



# Linkage

Spring 2016



## *ERS Makes A Difference*

ERS Services Help People Live  
Well Into the Future®

**ERS**

Episcopal Retirement Services



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From left: Peggy Slade-Souders, Anthony Williams, Sue Susskind and Jeanne Palcic. See story, pg. 6. Photograph by Gary Kessler

## ERS Communities & Services

### Premier Retirement Communities

Deupree House | Marjorie P. Lee

### Affordable Living Communities

25 locations in Cincinnati and the Tri-State. For a complete list and more information on these communities visit [AffordableLivingbyERH.com](http://AffordableLivingbyERH.com).

### Community Services

Deupree Meals On Wheels

Living Well Senior Solutions

Parish Health Ministry



## ERS Board of Directors

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Ben Blemker, Wilson Breiel, The Rev. Darren Elin, JoAnn Hagopian, Gregory Hopkins, Thomas W. Kahle, Esq., The Rev. Canon John Koepke, William C. Knodel, Susie Lame, Keith Lawrence, Terry Lilly, The Rev. David Lowry, Trish Martindell, Dr. Mark Meyers, Dixon Miller, Thomas Regan, Dr. Robert Reed, Rich Setterberg, The Rev. Bruce Smith, Gates Smith, Bernie Suer, Margaret Swallow, Larry Williams, Anne Wilson, Randal C. Young

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### We Welcome Your Comments

The Linkage Editor

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### Make A Donation Online

For your convenience, donations are accepted online at [www.EpiscopalRetirement.com/donate](http://www.EpiscopalRetirement.com/donate).

Linkage is a resource to address issues and interests of older adults, providing a link between ERS's programs and the community. Since 1951, Episcopal Retirement Services (ERS) has dedicated itself 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.



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# ERS

Episcopal Retirement Services

## *ERH is now ERS: Episcopal Retirement Services*

By Kristin Davenport

**A**fter 65 years—though *home* is most certainly where our heart is—the core of the newly minted name Episcopal Retirement Services (ERS), replacing Episcopal Retirement Homes, is the portfolio of services we offer.

Beginning last February, a rebranding behind the new ERS took effect, but in reality, the old ERH had long ago transformed into a person-centered family of services.

Services are aligned and woven together to maximize impact. This includes the continuum of care that has perpetually helped residents at Marjorie P. Lee and Deupree House achieve health and independence as they age; a unique range of services at Affordable Living by ERS, which provides safe, comfortable, community living for limited-income older adults in the Tri-State; the combination of in-home and community-based services such as Deupree Meals On Wheels and Parish Health Ministry; and Living Well Senior Solutions.

“We put people first,” says Doug Spitler, ERS CEO. “Always have, always will, and that’s what makes our services best in class. ERS has developed, for more than a half-century, into a premier, innovative, thought-leadership position in our field. Changing our name accurately represents what Episcopal Retirement Services has become, and where we are headed.”

The service behind Episcopal Retirement Services creates an environment that encourages and supports meaningful, consistent relationships through a variety of person-centered interactions. Behind it all: the strength of ERS, a faith-based, award-winning, trusted developer, manager and service-provider for seniors and senior-living communities.

ERS now serves more than 1,500 residents and touches another 12,000 people through the community-based services it provides, including parishioners from 77 churches served by Parish Health Ministry and 300 seniors enjoying fresh, hot Deupree Meals On Wheels. Their resident population continues to grow with the rapid expansion of Affordable Living by ERS, where more than 1,100 low-income older adults now call home. ■

## Another Successful Annual Gala

EPISCOPAL RETIREMENT SERVICES held its Annual Gala on September 25, 2015, at the Kenwood Country Club. The record-breaking event was attended by more than 300 people and raised more than \$130,000. ERS’s Annual Gala, sponsored by PNC Bank, benefited the Good Samaritan Mission, which supports outreach services for older adults. Programs include Residential Aid, Deupree Meals On Wheels, Partners In Care Fund, services for limited-income seniors, and employee hardship assistance.

Mike and Digi Schueler were recognized as the 2015 Annual Gala honorees in acknowledgment of the impact they have had on the growth and success of ERS and to the entire Greater Cincinnati community through their commitment to leadership. Our 10th Anniversary ERS Gala will be held on Friday, September 23, at the Cooper Creek Event Center in Blue Ash. Bishop Thomas E. Breidenthal of The Diocese of Southern Ohio will be our honoree. —K.D.



