





ERS

Episcopal Retirement Services



2022 Ministry Report









2022 Ministry Report

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Dear Friends,

At ERS we see a strong future for our organization, with a vision to serve older adults and their families navigate to help them positvily age. Let's take a moment to reflect on the year in ministry.

For ERS, it was a challenging, but successful year. Like many not-for-profit organizations, we faced a number of milestones and hurdles during 2022. The ERS team kept its focus, and made lemonade from lemons when needed.

We shared our expertise through strategic partnerships, provided expertise to combat ageism and defy the stigma of dementia. Notable 2022 accomplishments include:



Laura R. P. Lamb

- We Can Do Better (WCDB) initiative: an ERS program launched in response to the killing of George Floyd, we strive to increase diversity and ensure everyone has a voice that is heard. In 2022, ERS issued the second WCDB scorecard, which measures how the organization has progressed since we began this focused work. Related to this accomplishment, significant donations were received for the Lauren Brown Empowerment Fund, and the first recipient of the Lauren Brown Empowerment Award was chosen. The empowerment fund helps BIPOC (Black, Indigenous, and Persons of Color) team members overcome obstacles they face in advancing their careers.
- Episcopal Church Home: In year three of the Master Plan, the campus has been upgraded to meet the desires of older adults, now and into the future. Construction continued on the 25 Dudley Square patio homes. In May we celebrated the construction progress at Lyndon House, the comfortable home-like Personal Care apartments.
- The ERS Center for Memory Support & Inclusion (CMSI): In 2022, CMSI deepened its support for care partners and older adults living with dementia by increasing community training and programs. Director Shannon Braun leads dementia training for the Cincinnati Police Department, which received a grant to teach officers how to interact with people who have dementia or autism.
- Affordable Living by ERS: The development team earned Low-Income Housing Tax Credits to build Pedretti Place, a 48-apartment campus in Delhi Township. We celebrated a ribboncutting ceremony marking the completion of New Carlisle Village in New Carlisle, Ohio.
- Gatherings for Good Gala series: The ERS Foundation presented a series of four inperson events, the first since 2019. Raising more than \$290,000, the gala series benefited the ERS Good Samaritan Mission Fund, which helps more than 14,000 older adults annually.

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 commit to you, and to those we serve, to address the broader community's needs, to provide the highest level of aging services and quality of life for older adults, at all economic levels in our region. Thank you for your continued support. We hope you enjoy these stories on the following pages of our commitment to bettering our cities, towns and neighborhoods.

Sincerely,

LauraRthamb

Laura R. P. Lamb, President & CEO

Living

ERS SERVANT LEADERSHIP TEAM APPRECIATES YOUR SUPPORT!



Dan Steward, Chief Financial Officer



Jimmy Wilson, VP of **Affordable**



Beverly Edwards, VP of Residential

Healthcare



Marketing &

Bryan Reynolds, Megan Bradford, Joan Wetzel, VP of

Public Relations & Ministry



Middle Market



VP of Human Resources & Organizational Development

ERS Ministry

3,983 People served as residents or through ongoing support



35,904 Number of contacts by people seeking information/ education

Enriching Lives

Episcopal Retirement Services works to improve the lives of older adults through quality senior living communities and community-based services in Ohio, Kentucky, and Indiana.

Together We Are Making An Impact In Our Community

| Ministry for residents or through on-going support | Lives Impacted |
|----------------------------------------------------|----------------|
| Affordable Living Residents | 2,111 |
| Deupree Meals On Wheels Clients | 660 |
| Skilled Nursing Care Residents | 442 |
| Independent Living Residents | 334 |
| Personal Care and Assisted Living Residents | 77 |
| Middle Market Residents | 163 |
| Student Educational Experience | 107 |
| Living Well Senior Solutions Clients | |
| Pete's Eats Clients | 12 |
| Ministry through community outreach | Lives Impacted |
| Linkage Online Blog Views | 32,012 |
| Linkage Online Podcast Listens | 1,105 |
| Episcopalretirement.com Resources Accessed | 769 |
| ERS Center for Memory Support & Inclusion Contacts | 1,773 |
| Community Outreach Education Contacts | 245 |

ERS Good Samaritan Mission Fund and ECH Promise Fund



Living with dignity & purpose

\$1.94M ERS Good Samaritan

Mission Fund

The philanthropic support of donors to Episcopal Retirement Services (ERS) is vital to the fulfillment of our mis-

sion to serve older adults in a person-centered, innovative, and spiritually based way.

