



Spring 2018

INSIDE: 2017 ANNUAL REPORT

# Linkage



## *Our Ways of Working*

Relationships Are the  
Lifeblood of Our Culture

**ERS**

Episcopal Retirement Services

ENHANCED  
**TOP  
WORK  
PLACES**  
2017

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## ON THE COVER

*Leon Gulley and George Behymer talk with each other on a daily basis in the dining room at Marjorie P. Lee.*

## ERS Communities & Services

### Premier Retirement Communities

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

### Affordable Living Communities

*27 locations in Ohio, Kentucky, and Indiana. For more information on these communities visit [AffordableLivingbyERS.com](http://AffordableLivingbyERS.com).*

### Community Services

*Deupree Meals On Wheels  
Living Well Senior Solutions  
Parish Health Ministry*



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### *We Welcome Your Comments*

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To better serve you, Linkage magazine is available via e-mail and on the Episcopal Retirement Services website at [EpiscopalRetirement.com](http://EpiscopalRetirement.com). If you would like to be removed from the Linkage mailing list, please call (513) 271-9610.

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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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# Mentors Making a Difference

Professional mentorships at ECH are an invaluable experience for students. *By Kathleen Doane*



Mentor Cheryl Cubbage and Katie Luttrell

“She is such a natural when it comes to helping the residents and their families,” says Episcopal Church Home Social Worker Cheryl Cubbage, describing Katie Luttrell, one of ECH’s newest employees. The fact is, as Katie’s professional mentor during her internship at the Louisville care community, Cheryl had a front row seat to watch and work with Katie, then a graduate student

in gerontology at the University of Louisville.

The mentoring relationship that Cheryl and Katie shared is an example of Episcopal Retirement Services’ longstanding commitment to partnering with several colleges and universities to develop future leaders in the elder care field. ERS’s own CEO, Laura Lamb, who began working at an ERS community as a student, is an example of that success.

The work ethic and environment that ERS communities foster create the perfect setting for students studying to become nurses and social workers. They are able to learn from professionals committed to those values in an environment where new ideas are encouraged and opportunities to improve are an important part of the experience.

“My master’s required that I conduct a research project on a topic related to my internship,” Katie explains. After conducting staff interviews and talking with families, Katie decided she wanted to study how the physical surroundings affect an individual with dementia. Through her research, Katie found that a more home-like environment increased the overall well-being of individuals with dementia. Those findings lead her to suggest several changes to the common areas at ECH. Staff listened and acted, underscoring the following words from the ERS mission statement dealing with “Our Ways of Working”:

“We demonstrate relentless pursuit for improvement” and “We learn from others, both internally and externally.”

Last fall, when there was an opportunity to work there full-time as a social worker/admissions coordinator, Katie applied, interviewed, and got the job. Now Cheryl, the mentor, and Katie, the student, are colleagues.

“We still usually check in with each other during the day,” Cheryl says. “And she continues to come up with good ideas.” ■

# Our Ways of Working

This is the first story in a series that will illustrate our Core Values. “Relationships” is our first value and through our Ways of Working, we honor relationships in all that we do. *By Kristin Davenport*



Tarrah Pickard, staff member since 2006, and Mary West, resident since 2004.

**A**t ERS, we devote energy and resources to making our culture the lifeblood of our workplace. We often refer to our culture as the “secret sauce.” With our Core Values at the center of our culture, we do our best to apply them so they are much more than a framed piece of artwork. We have spent valuable time over the past 18 months defining our culture. Residents, staff, families, and board members rolled up their sleeves to consider, and ultimately, re-energize our Values and articulate our Ways of Working.

“Relationships are vital to our well-being,” says

Joan Wetzel, Vice President of Organizational Development & Human Resources. “We need strong, positive interaction with others and friendship just as much as we need air, water, and food. The better our relationships are at work, overall, the happier we will be.”

Our value of “Relationships” goes beyond our relationships with our teammates. “ERS expects us to engage in deep and meaningful relationships with our residents and clients. When we take the time to interact and really get to know our residents, frankly, we just perform our jobs better,” Joan says.

In building their relationship, Leon Gulley, Dining Services Supervisor at Marjorie P. Lee, and George Behymer, a resident, found they have a lot in common, and quite simply enjoy talking to each other. Leon discovered that both men had a military service background. “While getting to know George, I realized we were both in the Navy,” Leon says. “My relationship with George and other residents is what I love about coming to work here. It’s very special to make someone’s day by knowing their favorite dessert, or how they like their coffee,” he says.

“Developing and maintaining meaningful relationships with our residents makes my job easier and more enjoyable,” says James Fisk, director of wellness for ERS. “The more I know about our residents, the better I can anticipate their specific needs. When our residents take an interest in my life outside of work, it’s clear that they care about me beyond my role within ERS. That motivates me to consistently serve them in the best way possible.” Jim oversees programs such as exercise classes, tai chi, yoga, personal training, and pool activities. “We have a big focus on well-being here, helping our residents and staff to live to their fullest potential as they age,” he says.

We recognize that good relationships don’t happen overnight. They take time and emotional investment.

In 11 years working many different jobs at ERS, Tarrah Pickard has formed deep relationships with team members and residents. “ERS has been wonderful to me and for me,” she says. In only a few years, Tarrah went from serving tables to nursing services to administration, and now is director of life enrichment and activities for residents at Deupree House. In her role she works with a resident committee that organizes activities such as art exhibits, educational seminars, entertainment, and numerous outings in the community to restaurants and the theater. “I love coming into work every day, working with the residents and just listening to fascinating stories about their lives,” she says. “I learn something every day from our residents. They are like family to me.”