Doug Spitler, ERS CEO, with Mike and Digi Schueler. Photo by Jenn Prine ©2015.

# Meet the Board

The Episcopal Retirement Services (ERS) Board of Directors makes it a priority to serve the ERS mission: enriching the lives of older adults in a person-centered, innovative and spiritually based way.

"I am a true believer of ERS's mission," says Robin Smith, Chair of the Board and former Procter & Gamble IT professional. "I am giving my time and talents to spread that mission to as many older adults in our communities as possible."

In each issue of Linkage, you'll meet the dynamic and passionate volunteer Board members who help drive ERS.

By Whitney Harrod Morris | Photographs by Gary Kessler



## Wilson Breiel

*Alternate Delegate Representing Deupree House*

**Other ERS involvement:** Chair of Deupree House Budget Advisory and Review Committee

**Former occupation:** I'm retired from a 40-year career with Armco Steel Corp., where I became president of Armco's Construction Products Division.

**Areas of expertise:** Sales and executive management

**Something people might not know about you:** Beginning with my parents' example and continuing with the encouragement of my employer, I've always been an active volunteer with various organizations in every community where I've lived. It's a truism that successful communities reflect an active and competent role of volunteers.

**How long have you been with ERS?** I'm in my first year.

**Why do you volunteer on the Board?** I spent most of my life about 35 miles north of Cincinnati in Middletown. My wife and I moved to Deupree House in 2010, and my wife passed away in early 2015. Deupree has more than exceeded our expectations, and I hope I can give back to some extent.



## JoAnn Hagopian

*ERS Board Member*

**Former occupation:** I recently retired from P&G after more than 41 years of service. I spent the early part of my career in manufacturing management and the last part in various HR assignments.

**Areas of expertise:** Training, policy development, leadership development and coaching, team effectiveness and problem-solving.

**Something people might not know about you:** I love entertaining friends and family, as well as entertaining to benefit nonprofits.

**How long have you been on the Board?** I'm just beginning my time with ERS.

**Why do you volunteer on the Board?** I'm attracted to ERS because of its mission to provide affordable housing for seniors. I'm also impressed that so many people on the Board come and stay for a long time, and even return after serving previously.

**Most rewarding part:** Making a difference in the lives of seniors, which fills a real need in the community.



## Gregory Hopkins

*ERS Board Member*

**Board committees he serves on:** Leadership Committee and the Health Transformation Committee

**Occupation:** Executive Director of Community Health Centers of Greater Dayton

**Area of expertise:** Over 25 years of healthcare operations experience. I have spent the last 17 years in healthcare management positions, working in a large hospital system and small/mid-size nonprofit healthcare organizations.

**Something people might not know about you:** I enjoy spending time on the golf course.

**How long have you been with ERS?** I just joined the Board in January.

**Why do you volunteer on the Board?** I'm impressed with the Board's leadership, including its longevity, commitment and passion. It's nice to see that ERS has been voted one of the best places to work for the past six years. Most importantly, I believe in the mission.



# ERS Makes A Difference To So Many

**E**piscopal Retirement Services is present in the lives of older adults through the services we offer in the wider community. We make an impact on the wellbeing of thousands of individuals and families through Deupree Meals On Wheels, Parish Health Ministry, Affordable Senior Living by ERS and Living Well Senior Solutions.

Four members of the ERS ministry teams and services explain the importance of these programs—and why they love what they do.

*By Kathy Doane / Photographs by Ronny Salerno & Gary Kessler*



**Anthony Williams**

*Director of Resident & Health Services for Affordable Living*

As Director of Resident and Health Services for Affordable Living, **Anthony Williams** and his health and wellness teams serve 1,500 folks in ERS Affordable Living communities.

*In what ways that aren't obvious have you seen clients' lives transformed once they are living in an ERS community?* When a resident moves into one of our communities, everyone on our team takes the time to get to know those we serve on a personal level.

It guides all that we do, and it really shows.

*Name a key service you provide to all of your clients.* The teams in our communities promote and

build awareness of health and wellness based on six dimensions of wellness: physical, social, emotional, intellectual, vocational and spiritual.

*How are the affordable living options that ERS provides likely to change in coming years?* I anticipate seeing additional health-based supportive services. We want to help those in our communities stay on top of health conditions that they may be confronted with, so they don't end up in more costly and less enjoyable settings such as hospitals or nursing homes.

*What is your biggest motivation for doing the work that you do?* Seeing those we serve continue to thrive as they age in place in our communities. When you know what you do is having a strong impact on so many lives, it's easy to come to work each day.