Since the 1950s, philanthropists have followed the lead of ERS founders Charles and Marjorie P. Lee. During uncertain times, they have ensured that we have the resources needed to enable those we serve to live with dignity and purpose.

As we continue to stabilize, sustain, and grow our organization, this strong legacy of charitable \$.54M ECH Promise Fund

giving and volunteering is what steers the ministries of ERS.

Collectively, ERS' Good Samaritan

Mission Fund (GSM) and The Promise Fund of Episcopal Church Home (ECH) provide \$2.48M in annual charitable support. Thanks to these funds, no resident at Marjorie P. Lee, the Deupree House and Cottages, or ECH ever has to leave their home due to financial reasons.

The GSM provides essential resources to reach thousands of older adults residing in our Affordable Living communities and receiving community-based services as reflected on page 5.

ERS Good Samaritan Mission Fund and ECH Promise Fund

\$1.22M

Resident Financial Aid fulfills the ERS promise that no ECH, Deupree House, or Marjorie P. Lee resident who has outlived his or her resources will ever be required to leave for financial reasons.

\$468,852

Affordable Living by ERS serves lower-income older adults to empower them to live independently with dignity and enjoy safe and enriched lives regardless of their financial situation. We provide them rent-subsidized living that includes a variety of options and services.

\$235,855

Spiritual Care serves the spiritual needs of residents and their families, regardless of their denomination. An integral part of ERS living, it includes staff chaplains and partnerships with neighborhood clergy and lay volunteers.

\$79,821

The Staff Assistance Fund provides financial aid to our most valuable resource, our dedicated staff, through tuition assistance and emergency relief.





\$26,833

Volunteer Coordinators empower Deupree House and Marjorie P. Lee residents to serve in a variety of capacities, including leadership roles. This is within our communities and through outreach programs that positively impact the lives of all those served.

\$25,786

Community Outreach programs promote healthy and fulfilling aging by sharing the expertise of ERS team members, residents, and volunteers. ERS also supports worthy organizations through philanthropic contributions.

\$5,696

Partners In Care Fund improves the lives of ERS residents, giving them comfort and meeting basic daily needs. It provides items such as durable medical equipment, prescription medication, furnishings and necessary services not covered by insurance.

Deupree Meals On Wheels* keeps older Cincinnatians living independently with the help of caring staff and volunteers who deliver nutritious meals and compassionate companionship. They also provide pet food, personal care items and even small appliances to help seniors manage independently in their home.

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

ERS Center for Memory Support and Inclusion

Dancing to Remember is a program that lets people with any level of dementia and their care partners enjoy dancing while easing the stress of their everyday lives. ERS Center for Memory Support & Inclusion, Giving Voice Foundation, and A-Marika Dance Company teamed up to host the free program. Together, we helped people living with dementia and their care partners connect through ballroom dancing.

ERS Center for Memory Support and Inclusion



269
individuals
received
CMSI
dementia
education
&
training

Dancers and guests celebrate the successful Dancing to Remember Program, which concluded with a Dance Showcase.

Dancing to Remember

Relaxing fun and pleasant reminiscing — these easygoing dance lessons give people living with dementia and their care partners something to learn together

Sylvia Burch, a volunteer dancer at the Dancing to Remember program for people living with dementia and their care partners, wishes her late mom could have participated in it.

"She loved to dance," Burch said about her mother. "She would have loved that program, and I think she would have benefited from it."

Dancing to Remember, created by ERS' Center for Memory Support and Inclusion (CMSI) with the Giving Voice Foundation and A-Marika Dance Company in Sharonville, is a free program that offers people living with dementia and their care partners a fun opportunity to learn simple dance steps and then enjoy dancing together. After weekly

lessons, they gather for a party and show their families what they've learned.