The leader of the activities committee, Mary West, a retired teacher, has served as a mentor for Tarrah. “Our friendship is based on mutual trust,” Tarrah says. “Mary has given me positive feedback



Nancianne Parrella, resident since 2010, and Jim Fisk, staff member since 2008.

and support and has never made me feel bad about my errors. She’s wonderful.”

Trust is the foundation of every good relationship. We build trusting relationships with our teammates and residents and we communicate better. We assume positive intent, look for the best in others, and have each other’s back. We are accountable to each other. We take ownership of our actions and our words. Most importantly, we are person-centered with one another, focusing on our strengths and committed to each other’s successes. ■

If you would like to receive a copy of our new Values and Ways of Working, please call the Support Services Office at 513-271-9610. Visit [episcopalretirement.com/values](http://episcopalretirement.com/values) to view or download a copy.

# Our Journey Towards a Positive Approach to Care

Even when it's complicated, person-centered care keeps us on track. *By Kristin Davenport*

**M**ost caregivers have attended dementia training. They understand the changes that the disease causes in a person's behavior over its progression. But many caregivers don't understand how to "live in relationship with a changing brain," as dementia care expert Teepa Snow describes it.

That's the benefit of A Positive Approach to Care® (PAC) training. It gives ERS staff the tools needed to meet residents where they are, knowing each day takes us a little further down the road.

PAC was developed by Teepa Snow, based on knowledge she has gleaned over a 40-year career as a Registered Occupational Therapist (OT).

Teepa's program teaches caregivers the hands-on

skills and interpersonal techniques they'll need to provide person-centered memory care.

At ERS, we apply a multi-faceted approach to PAC training. First, we train in groups and become familiar with the positive-approach techniques. Next, we work in small group "huddles" to role-play resident behaviors and the best approach in response. Then, as they provide care, team members get one-on-one support from a coach.

We are fortunate to have two PAC trainers: Emerson Stambaugh, Executive Director of Hospitality for ERS; and Tracie Martella, RN, Director of Nursing, Deupree House and Cottages. They plan opportunities for PAC instruction, even classes taught by Teepa herself.



Daneika Farmer, Emerson Stambaugh, Tracie Martella, and Stephanie Biros lead ERS training and coaching for A Positive Approach to Care.



At ERS staff training, Teepa Snow explains, “It takes an open mind, commitment, time, and practice to develop the skills to live well when in relationship with the changing brain.”

ERS also has two coaches: Daneika Farmer, Household Coordinator at Deupree Cottages; and Stephanie Biros, RN, BSN, Nursing Care Team Manager at Marjorie P. Lee. Coaches encourage teams to huddle often. They are also available for support and to encourage the positive response. More than 200 ERS team members have been trained and are practicing PAC.

### What A Positive Approach to Care® Looks Like In Practice

The Hand Under Hand (HUH) technique, which staff learns as part of PAC training, has made a big impact on ERS staff and residents. A resident who needs direction when walking from place to place accepts direction when a caregiver uses the HUH technique.

How does it work? A caregiver makes and maintains eye contact, puts one hand under the resident’s hand and another on her back to guide her toward their destination.

Before learning the HUH technique, staff prompted the resident with cues like “no, come this way,” or “turn around,” when trying to guide her to a seated position.

After learning HUH, the staff and resident had more positive conversations with smiles and laughter.

All it took was establishing good eye contact and the positive-approach hand-positioning.

Journeying through dementia and other cognitive disorders, it can be hard to understand what a person is trying to communicate.

Often there are confounding stressors that cause negative behaviors. PAC guides caregivers to a more empathetic response and encourages careful observation and a calm, individualized response.

That’s the essence of person-centered care. As caregivers we modify our behaviors to do what the person with dementia needs. Using this approach we provide effective aid and achieve better outcomes. ■

#### Living Well Memory Support Suite of Therapies

- SAIDO Learning
- IN2L (It’s Never 2 Late)
- Inspiring Minds Through Art
- Positive Approach to Care
- Music & Memory
- 360 Wellbeing
- Java Music
- Grey Matters

For details, visit [episcopalretirement.com/LWMS](http://episcopalretirement.com/LWMS)

# Dear Friends,

2017 has been a stellar year in the life of Episcopal Retirement Services (ERS). The annual report on the following pages will give you the highlights of 2017, which has turned out to be our best year financially in the history of ERS.

This rock-solid position will not be a place for us to rest on our laurels as an organization. We plan instead for it to be a launch pad for ERS to lead future innovation in aging-care services.

For the older adults that we serve and their families, we've been making a positive difference in their lives for more than 67 years. With our eyes on 2025 and beyond, we commit to you, and to those we serve, that we will address the community's needs and advocate for the highest level of aging services and quality of life for older adults in Ohio, Kentucky, and Indiana.