Peggy Slade-Sowders oversees Living Well Senior Solutions, a program that assists people in getting help to care for aging family members.

**How do you know when you or an older family member needs help?** Often there is crisis, illness or injury that prompts the call for help or when adult children are exhausted and overwhelmed from providing care/oversight for an aging parent.

## Peggy Slade-Sowders

Director of  
Living Well  
Senior Solutions

**Are there less apparent things to consider when contemplating an outside caregiver?** Acknowledge that not everyone is a good fit and that it may take some time to find the outside caregiver that is a good match. Also, remember that an outside caregiver still needs supervision and oversight.

**What are results that show you've improved lives?** Family members are less stressed, and aging parents know that they have a knowledgeable person to help with the small issues as well as the major problems.

**Helping people reclaim their lives must be very satisfying. Is there one example that stands out?** We had a gentleman who was having medical and memory issues. He had been very active and wanted to remain so—he just couldn't do it on his own. By providing assistance with his medications and having a caregiver there daily, he was able to take his dog to the park, visit friends in Louisville and travel to Europe twice with his caregiver.



Sue Susskind serves as coordinator of Deupree Meals On Wheels, a program that delivers meals to 320 clients.

**How does the program accommodate different tastes?** We used to deliver the same meal to all clients. We now offer a choice of hot meals. They are able to pick their frozen meals as well.

## Sue Susskind

Coordinator of  
Deupree Meals  
On Wheels

**Are there menu items that clients look forward to getting in their deliveries?** Meat loaf and Salisbury steak. We also serve a couple of breakfast entrees that they love.

**Is there a person you serve who is especially close to your heart?** A client who was not eating had lost over 20 pounds. I developed a phone relationship with her, and she calls every Thursday. She now is eating well, and her weight is back to where it should be. After 2½ years, we finally met. To hear someone tell you how she can stay in her home because of you—there is nothing better.

**What motivates you to serve?** When I see our clients' faces, get their thank you notes and receive their calls telling me that they don't know what they would do without us. Sometimes we are the only face they see in a day or a week, so I know we are bringing so much more than a meal.



## Jeanne Palcic

Director of  
Parish Health  
Ministry

Jeanne Palcic directs the Parish Health Ministry that provides outreach to 77 churches in Greater Cincinnati, Dayton, Columbus, eastern Ohio and Northern Kentucky.

**How do you assist churches in improving the health of their congregations?** We help them and other organizations start or enhance a Faith Community Nurse/Health Ministry that is about health promotion, disease prevention, responding to crisis and emphasizing a holistic approach to healthcare.

**How do you measure the impact of your work?** Our partners send us a quarterly report of their activities. In 2015, we had 675 volunteers who served approximately 9,000 people through taking blood pressures, personal health counseling, referrals to healthcare professionals and community agencies, home, hospital and nursing home visitation, health education and much more.

**If you had to name the one thing that people whom you serve need the most that many aren't getting in their daily lives, what would that be?** People seem to be starving to feel loved, wanted and cared for. That is what this ministry is all about.

**Helping people is a two-sided experience. What does your work do for you?** I love empowering others to share their gifts and talents and touch so many lives in such a meaningful way. I get so much more than I give through this work. ■

# Dear Friends,

2015 has been a year of exciting changes and challenges for Episcopal Retirement Services (ERS)—beginning with our new name! To be more reflective of the full scope of mission-driven services, which we provide within all of our residential communities as well as throughout the broader community, this new parent organization has been created to oversee Episcopal Retirement Homes, Inc.; ERS Affordable Living, LLC; ERS Development, LLC; and the ERS Foundation. By 2030, the number of 65-year-olds will double. We are working diligently to position ourselves to best serve these individuals at a time of tremendous change in the healthcare environment.

Key highlights and plans for the future include:

- Doubling our size in the next 5–8 years;
- Investing \$24 million in the Marjorie P. Lee Master Plan renovation;
- Cofounding the Post-Acute Care Network, a group of 10 providers that use a single transitional care system to seamlessly provide consistent high-quality care;
- Expanding Affordable Living for lower-income seniors throughout the Tri-State to 25 communities, which we own, manage or have in development, with a plan to grow at a rate of three additional communities per year;
- Expanding our Deupree Meals On Wheels zones into Loveland, Montgomery, Symmes, Maineville and Blue Ash areas, projecting delivery of an additional 2,000 meals per month.

