERS communities

- | | | |
|---|---|---|
| A Canterbury Court | K Green Hills Affordable Living | S Maple Knoll Meadows |
| B Cambridge Heights | L Trent Village | T Madison Villa |
| C St. Paul Village (2)
St. Paul Village I & II | M Walnut Court | U New Carlisle Village (2)
Rachel Court, Sunrise Terrace |
| D St. Pius Place | N Central Parkway Place | W The Manse |
| E Shawnee Place | O Knowlton Place | X Scheper Ridge |
| F The Elberon | P Prairie Oaks Village (4)
Prairie View, Friendly Center,
Quaker & Mulberry Place | Y Woodburn Pointe |
| G Forest Square | Q Westminster Court (3)
Westminster Court I & II,
Esther Tuke | Z Pedretti Place |
| H Parkview Place | R Marlowe Court | |
| I Thomaston Woods | | |
| J Thomaston Meadows | | |

*Parish Health Ministry is on temporary hiatus.

2022 Overview and Financial Report

The financial information below is for the year ending December 31, 2022. This financial information is based on financial data compiled by the staff of Episcopal Retirement Services. Additionally, this information was subjected to independent external audits with final reports for both 2022 and 2021 available upon request.

Condensed Balance Sheet

As of December 31, 2022

Assets	2022	2021
Current Assets	\$26,053,001	\$26,680,684
Investments and Reserves	\$36,267,261	\$43,250,176
Fixed Assets	\$238,686,643	\$196,090,921
Beneficial Interest in Endowments	\$32,228,658	\$40,834,784
Other Assets	\$6,166,728	\$5,397,460
Total Assets	\$339,402,291	\$312,254,025

Liabilities	2022	2021
Current Liabilities	\$15,702,905	\$17,975,563
Entrance Fees	\$35,570,965	\$31,240,827
Long-Term Debt	\$97,912,668	\$84,058,806
Other Liabilities	\$245,115	\$2,479,364
Total Liabilities	\$149,431,653	\$135,754,560

Net Assets	2022	2021
Total Net Assets	\$189,970,638	\$176,499,465
Total Liabilities & Net Assets	\$339,402,291	\$312,254,025

Condensed Statement of Revenue and Expenses

For the year ending December 31, 2022

	2022	2021
Operating Revenue	\$53,288,115	\$52,022,772
Operating Expense	(\$67,561,388)	(\$64,407,764)
Net from Operations	(\$14,273,273)	(\$12,384,992)

	2022	2021
Non-Operating Revenue (Expense)	\$1,217,660	\$10,392,763
Total Net Loss	(\$13,055,613)	(\$1,992,229)

2022 Contributions and Commitments

\$838,375

*Good Samaritan Mission
Gifts and Grants*

\$123,980

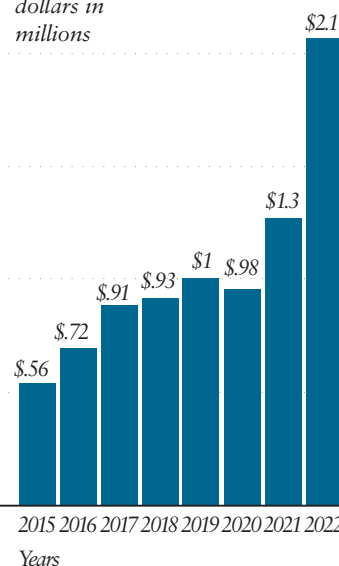
*Realized Planned Gifts
in 2022*

\$1,117,955

*Capital Gifts and
New Programs*

Growth in Giving to Good Samaritan Mission

*Donations,
dollars in
millions*



The Good Samaritan Mission Fund

\$2.48 Million

Total Ministry Costs

\$1.22M

Resident Financial Aid

\$468,852

Affordable Living by ERS

\$235,855

Spiritual Care

\$79,821

The Staff Assistance Fund

\$26,833

Volunteer Coordinators

\$25,786

Community Outreach programs

\$5,696

Partners In Care Fund

\$0*

Deupree Meals On Wheels

*The program maintained delivery costs and staff levels while reimbursement increased. Therefore, 2022 ministry costs were \$0.