"Just lovely, lovely people," said Mary Ramirez Cook, who owns the dance company where the volunteers themselves dance. "And if it helps one little speck of sand worth, it's worth it."

"Dancing to Remember is so joyful!" said Shannon Braun, director of CMSI. "I still feel uplifted and energized by the generosity and patience of the volunteers who joined us. It was inspiring to see the participants gain a bit more confidence each week. I give them credit for trying something new."

The parties at the end had about 40 attendees, including family, in June, and about 60 in December.

Affordable Living by ERS

Affordable Living by ERS



Staff and residents of Canterbury Court in West Carrollton, Ohio, share healthy snacks for the Pirate Pack backpack program. Food-insecure children leave school for the weekend knowing their next meal isn't guaranteed until the next school day. Canterbury Court supports the Pirate Pack program because it provides students a sense of security knowing food is going home with them for the weekend.

volunteers
gave their
time
to help at
Canterbury
Court with
events and
activities.



Volunteers strengthen our Affordable Living by ERS communities and make a difference by sharing time and talents to help our older adults. Spending time together is one of the most meaningful things volunteers can do for our residents.

Make giving part of living

The Canterbury Court residents gather food donations and give their support to local students in need.

The Canterbury Court Affordable Living by ERS community regularly collects food for the backpack program operated by West Carrollton schools, and make other efforts to support the surrounding community.

"We have a barrel that the residents put the food in for the kids," said Jan Velkoff, the community manager at Canterbury. "They distribute the food through the schools to help the kids who are needy."

It's known as the Pirate Pack, after the district's mascot. The backpack food program offers families free groceries for weekends and school breaks. Pirate Packs include healthy, easy-to-prepare food for kid-friendly meals.

"There are some residents who say things like, 'Do you think the kids would like applesauce?" Velkoff said about the excitement residents have, and the sense of purpose. "It's neat."

"Caterbury Court residents also collected scarves and mittens for the homeless in West Carrollton, in December," she said.

Residents also donate \$600 each year to West Carrollton's police and firefighters. That money is raised through bake sales and through a can in the lunch room, where residents place donations.

The benefits of service projects go beyond their initial community impact. Social connection encourages the well-being older adults and their ability to continue living independently.

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Deupree Meals On Wheels

Deupree Meals On Wheels



Edmund and Suzanne McCarter volunteer every week with a warm hello and some friendly conversation that comes with the Deupree Meals On Wheels meal delivery. They are part of a vital lifeline that keeps older adults like Ed Yorgen heathy and socially connected.



129,000 meals were served to 660 clients in 2022

Ed Yorgen is a Deupree Meals On Wheels recipient who had been an active Meals on Wheels volunteer not so many years ago.

Full circle delivery

Couple delivers Deupree Meals On Wheels to a former Meals on Wheels volunteer driver

Thursdays are social times for Edmund and Suzanne McCarter, and the four or five people who receive Deupree Meals On Wheels food from them.

Ed Yorgen, 94, is the person they have socialized with most during their two decades of delivering. He has given them travel tips, such as when they traveled to Alabama, near where he grew up. They've had many fun talks.

"Right away, it was pretty obvious Ed was a social person," Edmund McCarter said.

Deupree Meals On Wheels deliverers don't merely take food to older adults; they also work to make sure they're in good health and aren't struggling. The program helps elders remain in their homes as long as possible.

Ed and his late wife, Janet, delivered Meals on Wheels, "So he gets it," McCarter said. "He was probably the easiest we've ever had to get to know, meaning that he wanted to talk, he was open about it. He understands what we're doing."

Yorgen doesn't cook, and, "As long as I'm able, I prefer staying here, for a lot of reasons," said the father of two who has lived in the same house since it was built 63 years ago. Janet passed away in early 2022.

"I look forward to Thursday mornings, and talking to these two," Yorgen said.