After 34 years with ERS, I am entering my final year as CEO of this great organization whose commitment to person-centered care remains paramount in all we do. We strive to extend this approach each and every day to our residents, their families and friends, the thousands of individuals participating in our outreach programs, and to the many volunteers, donors, partners and staff who join us in our commitment to improving the lives of seniors. This ministry report is a snapshot of the many ways that ERS has made an impact throughout our community as part of our collective commitment to fulfill our mission. Thank you for your interest, support and compassion for helping others.

Sincerely,



R. Douglas Spitzer  
President and CEO

## ERS Ministry Reaches Across the Tri-State

Cincinnati's Episcopal Retirement Services works to improve the lives of older adults through quality senior living communities & community-based services.



14,185

Individuals impacted by community outreach programs

2,517

Individuals served as residents or through on-going support

# 2015 Overview and Financial Report

## Balance Sheet

*For the years ending December 31, 2015 and 2014*

Assets	2015	2014
Current Assets	\$13,422,308	\$17,923,039
Marketable Investments	\$32,930,545	\$31,830,850
Fixed Assets	\$104,273,200	\$92,124,646
MPL Endowment	\$26,055,765	\$21,420,580
Intangible Assets	-	-
Other Assets	\$12,028,502	\$16,854,230
<b>Total Assets</b>	<b>\$188,710,320</b>	<b>\$180,153,345</b>

Liabilities	2015	2014
Current Liabilities	\$11,070,605	\$8,495,306
Unamortized Entrance Fees	\$18,734,039	\$18,052,600
Long-Term Debt	\$56,040,099	\$43,038,328
Other Liabilities	\$9,785,528	\$7,421,436
<b>Total Liabilities</b>	<b>\$95,630,271</b>	<b>\$77,007,670</b>

Net Assets	2015	2014
Permanently Restricted	\$23,716,040	\$23,881,481
Temporarily Restricted	\$770,124	\$601,473
Unrestricted	\$68,593,885	\$78,662,721
<b>Total Net Assets</b>	<b>\$ 93,080,049</b>	<b>\$103,145,675</b>

<b>Total Liabilities &amp; Net Assets</b>	<b>\$ 188,710,320</b>	<b>\$ 180,153,345</b>
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**Total Individuals Served / Contacts Made**

**9,430**  
*Parish Health Ministry\**

**1,145**  
*Affordable Living*

**57**  
*Assisted Living*

**241**  
*Independent Living*

**399**  
*Nursing Care*

**36**  
*Living Well Senior Solutions*

**350**  
*Deupree Meals On Wheels*

**11,658**  
*Total Individuals Served*

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

## Condensed Statement of Revenue and Expenses For years ending December 31, 2014 and 2015

	2015	2014
Operating Revenue	\$36,398,621	\$33,090,458
Operating Expense	(\$40,662,481)	(\$36,942,427)
Net from Operations	(\$4,263,860)	(\$3,851,969)

	2015	2014
Non-Operating Revenue (Expense)	(\$4,940,979)	\$4,289,756
Total Net Income	(\$9,204,839)	\$437,787

### 2015 Contributions and Commitments

**\$561,983**

*Good Samaritan Mission Annual gifts*

**\$744,960**

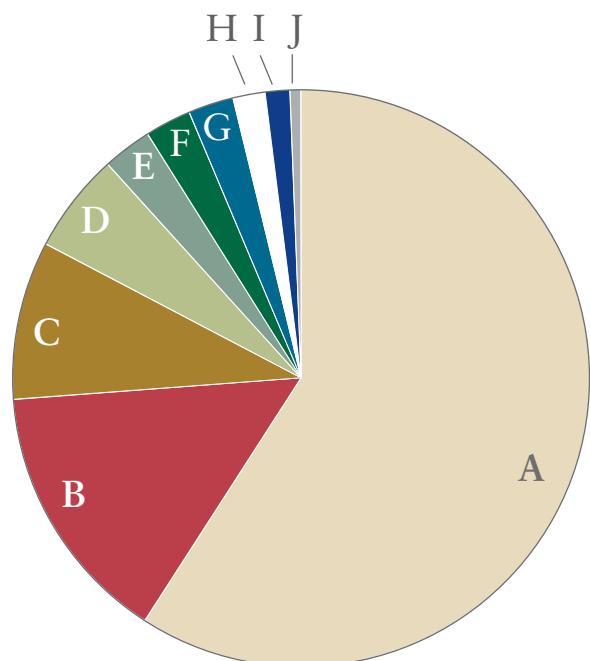
*Realized and Newly Committed Planned Gifts*