Here are important updates for this year, as well as a look at significant milestones ahead in 2018 and beyond:

- Leadership transitions are continuing at ERS. Our talented board chair Robin Smith has retired and we welcomed JoAnn Hagopian as new board chair beginning in February. Their willingness to serve is a blessing for ERS.
- It is with equal amounts of joy and sadness that we will celebrate with our longtime CFO Paul Scheper as he retires in June. Paul has dedicated more than 35 years of service to ERS. We are thankful for his faithful leadership and exceptional legacy of steady excellence.
- Marjorie P. Lee Master Plan Progress: This summer we look forward to opening the Shaw building, featuring the beautifully renovated Tom Craig Lobby and our state-of-the-art Meyer Family Rehabilitation Center and short-term rehab studios.
- Marjorie P. Lee Capital Campaign: We look forward to celebrating the completion of our \$4.25 million capital campaign to assist in funding the \$20 million master plan renovation. The generous support of hundreds of donors has made this possible.
- New Ventures: Our senior leadership and board have developed a strategy to stay ahead of an increasing demand on funds to provide services to our affordable living seniors. A team of "ideation" experts has begun to develop a for-profit enterprise solution to fund these crucial services. This year we will evaluate several business models. This is an exciting time for ERS as we solve this funding struggle through innovation and new ventures.
- Dementia-Inclusive Cincinnati: Regional community partners have joined us to launch the initiative, starting with the Kennedy Heights neighborhood. We are working diligently to expand our efforts to support the caregivers of those living with Alzheimer's or dementia with the goal of making Cincinnati the most dementia-inclusive city in the country.

With the success of 2017, we are confident that 2018 will position our organization for future growth. Thank you for your continued support and commitment to travel on this journey with us.



Sincerely,

A handwritten signature in blue ink that reads "Laura R. P. Lamb". The signature is fluid and matches the printed name below it.

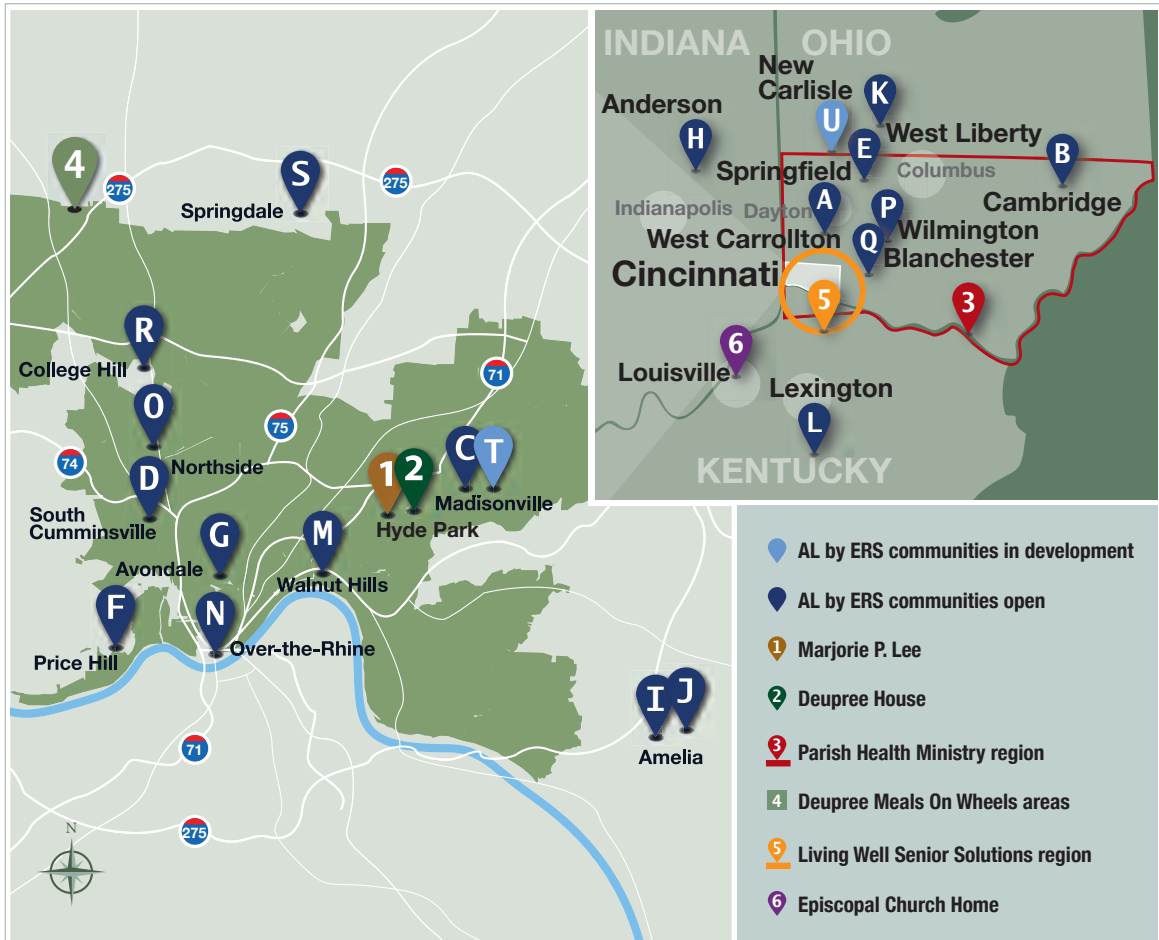
**Laura R. P. Lamb,**  
President & CEO



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.

**13,417**

Individuals served through ongoing support or impacted by community outreach programs.