Affordable Living by ERS

Affordable Living by ERS



The Central Parkway Place community credits the drop in crime to the new security cameras that record what's happening in hallways, hidden outside areas, and nearby city property. The cameras were funded by a \$25,000 Ohio Valley Foundation grant.

2,111
residents
lived in
Affordable
Living by
ERS
communities



John Garner, community manager for Central Parkway Place, with VP of Affordable Living Jimmy Wilson. "Creating safe and comfortable communities that benefit the community at large are a priority at ERS," says Wilson.

Safe at Home

Affordable Living by ERS works to make its communities and the surrounding neighborhoods safer

The Affordable Living by ERS community in Cincinnati's Over-the-Rhine neighborhood needed enhanced security measures inside and around Central Parkway Place building. Security cameras and increased police attention have community residents and those in the surrounding neighborhood feeling safer.

John Garner, community manager for Central Parkway Place, said vehicle break-ins, and crimes such as soliciting and trespassing, have dropped in recent months. He credits new security cameras that record what's happening in hallways, hidden outside areas, and nearby city property.

"I think the cameras have been somewhat of a deterrent," Garner said. They also helped identify

visitors who were harassing residents and were identified using camera images.

The cameras have had an "amazing" effect, Garner said. "We've been able to identify things that we need to take care of."

"The residents feel very, very comfortable with the cameras," Garner said.

Cincinnati police "have actually cracked down, so we've noticed there hasn't been any crimes in about the last three, four months," Garner said.

The L&L Nippert Charitable Foundation also granted \$86,104 for cameras to monitor areas around ERS' Madison Villa, The Manse, Walnut Court, Thomaston Meadows and Thomaston Woods communities.

 $\overline{\underline{12}}$

Episcopal Church Home

Engagement and Outreach



native shade trees were planted by Dudley Square Residents

David Arnold, The Rev. Harvey Roberts,, and 20 other Dudley Square residents invested in planting native trees on the ECH Campus.

Planting Trees for the Future

Residents of Dudley Square patio homes come together to plant native shade trees on the campus neighborhood

Some 22 residents of Dudley Square patio homes donated the money to plant 17 trees that someday will be tall, with large canopies of leaves above their neighborhood.

They did so not for themselves, necessarily, as much as for future generations, and the planet.

Participating in a program administered by the Metropolitan Sewer District, residents contributed about \$500 per tree to plant native species whose leaves will create shade, because climate change will cause the region to be hotter than it is now.

If an arborist finds that the trees are healthy several months after they were planted, the residents will be paid back about \$240 per tree.

Dudley Square resident Harvey Roberts said, "Many of the people who put up the money for these trees probably will not be around to see them mature, because it's going to take 20-30 years for most of them to reach maturity," he said.

Another Dudley resident, David Arnold, who grew up on a farm and learned from his father the importance of planting trees for the future, chaired the tree committee: "I'm 84, and the time is rapidly approaching when I won't be around," he said. But: "I'm a devout believer in our planet. We have treated the planet very terribly, and trees are one of the things that can help us."

Deupree House residents donate toys to A Caring Place

Deupree House residents contributed \$1,600 to buy toys for children served by A Caring Place, an organization that supports expectant mothers and families. Another 15 residents contributed toys for the cause.



Deupree House Life Enrichment Coordinator Anna Honerlaw said 50 residents participated in the effort that filled the Deupree House bus.

"This toy drive has become an annual tradition which brings joy to residents and children," she added.

Jody Olson, director of client services at A Caring Place in Mount Carmel, Ohio, says they provide free services and an array of resources for families, including assistance with clothing and other needs for newborns through age 12.

Deupree Cottages residents prepare & share hundreds of goodie hygiene bags



Ronald McDonald House was one of the many local nonprofits to receive goodie hygiene bags in 2022.

DD Farmer, Deupree Cottages Household Coordinator, organizes the resident outreach projects.

The Goodie Hygiene Bags that Deupree Cottages residents prepare for several charitable organizations don't merely create pleasure for the people, such as families at Ronald McDonald House, who receive the gifts. The bags, given to agencies in sets of 25, also please the residents who put items into them.