### 2015 Ministry Costs

For the year ending December 31, 2015

Ministry Item	2015
A - Residential Financial Aid	\$1,000,000
B - Affordable Living	\$248,826
C - Parish Health Ministry	\$150,153
D - Spiritual Care	\$94,774
E - Meals On Wheels	\$46,728
F - The Staff Assistance Fund	\$44,006
G - Community Outreach	\$43,000
H - Volunteer Coordinators	\$30,497
I - SAIDO Tuition Assistance	\$23,360
J - Partners In Care Fund	\$10,367
<b>Total Ministry Costs</b>	<b>\$1,691,711</b>

### 2015 Ministry Costs



This condensed financial information was extracted from the 2016 Episcopal Retirement Services, Inc. financial statement, a copy of which is available in the president's office.

# 2015 Ministry Report

As a mission-centered, not-for-profit organization, ERS goes 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.



*Specially trained staff work with residents as “supporters” for SAIDO memory support therapy program.*

## FINANCIAL ASSISTANCE

### *Helping needy residents, clients and staff*

*The mission and ministry of ERS actively support the elders in our care and the staff members who serve them. Direct financial support is offered to meet a wide range of financial needs.*

ERS residents are *Living well into the future*®, which means that they enjoy healthier, safer, and more enjoyable and purposeful lives than they would otherwise. Statistically, our residents' longevity exceeds the national average. For some, this means possibly depleting financial resources during their lifetime through no fault of their own. When moving into the Marjorie P. Lee or Deupree House, there is peace of mind of knowing that a resident will never be asked to leave due to an inability to pay thanks to our residential assistance fund.

Tuition assistance is also available for our residents who qualify for SAIDO Learning, a nonpharmaceutical intervention that has been proven to improve

or slow memory loss among adults with cognitive impairment.

## PARTNERS IN CARE FUND

The fund is available to all ERS residents and clients and can be used to purchase items and services not covered by government programs or insurance. Items commonly purchased through this fund in 2015 included eyeglasses, hearing aids, dentures, medication, food and home goods.

**65** Staff volunteered **2,500** hours through SAIDO, Extended Family and Meals On Wheels

**100+** Leadership volunteers devoted **1,739** hours of service to ensure our long-term success

**\$917,000** Calculated costs if volunteers were paid staff providing valued services

**40,000** Total hours volunteered among ERS communities and outreach programs

**\$43,000** Amount of ERS funding support of organizations also serving critical needs in our community

## COMMUNITY EDUCATION AND OUTREACH

### *Living with Purpose, Hope and Healing*



Featured speaker Dr. William Hablitzel with Doug Spitler, ERS CEO, and Jeanne Palcic, PHM Director

Attendees at the Annual Event ..... 467

The 2015 Refresh Your Soul conference, *Living with Purpose, Hope and Healing*, was presented in February by Parish Health Ministry (PHM) with support from the title sponsor: the Episcopal Diocese of Southwest Ohio.



Mitch Albom

The annual event raised funds for PHM programs and featured Mitch Albom, best-selling author of *Tuesdays with Morrie*, the magical book chronicling his time spent with mentor and friend Morrie Schwartz, during Morrie's battle with ALS. At the same time, Mitch struggled to find meaning and purpose in his own life. In addition, Dr. William Hablitzel poignantly illustrated how all people, not just medical professionals, can bring healing into their lives and work. National speaker Brooke Billingsley shared what the power of hope can do to help others in the midst of a healing journey, a message she developed while facing her own battle with breast cancer. The 2016 conference will be held on March 4.

### *Bridging generations to eradicate ageism*

The Council for Lifelong Engagement (CLLE) is mutually beneficial for seniors as well as students. CLLE is an award-winning program conceptualized and launched by ERS with the goal of eradicating ageism through meaningful intergenerational connections.

CLLE provides opportunities for older adults to share their vast knowledge, experiences and talents with young people. The 2015 presentation topics included Science and Engineering, the Stock Market, History of the 60s, the Great Depression, Photography, Watercolor Painting and Etiquette.

CLLE creates positive interactions between students and elders, highlighting the elders' knowledge and talents and furthering the education of young people.