**The Affordable Living by ERS communities**

- |                                  |  |  |
|----------------------------------|--|--|
| <b>A</b> Canterbury Court        | <b>H</b> Parkview Place                | <b>P</b> Oaks Village (4)<br>Prairie View, Friendly Center,<br>Quaker & Mulberry Place |
| <b>B</b> Cambridge Heights       | <b>I</b> Thomaston Woods               | <b>Q</b> Blanchester Campus (2)<br>Blanchester Friends                                 |
| <b>C</b> St. Paul Village I & II | <b>J</b> Thomaston Meadows             | <b>R</b> Marlowe Court   |
| <b>D</b> St. Pius Place          | <b>K</b> Green Hills Affordable Living | <b>S</b> Maple Knoll Meadows   |
| <b>E</b> Shawnee Place           | <b>L</b> Trent Village                 | <b>T</b> Madison Villa   |
| <b>F</b> The Elberon             | <b>M</b> Walnut Court                  | <b>U</b> New Carlisle Campus   |
| <b>G</b> Forest Square           | <b>N</b> Central Parkway Place         |  |
|                                  | <b>O</b> Knowlton Place                |  |

# 2017 Overview and Financial Report

## Balance Sheet

For the years ending December 31, 2017 and 2016

Assets	2017	2016
Current Assets	\$22,364,269	\$17,220,187
Marketable Investments	\$39,340,302	\$34,453,725
Fixed Assets	\$197,333,082	\$201,590,963
Beneficial Intents in Endowments	\$32,238,549	\$28,221,554
Other Assets	\$6,670,351	\$9,877,521
<b>Total Assets</b>	<b>\$297,946,553</b>	<b>\$291,363,950</b>

Liabilities	2017	2016
Current Liabilities	\$16,367,786	\$14,158,172
Unamortized Entrance Fees	\$30,893,386	\$30,823,595
Long-Term Debt	\$80,952,117	\$79,250,646
Other Liabilities	\$1,918,268	\$4,896,410
<b>Total Liabilities</b>	<b>\$130,131,557</b>	<b>\$129,128,823</b>

Net Assets	2017	2016
Permanently Restricted	\$29,000,621	\$25,886,473
Temporarily Restricted	\$7,119,679	\$6,848,808
Unrestricted	\$131,694,696	\$129,499,846
<b>Total Net Assets</b>	<b>\$167,814,996</b>	<b>\$162,235,127</b>
<b>Total Liabilities &amp; Net Assets</b>	<b>\$297,946,553</b>	<b>\$291,363,950</b>

## Condensed Statement of Revenue and Expenses

For years ending December 31, 2016 and 2017

	2017	2016
Operating Revenue	\$62,965,164	\$53,558,005
Operating Expense	(\$70,155,349)	(\$58,749,820)
<b>Net from Operations</b>	<b>(\$7,190,185)</b>	<b>(\$5,191,815)</b>

	2017	2016
Non-Operating Revenue (Expense)	\$9,107,190	\$1,372,311
<b>Total Net Income</b>	<b>\$1,917,005</b>	<b>(\$3,819,504)</b>

## 2017 Contributions and Commitments

**\$910,469**

*Good Samaritan Mission Annual Gifts*

**\$3,927,739\***

*Marjorie P. Lee Capital Campaign Gifts and Commitments*

**\$469,728\*\***

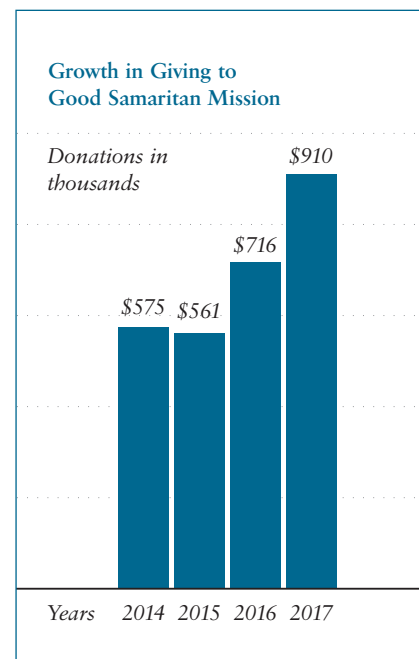
*Realized Planned Gifts in 2017\*\**

**\$650,000**

*Newly Committed Planned Gifts (some gifts are also included in the MPL Campaign commitments)*

\*Cumulative MPL Campaign total as of 12/31/17.

\*\*Total does not include an additional \$229,399 of realized planned gifts that were directed to the MPL Capital Campaign