Resident Eleanor Minkarah said she enjoys helping with the bags because it's a way of giving back, and because of "how much the recipients show their gratitude."

The bags contain such items as socks, tissues, soap, lotion, toothbrushes, toothpaste, pens, note pads, mints, lip-balm and a message that says, "We hope you enjoy this little token of love."

In 2022, goodie bags also went to the Fisher House Foundation, IPM Food Pantry, Dragonfly Foundation, Esther Marie Hatton Center, Lebanon Food Pantry and City Gospel Mission. Dog and cat treat bags also went to Saving the Animals Foundation.

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Giving of Time, Talent & Treasure

LeadingAge Intern returns in 2022

Jenna Reformina, who worked as ERS' LeadingAge intern the summer of 2021, has extended her Cincinnati connection and is earning a master's degree in health services administration at Xavier University, and again is working at ERS. She is from the town of Kaimuki, on the Hawaiian island of Oahu, and received double bachelor's degrees in May of 2022 from Creighton University in Nebraska: health administration and policy, and political science. The LeadingAge internship is a 10-week immersive program hosted by members of the organization. The internship is an effort to ensure that the industry that cares for older adults is as diverse as society itself. As an intern, Reformina shadowed various team members, including nurses, and some administrators. When she learned ERS President and CEO Laura Lamb was among ERS leaders who received Xavier degrees, that began her consideration, she said.



"We are happy that Jenna returned to Cincinnati to pursue her degree and continue to make an impact at ERS and in the community," Lamb said.

Marjorie P. Lee residents make donations for Ukrainian people suffering during wartime



Ann Retford hands off a donation to Father Angelo who delivered everything along with a check to support the people of Ukraine through the work of Matthew 25: Ministries, an international humanitarian aid organization in Cincinnati which responded to the humanitarian crisis in Ukraine.

Marjorie P. Lee residents donated clothing for people in the Ukraine in early 2022, shortly after Russia invaded the country.

Resident Vivian Kline put out a notice, urging my neighbors to help, "and everybody just brought piles," said Ann Retford, a resident who has volunteered on and off for years with Matthew 25: Ministries, which received and disbursed the donations.

After the clothing was collected, Father Angelo Puopolo, chaplain for Marjorie P. Lee, loaded them in his pickup truck and delivered them to Matthew 25.

"They were being bombed out of their everything," Retford said about people of Ukraine after the invasion. "And it's not just now, it's what Matthew 25 does all the time."

\$393,902 calculated costs if volunteers were paid staff, providing valued services



80
leadership
volunteers devoted
2,060 hours
of service
to ensure our longterm success

12,927
views
of ERS
video content.

780 people volunteered to support ERS staff, residents, families, and clients





13,152 total hours volunteered across ERS

9,135 total hours given by volunteers dedicated to ERS residential communities

 $\overline{16}$

ERS Donor Recognition

2022 COMMUNITY PARTNERSHIPS

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

| 0 | | Φ. | |
|-------|----|--------------|--------|
| GIFTS | OF | 520 . | .000+: |

The Ellen A. and Richard C. Berghamer Foundation

The Ed and Joann Hubert Family Foundation

Arthur and Elizabeth Kuhn Fund of Greater Cincinnati Foundation

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

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The John A. Schroth Family Charitable Trust, PNC Bank

The Sutphin Family Foundation

Gifts of \$10,000-\$19,999:

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The Episcopal Church of the Redeemer Jostin Construction

TheKev

Model Group, Inc

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tdg Facilities Services

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Gifts of \$1,000-\$2,499

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2022 EPISCOPAL CHURCH HOME DONORS

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.

GIFTS OF \$20,000 AND ABOVE

Baird Trust William Chandler Good Samaritan Foundation Joanna+ and Dr. William Panning Gordon+ and Nancy Ragan

Gifts of \$10,000-\$19,999

Stockyards Bank

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Gifts of \$5,000-\$9,999

Alvin Cassidy Community Foundation of Louisville ECH Woman's Board Robin Garr and Mary Johnson Dr. John+ and Linda Kiesel Donald and Carol Mead

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Joan Shepler

Gifts of \$1,000-\$4,999

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Morton Society Members:

in their estate plans.