Ministry for residents or through ongoing support

3,983

People served as residents or through ongoing support

2,111

Affordable Living Residents

660

Deupree Meals On Wheels Clients

442

Skilled Nursing Care Residents

334

Independent Living Residents

163

Middle Market Residents

77

Personal Care Residents

77

Living Well Senior Solutions Clients

12

Pete's Eats Clients

107

Student Educational Experiences

Ministry through community outreach

35,904

Number of contacts by people seeking information/education

32,012

Linkage Online Blog Views

1,105

Linkage Online Podcast Listens

769

Episcopalretirement.com Resources Accessed

1,773

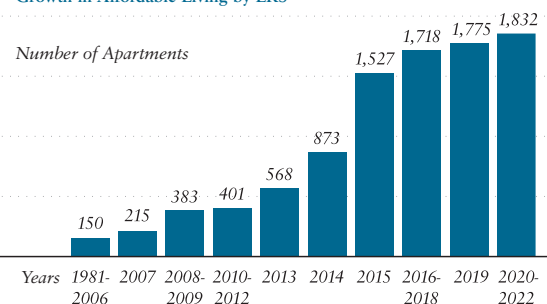
ERS Center for Memory Support & Inclusion Contacts

245

Community Outreach Education Contacts

Growth in Affordable Living by ERS

Number of Apartments



Building Meaningful Relationships

Deupree Meals On Wheels volunteer Patricia Schroer capitalizes on the opportunity to interact with clients. *By Mike Rutledge*



Deupree Meals On Wheels volunteer Patricia Schroer, left, picking up meals from Program Coordinator Katie Dzombar.

Patricia Schroer, a former CEO at Mercy Health's Anderson Hospital, has been retired about 10 years. For the past four, she and her sister, Diann Cox, have been making 'house calls' one day a week, delivering Deupree Meals On Wheels to older adults.

The pair deliver to between four and 14 homes, including to one man they have visited since they started.

"So many of them, they're poor or they're disabled, or they're underserved in some way. Or maybe they're just elderly and they're not able to fix their own meals," she said. "But that's just one facet of it."

For many they visit — more than half, she estimates — they are the only people they see in a week.

"It's really important, I think, to allow them that time to have some interaction with someone else, and to try to build a meaningful relationship," Schroer said.

Aside from being rare human contact, they also are an important part of the social safety net.

They have called family or social workers in cases when they found people who were unable to leave their

chairs or had other needs that were going unnoticed.

"We definitely check in on them. I have so many examples of times when I've called their relatives, I've called their caseworker, because I've just been concerned, and I thought, 'Oh my goodness, someone needs to be here, help them.' Or they're in their wheelchair, and they're unable to get to whatever they need to get to."

Their regular conversations with food recipients are usually much more pleasant.

"We just enjoy it so much, and I really feel so blessed to be able to interact with them, and hopefully they feel a little lucky to be able to have the opportunity to interact with others. I know they're grateful for the food. I know they are, beyond any measure."

Schroer was CEO at Mercy Anderson for 12 years, and thought she would like to do Meals On Wheels because the values and ministries are similar.

As for those she visits, "I'm glad we can maybe bring a little bit of light to them," she said. "They certainly bring it to us." ■



Helping Cincinnati Police

Center for Memory Support and Inclusion is training Cincinnati police to communicate with people living with Alzheimer's. *By Mike Rutledge*



Debbie Serls, a social worker for the Cincinnati Police, left, and Shannon Braun, Director of the ERS Center for Memory Support and Inclusion, are leading a program that trains Cincinnati Police to communicate with people living with Alzheimer's or Autism.

Shannon Braun, Director of the ERS Center for Memory Support and Inclusion, has been making Cincinnati a safer place for people living with Alzheimer's disease and other forms of dementia by training the city's police to better communicate with them.