The Good Samaritan Mission Fund

**\$1,620,000**

*Residential Financial Aid*

**\$586,083**

*Affordable Living by ERS*

**\$205,371**

*Parish Health Ministry*

**\$291,132**

*Spiritual Care*

**\$49,260**

*Community Outreach programs*

**\$54,225**

*Deupree Meals On Wheels*

**\$32,564**

*SAIDO Tuition Assistance*

**\$21,562**

*Volunteer Coordinators*

**\$36,556**

*The Staff Assistance Fund*

**\$13,149**

*Partners In Care Fund*

**\$2,900,000**

*Total ministry costs*

**6.8%**

*of ERS annual budget*

Ministry through community outreach programs

**9,049**

*Individuals impacted by community outreach programs*

**7,839**

*Parish Health Ministry Contacts Student Educational Experiences*

**286**

*Parish Health Ministry Training Attendees*

**539**

*Refresh Your Soul Attendees*

**325**

*Community Education Event Participants*

**60**

*Students Attending Council on Lifelong Engagement Presentations*

Ministry for residents or through on-going support

**1,978**

*Affordable Living Residents*

**358**

*Independent Living Residents*

**164**

*Assisted Living Residents*

**1,109**

*Skilled Nursing Care Residents*

**400**

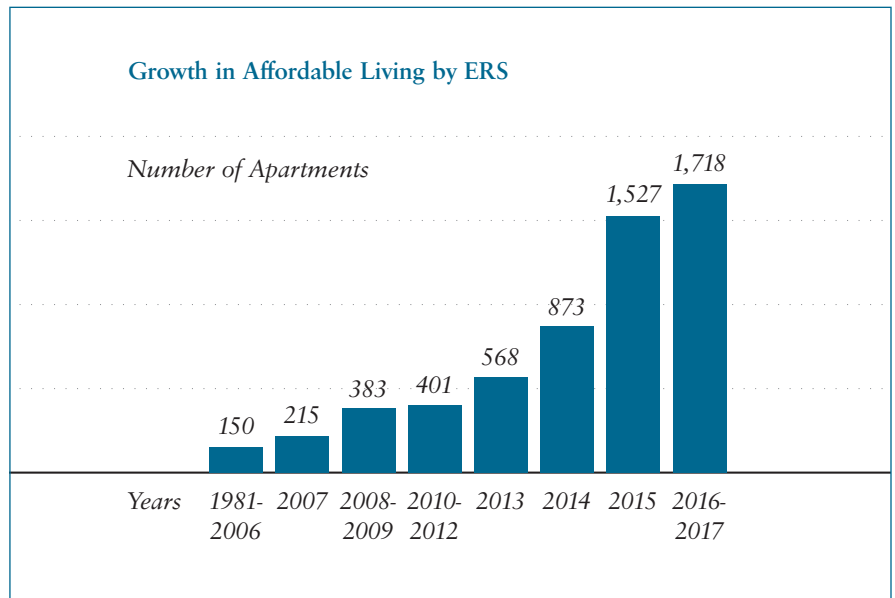
*Meals On Wheels Clients*

**34**

*Living Well Senior Solutions Clients*

**325**

*Student Educational Experiences*



# Parish Health Ministry Celebrates 20 Years

Monthly blood pressure screenings, which now total more than 80,000, are saving the lives of parishioners around the region.

By Kathleen Doane

Greg Winter knew something wasn't right. He was constantly tired, even after a full night's sleep. At his doctor's suggestion, he'd been monitoring his blood pressure and noticed, in recent months, that it had been creeping up. Still, he wasn't having chest pains, so he didn't think anything too serious was going on. Then, one Sunday after Mass at Sacred Heart Church in Fairfield, he had Parish Nurse Gail Grabowski take his blood pressure during one of the regular BP screenings offered at the church through a partnership with Episcopal Retirement Services' Parish Health Ministry (PHM).

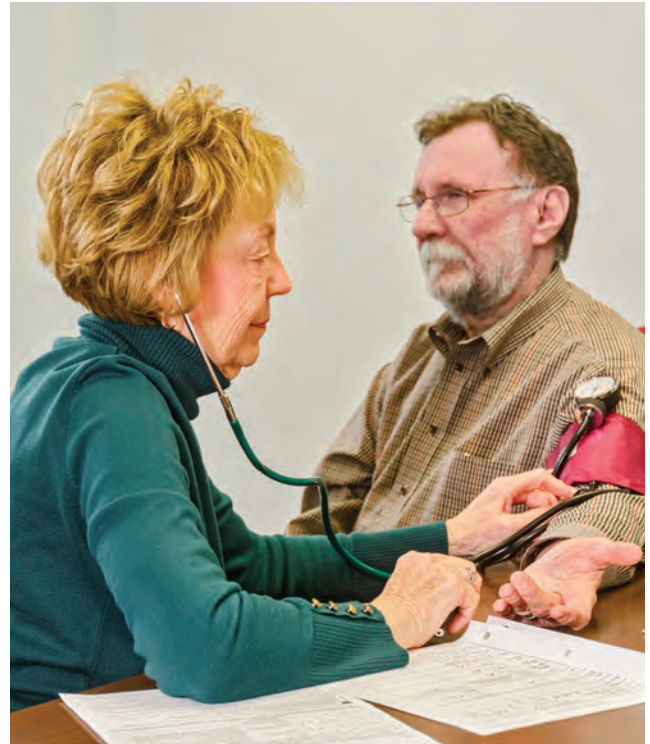
"It was high, and she recommended I see my family doctor," Greg recalls.

He took her advice and within a week, Greg's doctor scheduled a chest X-ray, EKG, and stress test. "I was all hooked up and ready to go, then they wouldn't let me on the treadmill," Greg says. He was told that there was a problem, and he needed to see a cardiologist as soon as possible.

Less than two weeks later, Greg received a stent to repair a 99-percent blockage in one of his arteries. "Two days later, I was home and felt great," he says. Greg believes that having Gail, a professional, urge him to see his physician after confirming his high blood pressure reading at church possibly saved his life.

This year is the 20th anniversary of PHM, and they have a lot to celebrate. In addition to providing a wide range of health and wellness activities and services to 170 tri-state congregations and communities since its inception in 1998, PHM Director Jeanne Palcic estimates that more than 80,000 blood pressures have been taken, 10,000 of which have resulted in physician referrals.

Fifteen to 20 parishioners usually stay after Mass



Gail Grabowski checks Greg Winter's blood pressure regularly as a parish nurse for Sacred Heart Church.

to take advantage of the monthly blood pressure screenings at Sacred Heart, according to Gail. "It seems every month we get one or two who are new," she says. "We have caught numerous high blood pressures where it was a surprise to the person."

Several months after his surgery, Greg made a point of seeing Gail to thank her and share his new mission: "I tell everybody I run into to get their blood pressure checked, and if it's high, to go see a doctor."

"It definitely was very rewarding for us to hear that," Gail says. More proof that PHM's efforts are having a positive ripple effect. ■

# Way to Bee Healthy

Bee Healthy has helped residents at Affordable Living by ERS senior apartment communities significantly improve their overall health.



Residents at Canterbury Court are ready to “Bee Healthy!” The award-winning wellness program helps residents like Lucy and Marilyn focus on individual goals for well-being.