Student Participants .....	450
Elder Participants.....	32

## AFFORDABLE SENIOR LIVING BY ERS

3 New ERS communities planned per year for lower-income seniors.

725 Bus trips per year help residents stay connected to the broader community.

1,145 Individuals served as Affordable Living residents

To keep pace with growth, \$400 per resident is projected annually to support ministry services

### *Revitalizing plants and community*

*Every senior deserves a place to feel at home in their retirement years, no matter what their financial situation. We offer rent-subsidized affordable senior living communities that provide a variety of amenities, options and services not often found in communities for seniors with limited incomes.*

When Wilmington campus resident Mr. Dwight M. arrived at this new home, he was "tired and worn out." He had moved back to Ohio from Florida where he'd lost his landscaping business in the recession and had other personal setbacks as a result.



*Community Manager Dee Colyer, resident Mr. Dwight M. and Social Services Coordinator Robyn Allen*

He was ready for his life to change, but he had no idea that as he was restored, he would improve his community and impact the lives of other residents.

It started as a simple suggestion that he get involved with the community greenhouse. It was in a state of disrepair, “a place plants went to die,” he joked. Mr. Dwight saw the potential and went to work giving the room a makeover. Without many resources, except what he could salvage from around the property, the place began to take shape.

A collection was taken up for a pump, and he was able to add a koi pond. Now, the once neglected area has been transformed into a vibrant sanctuary for peaceful respite. All are welcome with one rule—no gossiping in the greenhouse.

Easing transitions for new residents is a team effort of community managers, service coordinators, activities directors, and maintenance and housekeeping staff working together with existing residents to help newcomers feel welcome and involved. In time, it will become the place they call home. Some residents, like Mr. Dwight, are reserved when they first join the community. Mr. Dwight found his niche in the greenhouse, and now he is an important part of welcoming others into our community.

## DEUPREE MEALS ON WHEELS

**83,626** Meals delivered annually by **62** caring volunteers and staff

**100%** Department of Agriculture Audit Score

**100%** Council On Aging Audit Score

**100%** Board of Health Audit Score

*Volunteers make it more than a just a meal*

*Through Deupree Meals On Wheels, ERS provides older adults throughout Cincinnati with warm, nutritious meals delivered four days a week to their homes. More than 350 meals are delivered per day by compassionate and caring members of our team along with dedicated volunteers. We provide the crucial contact for the elders to supplement family support.*

Ms. Katie P. who has enjoyed Deupree Meals On Wheels for 10 years says, “Getting this meal helps me. I get that meal seven days a week, and I don’t know what I’d be eating without it.”

Katie also relies on the volunteers who visit every week. “I really don’t have anyone, and these volunteers are my family.” She adds, “I’m glad when these volunteers come; I’ve known Maria for 10 years, and

she's been with me through good and bad times. The meals and the friendships, that's what helps me stay on my own, and I want to live in my own place for as long as I can. My meal is cooked just for me. I know there is love in that meal."

Ms. Maddie L. is not able to cook, and she had lost a lot of weight. That's when she started getting Meals On Wheels. "I was weak and on chemotherapy, and those meals saved my life."

Like the care in our communities, our care for our Meals On Wheels clients is also person-centered. "Our program prides itself on catering to each individual's preferences and dietary needs. On a daily basis, we prepare personalized meals for many of our clients. A client may not be able to have a particular spice or can't eat leafy vegetables due to medication. They have a choice of receiving either hot or frozen meals, and our volunteers go above and beyond on each and every delivery to ensure the overall wellbeing of those we serve," says Sue Susskind, Deupree Meals On Wheels Coordinator.

## PARISH HEALTH MINISTRY

*"I love helping people live full and healthy lives."*

—Rev. Rhonda Johnson, BSN, RN

**675** Parish Health Ministry volunteers donated  
**17,646** hours in the community

**77** Churches and other partners are being supported through PHM

Nurses gave **7,141** hours to promote health and wellness in their churches

*Health of mind, body and spirit*

Parish Health Ministry provides support to thousands of people in the community through their partnership with 77 churches and Affordable Living communities through the work of 675 volunteers. They care for families and individuals from Central and Southern Ohio and Northern Kentucky.

Parish Health Ministry (PHM) extends the ERS mission and ministry into the surrounding community. In 2015 there were many successful pro-

grams in churches and in our Affordable Living Communities.

At St. Paul Village in Madisonville, PHM volunteer Reneé B. organized the 'Walk 50 Miles in 50 Days' program and had 26 residents sign up.

One of the residents, Ms. Eileen W., shared how thrilled she was to participate because it made a positive impact on her overall health and wellbeing. Ms. Eileen has diabetes and also needed a sleep aid at night.