People with memory disorders sometimes are unable to answer officers' questions promptly or at all. They sometimes cannot obey orders because their brains are not processing what is being said to them. Sometimes they hallucinate or believe they are somewhere they are not.

Just because they're not responding doesn't mean they're being disrespectful, Braun has been telling detectives and other police. She has trained about 50 officers so far through a three-year \$150,000 federal grant from a program Cincinnati calls GRASP. This new program is training Cincinnati police to know how cognitive loss can affect a person's ability to follow commands. Others are training Cincinnati police about people with autism under the same program.

At a time when numerous citizens have been killed nationwide in recent years during confusing situations with police — and some have called for police departments to hire more social workers — such training can avoid miscommunications that cause injuries or deaths.

Debbie Serls, a social worker Cincinnati hired through a contract using the grant money, works with Braun and others to arrange the training. The GRASP program can also provide tracking devices to families of those with dementia or autism so they can be located more easily.

Part of Braun's message to officers is: "These are de-escalation techniques. They are good communication tips to employ when interacting with anyone," she said. "You're not going to know if a person has Alzheimer's every time that you're engaging with them. It's a disease we can't see, so you must try to figure it out. If it happens to be a mental health crisis, or a substance abuse issue, these strategies will be beneficial, too." ■

With Art in Mind

Cincinnati museums become more dementia-inclusive by training docents about memory disorders. *By Mike Rutledge*



"It's a wonderful thing and has brought docents closer together," said Linda Holthaus, a Cincinnati Art Museum (CAM) docent. Pictured, left, with Shannon Braun, director of the ERS Center for Memory Support and Inclusion, and Sara Birkofer, CAM assistant director of gallery and accessibility programs.

ERS is helping several local museums brush up on their ability to better welcome people with Alzheimer's disease and other forms of dementia.

The museums, meanwhile, have been teaming with the ERS Center for Memory Support and Inclusion (CMSI) to provide programming for people living with dementia and their care partners.

That arts program is called With Art in Mind and it was relaunched in 2022 in partnership with Shannon Braun, director of CMSI, after a pandemic break.

Docents at four museums have worked with Braun to learn how differences in the brains of people with memory loss can sometimes make them behave unexpectedly.

The participating museums are the Cincinnati Art Museum, Taft Museum of Art, the Contemporary Arts Center, and the American Sign Museum.

Braun has educated their docents about how cognitive loss can create challenges for people living with dementia and how they can "go with the flow" in interacting with

them, using the principles of "the 3Rs" (the person with dementia is always Right; we Reassure them; and Redirect the conversation) and Improv techniques.

Docents have learned that while their talks with those living with dementia can be unpredictable, they also can be joyful and fulfilling museum experiences.

"It's a real privilege to bring some joy into their life," said Linda Holthaus, a docent at the Cincinnati Art Museum (CAM). Unlike other groups that visit, those intent on learning facts about an art form, "It's no longer about fact-finding, it's smile-finding, and making them feel safe," Holthaus said.

CAM loves Braun's work because "The more training we can provide to our staff to help them welcome people with different abilities, that gives everyone a better experience," said Sara Birkofer, its assistant director of gallery and accessibility programs.

"What's really important about that is developing that empathy and highlighting that everybody deserves to be at the museum," she said. ■



Connecting Across Generations

Thomaston Meadows residents love helping with summer day camp for youth in Thomaston Woods. *By Mike Rutledge*



Jerry Abney and Toni Mudd, Thomaston Meadows residents, enjoy the joyful interactions with kids from the Thomaston Woods Challenge Island Day Camps.

Two week-long Challenge Island Day Camps provided last year to a group of children at ERS' Thomaston Woods Affordable Living community weren't just a fun educational experience that helped keep students' minds sharp during the summer. They also were an intergenerational bonding experience for older adults in ERS' adjacent Thomaston Meadows community for older adults who helped with the camp.

The camps — Shark Week and Cruise Around the World — lasted 90 minutes per day and included STEM (science, technology, engineering, and mathematics) activities.