Rev. Georgine Buckwalter Ann Davis Stephen and Barbara Ellis Ben* and Sarah* Few James and Kathy Hendon Dr. Keith Knapp

Robert and Sharon Nesmith Gordon+ and Nancy Ragan Anne+ and John Vanderburgh Virginia and Dr. James Woodward

Rev. Wendell Meyer and Ann Stevenson

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

> Bob Lyon The Lyon Family Fund Jeff and Jeanette March Tom and Pam Mischell

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at 513-979-2308 if you believe an error has been made in the listing of your gift so that we can correct it in future listings

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PLANNED GIFTS REALIZED IN 2021

Anne and Samuel* Wilson

The Estate of Young Bongfeldt The Estate of Joan and Phil Maechling The Estate of Sue and Tom Pontius

- (<) Denotes an individual who joined in 2022
- (^) Denotes a current or former staff member
- (+) Denotes a Board or Committee member
- (*) Denotes an individual who has passed away

2022 SAMARITAN CIRCLE

The Samaritan Circle is comprised of individuals who generously support ERS' annual ministry needs through the Good Samaritan Mission Fund, Emergency Relief Fund, and specific project requests with a donation of \$1,000 or more.

ERS Donor Recognition

2022 LIVING LEGACY SOCIETY

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.

Janice W.* and Gary R. Lubin

Trish* and Jack Martindell

Tom and Nancy McOwen

Robert Evans and Brian Miller

Jane* and Earl Mills<

Cece* and Tom* Mooney

Ken^ and Pam Paley

Eli and Ilona* Perencevich

Joan Trittipo Perkins

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The Revs. Bruce and Susan Smith

Doug^ and Kathy Spitler

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Al Harris

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Jeff and Laura^+ Lamb

Miss Louise Landen

Keith+ and Sue Lawrence

Mr. and Mrs. Robert G. Linkins

The Rev. David Lowry

PLATINUM LEVEL: \$10,000+

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David and Joy^ Blang The Linda and Miles Schmidt Family Wilson Breiel Kathleen+ and Jim Brockman Anthony Bruns+

SILVER LEVEL: \$2,500-\$4,999

Christenson Giving Fund Fidelity

Craig and Kathleen Alexander The Badanes Family Charitable Fund Gaysie Fund of The Greater Cincinnati

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Nancy Ike Caroline James and Stephen Altschul Overbrook Family Advised Fund of Stephen F. Altschul

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(+) Denotes an ERS Corporate, Foundation or Affordable Living Board or Committee Member (^) Denotes an ERS Staff Member (*) Denotes an individual who passed away in 2022, or 2023. Note: Every effort was made to accurately recognize donors for their generous contributions. Please contact the ERS Foundation office

(+) individual served as an ECH Board or Committee Volunteer; (^) individual served as a member of the ECH Staff; (*) individual passed away in 2022, 2023 and prior

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ERS Ministry Reaches Across the Tri-State in 2022



The Affordable Living by ERS communities

- A Canterbury Court
- Cambridge Heights
- St. Paul Village (2) St. Paul Village I & II
- D St. Pius Place
- **E** Shawnee Place
- **F** The Elberon
- **©** Forest Square
- Parkview Place
- Thomaston Woods
- Thomaston Meadows

- **K** Green Hills Affordable Living
- Trent Village
- **W** Walnut Court
- Central Parkway Place
- Knowlton Place
- Prairie Oaks Village (4)
 Prairie View, Friendly Center,
 Quaker & Mulberry Place
- Westminster Court (3)
 Westminster Court I & II,
 Esther Tuke
- R Marlowe Court

- Maple Knoll Meadows
- Madison Villa
- New Carlisle Village (2)
 Rachel Court, Sunrise Terrace
- W The Manse
- Scheper Ridge
- 😲 Woodburn Pointe
- Pedretti Place