**T**he Bee Healthy Wellness Program is a collaborative initiative between ERS, Xavier University, and Home Care by Blackstone which provides Affordable Living residents with blood pressure clinics, coordinated care transitions, and a variety of wellness opportunities including group exercise activities and monthly health talks.

The initiative started at St. Paul Village in 2015, serving 168 Affordable Living residents. It expanded to serve an additional 95 residents across our Cincinnati communities with the goal of reaching a total of 632 residents. To date, approximately 55 percent of residents have voluntarily chosen to participate in the program at their communities.

This person-centered program focuses on the

strengths of each participant and encourages commitment to his or her successes. Residents can earn Bee Bucks for participating in the wellness activities, which they can spend to purchase items.

Volunteers are screened to identify if they are at risk for health deterioration. In addition, their knowledge, skill, and confidence for managing one’s own health and healthcare are assessed.

—Kristin Davenport

**3,966** AL by ERS on-site clinic visits were provided to residents, free of charge.

**3,118** bus trips last year helped connect residents to the broader community.

# Delivering Meals and Smiles

Every Tuesday through Friday, Deupree Meals On Wheels staff and volunteers prepare and deliver nutritious lunches to 400 area seniors.



Loveland resident Jean and her Meals On Wheels driver Joe Bischoff have become friends this year. Joe brings more than nutritious meals; he also brings friendly conversation.

**T**hrough Deupree Meals On Wheels, ERS provides older adults with something they need to age in place—warm meals delivered right to their homes. When those meals are delivered, more than 400 each day, elders also receive crucial contact that complements their family support.

Jean, a Meals On Wheels client, and Joe Bischoff, a dedicated volunteer driver, are neighbors in Loveland. They've gotten to know each other through weekly visits. "We talk about my family and his; it has been nice to get to know him, and I look forward to his visits," Jean says. "I'm here by myself which can be lonely."

ERS and its volunteers invest the time to listen to each client and accept that each senior has

unique wants and needs. "We cater to their preferences and dietary needs," says Sue Susskind, Deupree Meals On Wheels Supervisor. "We prepare personalized meals for many of our clients. They have a choice of receiving either hot or frozen meals, and our volunteers go above and beyond to ensure the overall well-being of those we serve."

—Kristin Davenport

Record-breaking **110,176** meals delivered annually by caring volunteers and staff

**100%** Department of Agriculture audit score

**100%** Council On Aging audit score

**100%** Board of Health audit score



ECH supports The Healing Place with monetary and clothing donations. Staff members and residents, including (standing) Sally Tan, Anne Vanderburgh, Chad Ballard, Jennifer Huber, Diana Atkins, (seated) Tracy Graham, and Elizabeth Riggs Pace, led the collection efforts.

## Help, Hope, and Healing

ECH staff members teamed up with residents and family members to collect donations and give aid to clients at The Healing Place.

**T**here's an epidemic of kindness at the Episcopal Church Home (ECH) in Louisville.

ECH staff members started a campaign to gather donations of socks and coats for the clients at The Healing Place, which provides food, shelter, clothing, and a substance abuse recovery program to 600 men and women each year.

The recovery program is free to any person who wants to get sober. The Healing Place mission inspired the ECH community to get involved. When the campaign launched at ECH, residents and family members jumped right in to help. Staff members and volunteers collected dozens of coats and more than 1,000 socks.

There is much more than an average day in the

life at a retirement community happening at ECH, which sees its ministry as an expression of God's love in the world for all people. Driven from the heart, the ECH community is dedicated to selfless service—not only to each other but to those in the broader community who need care and support.

—Kristin Davenport

Staff and volunteers collected dozens of coats and more than **1,000** socks.

**117** volunteers donated **3,550** hours of service at ECH.

# 2017 ERS Samaritan Circle

The Samaritan Circle is comprised of individuals who generously support ERS' annual ministries through the Good Samaritan Mission Fund with a donation of \$1,000 or more. We would like to thank the following donors for their leadership giving in 2017:



## Platinum Level: \$10,000

Anonymous	Jack Kirby	Earl Raible
Dr. and Mrs. Stephen Cross	Jack Martindell	Bob* and Connie Reed



## Gold Level: \$5,000–\$9,999

Anonymous	JoAnn* and Gary Hagopian	Geoff and Robin* Smith
Ann and Ben* Blemker	Bill* and Liz Knodel	Steve and Liz Sudberry
Alan and Tal Gast	Robbie Robertson	
Taylor* and Anne Greenwald	Paul^ and Mary Lee Scheper	

# 2017 ECH Donors

The Episcopal Church Home (ECH) recognizes the following partners for their generosity and leadership through their philanthropic investments of \$1,000 or more in 2017. The John P. Morton Society celebrates our founder and recognizes those who have remembered ECH in their estate plans.

Anonymous (2)	Mr. and Mrs. Donald F. Kohler	Ms. Bonnie G. Sabel	L&N Federal Credit Union
Mr. and Mrs. William O. Alden, Jr.	Mr. and Mrs. Peter B. Lanham	The Reverend and Mrs. Alfred R. Shands, III	Estate of William B. Grant, Jr.
Mr. Bruce D. Ballerstedt and Ms. Joann C. Franko	Arthur J. and Mary Lerman Foundation	Mr. and Mrs. Andrew Strausbaugh	John P. Morton Society:
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Dr. Jane E. Cornett	Mr. and Mrs. Kenneth W. Moore	Mrs. Juanita "Weezie" Walker	Dr. and Mrs. Keith R. Knapp
Mrs. Anne H. Dishman	Ms. Marie Murphy	Mrs. Katie Winkelhake	Mr. and Mrs. Stephen B. Ellis
Ms. Caroline Eddleman	Mr. Philip B. Newman, III	ECH Woman's Board	Dr. and Mrs. James Woodward
Mrs. Beverly Edwards	Dr. and Mrs. William S. Panning	Klein Family Foundation	Mrs. Ayako I. Phillips
Mr. George Edwards	Mr. and Mrs. Gordon L. Ragan	First Christian Church	Mr. James R. Hendon, Jr.
Mr. Tim Gebhart	Mr. Paul and Mrs. Hollis A. Real	William C. Almstedt Foundation	The Rev. Dr. Georgine Buckwalter
Ms. Mary L. Gorman	Mr. and Mrs. Gibbs Reese	J.J.B. Hilliard, W.L. Lyons, LLC	