"Three days after I started the walking program, I was able to sleep well with no help from pills. The more I walked, the better I slept, and believe me, it was a shock to me. Also, my blood pressure is lower, and I need less diabetic medication. I plan to walk my mile every day."

All of the residents enjoyed the program, and each one felt very motivated to continue walking after completing the 50 miles.

"I learned how to improve my health and my mental attitude," says one resident. "I am more healthy spiritually, and walking has made me more effective physically and has restored my energy and strength."

PHM Director, Jeanne Palcic, was excited to hear about these positive outcomes from St. Paul Village: "These results truly tell the story of Parish Health Ministry, where lives are being touched in such a meaningful way." ■



Parish Health Ministry volunteer Ms. Reneé B. and the residents at St. Paul Village organized a 'Walk 50 Miles in 50 Days' program in their community, and 26 residents participated.

# 2015 Community Partnerships

To fulfill our mission of improving lives for elders, ERS partners in many ways with foundations, corporations, churches and other organizations. Below is a listing of those who supported ERS philanthropically in 2015. To request a complete donor list in print, please contact the ERS Foundation office at (513) 979-2308.

## Foundation Partners

- Louis & Louise Nippert Charitable Foundation  
Ohio Capital Impact Corporation,  
The Key Bank Impact Fund  
The Carol Ann and Ralph V. Haile,  
Jr./U.S. Bank Foundation  
The H.B., E.W. and F.R. Luther  
Charitable Foundation, Fifth  
Third Bank and Narley L.  
Haley, Co-Trustees  
Kellogg Company 25-Year  
Employees Fund, Inc.  
Ruth J. & Robert A. Conway  
Foundation, Inc.

## Organizational Partners

- Gifts of \$10,000 and above**  
Christ Church Cathedral,  
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Episcopal Diocese of Southern  
Ohio  
The Model Group, Inc.  
Ohio Capital Corporation for  
Housing  
PNC Bank  
The Schueler Group  
U.S. Bancorp Community Dev.  
Corp Tax Credit Investment

### Gifts of \$5,000–\$9,999

- Episcopal Church of the Redeemer,  
Cincinnati  
Home Care by Black Stone  
Lenox Wealth Management  
Ridge Stone Builders & Developers

### Gifts of \$2,500–\$4,999

- Frost Brown Todd, LLC  
Gallagher SKS  
Locey, Cecil & Associates  
Medpace  
Right at Home of Greater  
Cincinnati  
Riverhills Neuroscience

### Gifts of \$1,000–\$2,499

- Bahl & Gaynor Investment  
Counsel  
Baker & Hostetler, LLP  
Bob Maynard Contractor  
Cassady Schiller CPAs & Advisors  
*Cincinnati Enquirer*  
Collier Nursing Services, Inc.  
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St. Thomas Episcopal Church,  
Terrace Park  
U.S. Bank  
Venue Lifestyle & Event Guide,  
Inc.  
Ziegler Senior Living Finance

# Living Legacy Society

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

Anonymous (3)	Mr. Charles B. Hedrick	Ken and Pam Paley
Mrs. Carol Benton	Barbara and Theodore High	Joan Trittipo Perkins
Mrs. Ellen A. Berghamer	Mrs. Phyllis S. Hopple	Mrs. Betty W. Pippert
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Jill and Ken Burkman	Susan Kellogg	Sylvia Wicker Reid
Anna K. and George G. Carey IV	Mr. Jack M. Kirby	Mr. and Mrs. Paul J. Scheper
Mr. and Mrs. Donald Y. Carpenter	Lana and K. Jay Kittenbrink	Michael T. Schueler
Chet Cavaliere	Jane Kuntz	Elizabeth C.B. and Paul G. Sittenfeld
Mr. and Mrs. A. Burton Closson Jr.	Robert H. La Shelle	The Reverends Bruce Smith and Susan Warrener Smith
Diana L. Collins	Mr. and Mrs. Jeffrey S. Lamb	Doug and Kathy Spitler
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Maureen Gregory and Adam Duke	Mr. Dan Meyer	
Mrs. Elizabeth T. Hatcher	Cece and Tom Mooney	
Robert and Judith Heaton	Philip G. Osborn	

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*Members of the ERS Living Legacy Society have chosen to support the values and principles of the Episcopal Retirement Services with a gift in their estate plans. This support will provide for the needs of older adults in a dignified and compassionate way far into the future. Please, consider becoming a member of this caring group by contacting Diana Collins at (513) 979-2307 or by e-mail at dcollins@erhinc.com.*

## Donor Spotlight

# Jane Kuntz



Jane Kuntz has answered the call to service time and again. Though she enjoyed a career in Dayton as a features writer and as development director with the Dayton Opera and the Alpha School, her volunteer work has been a real passion in her life.