"I really enjoyed doing summer camp for these kids," said Toni Mudd, 69, who lives in Thomaston Meadows. "Some of these kids don't get toys. Some of these kids don't have a chance to be creative. And they so appreciate it."

One young girl was standoffish at first and wouldn't have her picture taken with Mudd the first day. But on the last day, "she said, 'Can I please have my picture taken with you? I like you,'" Mudd said joyfully.

The camp interactions "just melted my heart. Kids have

always been my heart, so I really enjoy it," Mudd said.

"There's a couple of them that still come up here and talk to me," she said.

Sue Schindler, service coordinator for the two communities, noticed Mudd and another Meadows resident, Jerry Abney, formed quick friendships with the day campers. Abney put on one girl's fairy wings and ran around the lunch area, to the kids' delight.

"I just had my second open-heart surgery six months ago," Mudd said. "And I told Sue (Schindler) a month or two ago, 'When's day camp? I don't want to miss it.' It gives me a reason to keep going."

The camps this year were scheduled for a week in June and another in July. The camps had other benefits. For example, two children who are home-schooled had chances to know their young neighbors better.

Ohio Capital Impact Corporation funded day- and overnight summer camp programming at Thomaston. Funding also came from the Summertime Kids grant of the Greater Cincinnati Foundation. ■

Creativity Displaces Isolation

At Westminster Court, planned regular social engagement gets residents out of their pandemic seclusion. *By Kristin Davenport*



Residents from Westminster Court in Blanchester, Ohio, are encouraged to join in life enrichment activities that teach healthy habits while offering time to socialize. This deviled egg recipe contest was fun and engaging for those who entered and those who enjoyed the tasty treats.

Many older adults already deal with isolation, and for some, it worsened during the pandemic. In Affordable Living by ERS communities, the staff found opportunities to support residents by making sure the seniors had things in place to keep their well-being, memory, and mental health in check.

At Westminster Court in Blanchester, Ohio, Community Manager Char Bradshaw and Service Coordinator Gayle Porter have watched for signs of memory loss, depression, and anxiety in their residents as pandemic restrictions eased.

“One day, we were all distancing, delivering treats and crafts to their doors to keep them engaged but in their own apartments, then almost overnight, it became safer to gather. Not everyone was ready for that change. Some needed extra support and encouragement,” said Bradshaw.

“We call it ‘Isolation Intervention’ when a particular resident needs some added TLC to get them out of their apartment and back to socializing with their neighbors,”

said Porter. “We plan a calendar full of events — chair yoga, crafts, current events, games, family-style meals — so that there’s an activity for almost everyone. The most popular relate to food and sharing recipes. It’s tasty and educational. We share and learn something new.”

The community for adults aged 62 and older or those with a disability has been undergoing renovation. The first phase, 64 apartments, was completed in 2022. In the second phase, 50 apartments will undergo a substantial \$8.3 million renovation. The apartments have aging-in-place features such as walk-in showers, non-slip flooring, and task lighting.

“We have new residents moving in for the brand-new apartments, but they become engaged and stay because of the supportive culture and close family-like community where people look out for each other and count on the support from staff,” said Bradshaw.

She added, “We know residents are thriving when we see signs that they are bonding with their neighbors.” ■

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The Episcopal Church Home would like to recognize the following contributors for the extraordinary kindness and generosity they have expressed in 2022 through their philanthropic investments of \$1,000 or more.

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The John P. Morton Society celebrates founder John P. Morton by recognizing individuals who have remembered Episcopal Church Home in their estate plans.

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ERS is grateful to the following foundations, corporations, churches and other organizations that made contributions last year.

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The Living Legacy Society recognizes friends who have informed us that they have included ERS in their will, estate plans, or other deferred gift arrangement. We are grateful to these donors for helping ensure that ERS continues to serve older adults for years to come.

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Donor Profile:

Earl Mills *By Mike Rutledge*

Deupree House resident Earl Mills believes a good education is one of the most important treasures people can gather during their lifetimes. His late wife, Jane, shared that belief, and the pair encouraged their children, grandchildren, and even neighbors to maximize their learning opportunities.