# 2017 Samaritan Circle



## Silver Level: \$3,000–\$4,999

Dick* and Lee Adams	Jeff and Laura^ Lamb	Bill and Ruth Rhodenbaugh
Chet Cavaliere	Terry and Elizabeth Lilly	Miles and Linda Schmidt
Summers Hunter	Bobby and Rachel Maly	The Revs. Bruce* and Susan Smith
Mrs. Emily W. Johann	Jeff* and Jeanette March	Gates* and Kathy Smith



## Bronze Level: \$1,000–\$2,999

Anonymous (2)	Dr. James M. Garvey, Jr.	Robert and Josephine Linkins	David and Linda Stetson
Mr. and Mrs. Frank J. Andress	Elizabeth Goessel-Rule	Ron Lloyd	Bernie* and Kathy Suer
Ms. Stephanie Antoun^	Nancy and Jack Gottschalk	Jodi and Steve Mahon	Neal and Sally Sundermann
St. John and Gay Bain	Patricia Greulich	Nash McCauley	Margaret* and Tim Swallow
David and Joy^ Blang	Mrs. Elizabeth Lovett Grover	Bob and Gretchen McCormick	Ann Swanson
Joe and Anne Bodkin	Tim and Peggy Gruber	Brenda McEntyre^	Mary Tanke
Jon B.* and Jeanne M. Boss	Mrs. Mary Harrison	Cece Mooney	Frank^ and Ginny^ Uehlin
Eleanor Botts	Noel and Angela Horne	Mr. and Mrs. Alfred A. Moore	Grace Ulm
Megan^ and Dan Bradford Jim and Kathy Brockman	Kathy Ison-Lind^ and Bill Lind	Ernest and Marjorie Muntz	Anne Warrington Wilson
Ann Bullock	Mr. Harry Kangis and Dr. Julia Hawgood	Jack and Lois Nebergall	Mary West
Barry and Audrey Cors	Mr. and Mrs. Walter C. Kautz	Dick and Ellie Paulsen	Joan^ and Steve Wetzel
Bill and Polly Culp	Nancy and Bill Keating	Eli and Ilona Perencevich	Mr. and Mrs. William Wham
Sonia Daoud	Lana and K. Jay^ Kittenbrink	Jewel Porter	John and Francie Williams
Pierson Davis	Vivian B. Kline	Tom* and Sarah Regan	Anne Wilson
Angelo and Molly^ deJesus	Mr. and Mrs. Frederick Koehler	Ted Sarran	Doug and Ellen* Zemke
Mr. Thomas H. Dorger	Samantha Koeninger	Mr. and Mrs. John E. Schmidt	
Sandra and Thomas Eisele	Jack* and Nanci Koepke	Mike and Digi Schueler	
The Rev. and Mrs. Darren R. S. Elin*	Mike and Kathy Krug	Rich* and Madelyn Setterberg	
Ms. Lissy Fabe and Mr. Chris Taylor	Corky Ladd	Ms. Karen Sieber	
Mr. Walter S. Faight	John and Susie Lame	Ginnie Smith	
Walter and Mary Ann Feige	Chuck and Peggy Landes	Doug and Kathy Spitler	
Mr. Alessandro Ferraris		Emerson Stambaugh^ and Michael Abernathy	
Rick and Orene Foreman			

\*Denotes a current ERS Corporate, Affordable Living, or Foundation Board Member

^ Denotes a current ERS Staff Member

# 2017 Community Partnerships

## Foundations, Corporations, Churches, and Other Organizations

To fulfill our mission of improving lives for elders, it takes a community. ERS builds partnerships in many ways with foundations, corporations, churches, and other organizations. We would like to recognize the following partners for their tremendous commitment and support:

### Gifts of \$100,000 and above:

The Diocese of Southern Ohio  
Fifth Third Bank  
H.B., E.W. & F.R. Luther Charitable Foundation, Fifth Third Bank and Narley L. Haley, Co-Trustees  
Jacob G. Schmidlapp Trusts, Fifth Third Bank Trustee  
Ohio Capital Corporation for Housing  
The Ellen A. and Richard C. Berghamer Foundation

### Gifts of \$20,000–\$99,999:

Christ Church Cathedral, Cincinnati  
L. & L. Nippert Charitable Foundation  
Model Group, Inc.  
Ohio Capital Impact Corporation  
The Thomas J. Emery Memorial

### Gifts of \$10,000–\$19,999:

Arthur and Elizabeth Kuhn Fund  
Lutheran Benevolent Society  
Meals on Wheels America  
PNC Bank  
Ruth J. and Robert A. Conway Foundation, Inc.  
TriHealth

### Gifts of \$5,000–\$9,999:

BMO Harris Bank N.A.  
CareSource Foundation  
Church of the Redeemer  
Duke Energy Foundation  
Home Care Assistance of Southern Ohio  
Rindsfoo Foundation  
Medpace  
Millennium Business Systems