Jane began her volunteer work with ERS at Canterbury Court, our Affordable Living community in Dayton. Her success with the board at Canterbury Court, including fundraising and event planning, led Jane to accept a seat on the ERS corporate board nine years ago.

She has enjoyed her work on the Board and recently completed her service in 2015. “I do care so much

about ERS. I will miss my work with the Board, but I’ll stay involved on a Board committee,” Jane says. “My interest has always been in the Affordable Living communities. I’ll stay involved and be working to see our expansion into Columbus.”

Jane’s philosophy is to give her resources wisely to organizations where she is also sharing her time and talents. In addition to her support for the Good Samaritan Mission, she has made a legacy gift—a provision for ERS in her will. “I will give what I can—and I will give or I will get. I’m not shy about asking for support for the work I believe in.”

ERS is grateful to Jane for her dedication to our mission and to service. We are thankful for her commitment to giving through a legacy gift to ERS. —*Kristin Davenport*

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*For more information on charitable gifts, contact Diana Collins at (513) 979-2307, [dcollins@erhinc.com](mailto:dcollins@erhinc.com), or visit online at [EpiscopalRetirement.com](http://EpiscopalRetirement.com). All gifts are tax-deductible to the extent provided by law.*

As part of our transition from Episcopal Retirement Homes to Episcopal Retirement Services, the Fund Development Department has realigned with the ERS Foundation. This is more reflective of the philanthropic nature of ERS as a not-for-profit organization dedicated to providing person-centered programs, services and ministries to our residents and elders in need of support throughout the community. In line with this idea, all communications regarding charitable needs and opportunities for support will now occur through the ERS Foundation, which will be represented by the Fund Development Department.

# Views From Our Planned Giving Team

## *Charitable Remainder Trusts and Charitable Lead Trusts*



Planned Giving is a form of charitable contribution that enables the donor to have a strong impact on a charitable organization, while generating additional personal benefit from the gift. There are a number of planned giving instruments, each one bringing benefit to both the donor and the not-for-profit organization. Here is a brief overview of two examples—Charitable Remainder Trust and Charitable Lead Trust.

### ***Charitable Remainder Trust (CRT)***

The CRT is also known as a “Split Interest Trust,” due to the fact that the trust will serve to benefit both the *Individual Income Beneficiary*, as well as the named *Charitable Remainderman/men* (charity).

The donor creates a CRT to accept ownership of appreciated asset(s), which are in turn sold, and the proceeds reinvested in a new diversified portfolio. This is an irrevocable charitable gift that generated an immediate Charitable Income Tax Deduction for the donor. In addition, because the CRT is a tax-exempt entity, the donor is shielded from any capital gain tax liability on the sale of the assets.

A distribution percentage is also established during the planning phase. This percentage determines the amount of income that will be distributed over the tenure of the CRT. At the termination of the CRT (at the death of the beneficiary, or a predetermined term), the residuum of the trust corpus is distributed to the named charitable beneficiary, a qualified 501(c)(3) organization.

### ***Charitable Lead Trust (CLT)***

The CLT is also a “Split-Interest Trust” in that it is designed to benefit both a named income beneficiary, as well as the named charitable beneficiary; however, the distribution components are reversed. The charitable beneficiary receives distributions over a predetermined period of time, and at the termination of the trust, the named beneficiary will receive the residuum trust corpus. The planning purpose of the CLT is to establish an instrument that will provide a current income stream to the donor’s designated charitable organization(s), while retaining the trust corpus and any growth generated over the term of the trust for the named beneficiaries. This trust is useful in transitioning assets to loved ones in the most tax-advantageous manner. ■

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*This is the first in a series of articles contributed by a guest adviser that will highlight charitable giving options. Christopher L. Kelly is a vice president of institutional asset management and a planned giving product specialist for PNC Bank.*

# ERS

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For more information contact Maureen at  
[mgregory@erslife.org](mailto:mgregory@erslife.org) or 513.979.2302 or visit  
[episcopalretirement.com/wonderfullife](http://episcopalretirement.com/wonderfullife)

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