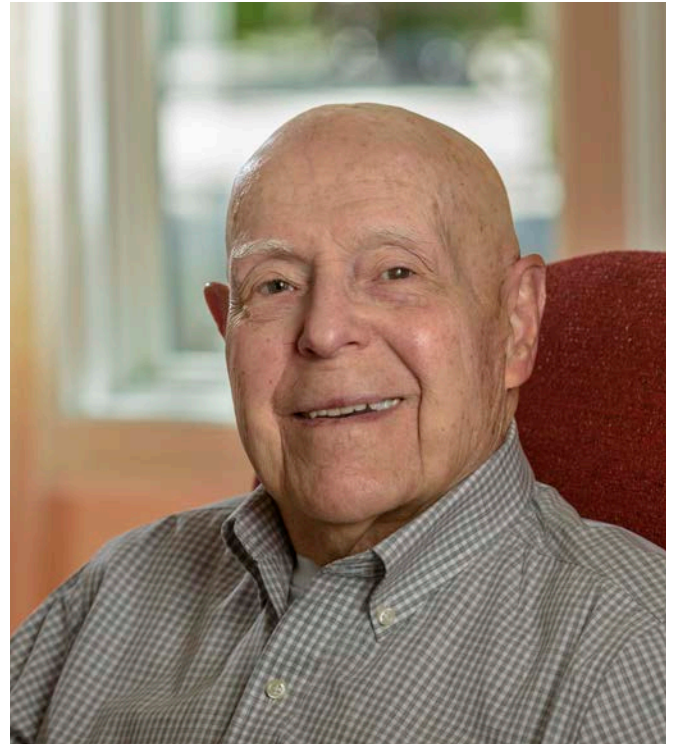
That's one reason Earl felt compelled to generously support the Lauren Brown Empowerment Fund. This newly created fund is intended to empower historically disadvantaged BIPOC (Black, Indigenous, People of Color) team members at Episcopal Retirement Services to gain the education they need to advance in their careers in elder care, with assistance to help overcome obstacles in their paths. The financial help can include unconventional help, such as transportation, childcare, and eliminating other barriers.

"We heard about the Lauren Brown Fund, and I thought, 'Wow, that sheds a new light on scholarships — a very important one.'" Earl said. "Not only do you support the education part of it, but the ability to get the education, which really appealed to us. So that's why we chose Lauren Brown."

Earl and Jane both grew up in small towns — he in Riegelsville, Pa., where as a young man, he crossed the town's Roebling suspension bridge across the Delaware River every day for his paper route — and she in Charters, Ky. Although both came from hard-working families, neither had the financial means to send them to college. So, he served in the Air Force from 1950-54 in Germany and used the GI Bill to earn two degrees, a bachelor's in engineering from Penn State University and a master's in business from Capital University in Columbus.

The pair met in Columbus, where she studied at Ohio State University before stopping to raise their two daughters, Amy and Claudia.

"There's just a good feeling of helping people," he said. "My concern is mainly for the low-income population, which is significant. The most important step in their life is to get an education — as much as they can get, to carry



Earl Mills is a Deupree House resident and recent donor to the Lauren Brown Empowerment Fund.

them through that difficult part of their life."

"That way," he added, "you can get a job you like, and do something you're interested in, and be productive, be creative, be examples for your community."

That has worked out for the Mills family, many of whom have followed in Earl's engineering and philanthropic footsteps. Early in his career, he became interested in biomedical engineering. After a couple of jobs, he moved to Cincinnati where he developed the biomedical division of SENCO in Newtown, designing and producing skin staplers and internal-organ staplers. That later was purchased by Ethicon, a Johnson & Johnson subsidiary.

One daughter married an engineer, and three of four grandchildren are engineers, including a grandson now working at Ethicon Endo-Surgery, "where I used to work, in the same department," he said with a broad smile.

ERS is grateful to Earl for supporting the ERS mission through his annual gift to the Good Samaritan Mission Fund, a major gift as well as a legacy gift from his estate to the Lauren Brown Empowerment Fund. ■

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