Molina Healthcare  
Ridge Stone Builders & Developers  
The Robert D. Stern Fund at the Greater Cincinnati Foundation, with thanks to Mrs. Robert D. Stern  
Wohlgemuth Herschede Foundation

### Gifts of \$2,500–\$4,999

Arthur J. Gallagher & Co.  
Bahl & Gaynor Investment Counsel  
Bruce S. and Caroline C. Taylor Fund  
Frost Brown Todd LLC  
Graydon  
KeyBank  
Lenox Wealth Management Charitable Fund at Schwab Charitable  
Merrill Lynch & Co., Inc  
Multi-Craft  
NextStep Networking, Inc.  
Planes Moving and Storage  
SFCs Inc.  
St. Thomas Episcopal Church  
The Cincinnati Woman's Club  
US Bank  
Ziegler Senior Living Finance

### Gifts of \$1,000–\$2,499:

Aegis Protective Services  
Applied Mechanical Systems, Inc.  
Ascension & Holy Trinity  
Assisting Hands Home Care  
ATA Beilharz Architects  
Christ Episcopal Church, Dayton  
Christ Episcopal Church, Springfield  
Christ Our Light Parish  
Clark, Schaefer, Hackett & Co.  
Collier Nursing Services Inc.

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Complete Building Maintenance  
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Fort Washington Investment Advisors  
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Industrial Roofing Services, Inc.  
Johnson Investment Counsel, Inc.  
Kathman Electric Co., Inc.  
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Permakil Pest Control, Inc.  
Pinnacle Financial Advisors LLC  
Queen City Homecare  
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RDL Architects  
Right at Home of Greater Cincinnati  
RiverHills Bank  
Schueler Group  
St. Andrew's Episcopal Church  
St. George's Episcopal Church, Dayton  
St. Mark's Episcopal Church, Dayton  
St. Paul's Episcopal Church, Oakwood  
The New York Community Trust  
VITAS Healthcare  
William's Wishes

# 2017 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. These generous individuals have chosen to leave a legacy that will provide for the needs of older adults in a dignified and compassionate way for generations to come.

Anonymous (2)  
 St. John and Gay Bain\*  
 Margaret Bigham  
 Young Bongfeldt  
 Mr. and Mrs. Jon B. Boss  
 Eleanor A. Botts  
 Ann J.† and Alvin W. Bunis  
 Jill and Ken Burkman  
 Anna K. and George G. Carey IV  
 Mr. and Mrs. Donald Y. Carpenter  
 Chet Cavaliere  
 Mr. and Mrs. A. Burton  
 Closson, Jr.  
 Diana L. Collins  
 Chris Cowan\*  
 Katherine Duval  
 Miss Irene E. Ehrmann  
 Jack† and Helen Fix  
 Mary Beth and Jim Foxworthy  
 Robert and Marion Funk  
 James M. Garvey, M.D.  
 Alan and Tal Gast  
 Elizabeth Goessel-Rule  
 Al and Sandy Harris

Dr. Elizabeth T. Hatcher  
 Robert and Judith Heaton  
 Mr. Charles B. Hedrick  
 Barbara and Theodore High  
 Angela and Noel Horne  
 Kathleen N. Ison-Lind  
 Kathy and Tom Kahle  
 Harry Kangis and Julia Hawgood  
 Susan Kellogg  
 Mr. Jack M. Kirby  
 Lana and K. Jay Kittenbrink  
 Jane Kuntz  
 Jeff and Laura Lamb  
 Miss Pat Landen  
 Keith and Sue Lawrence  
 Susan C. Lehman  
 Mr. and Mrs. Robert G. Linkins  
 The Rev. David B. Lowry  
 Joan Maechling  
 Tom and Nancy McOwen  
 Cece and Tom Mooney  
 Philip G. Osborn†  
 Ken and Pam Paley  
 Joan Trittipio Perkins

Mrs. Betty W. Pippert  
 Mr. Jack Plattner  
 Sue and Tom Pontius  
 The Rev. and Mrs. William E.  
 Rathman  
 Paul and Mary Lee Scheper  
 Michael T. Schueler  
 Elizabeth C.B. and Paul G. Sittenfeld  
 The Revs. Bruce and Susan Smith  
 Robin and Geoff Smith\*  
 Doug and Kathy Spittler  
 Barbara Sporck-Stegmaier  
 Mr. John F. Stevenson  
 Mrs. Delle Ernst Taylor†  
 Dr. and Mrs. Thomas U. Todd  
 Frank and Ginny Uehlin  
 Pat and Bill Victor  
 Mrs. Helene Warrener  
 James P. Wersching\*  
 Mrs. Mary E. West  
 Jack and Elizabeth Williams  
 Anne and Samuel Wilson

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\*We are pleased to welcome these individuals who joined the Living Legacy Society this past year.

† We are deeply saddened by the loss of our friends who passed away in 2017 and would like to extend both our condolences to their family and friends and our humble appreciation for the legacy they have left by including ERS in their estate plans.

# ERS

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WE'RE PUTTING THE "FUN" BACK IN "FUNDRAISING!" YOU WON'T WANT TO MISS IT THIS YEAR!

# THE GREAT GATSBY GALA

## SAVE THE DATE

FOR THE ALL NEW 2018 SPECIAL EVENT TO SUPPORT THE GOOD SAMARITAN MISSION FUND!

THURSDAY, SEPTEMBER 20TH

THE RENAISSANCE HOTEL, DOWNTOWN CINCINNATI

Complimentary parking provided for guests  
Complimentary shuttle for Deupree House and Marjorie P. Lee residents

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