



Summer 2024

INSIDE: 2023 ANNUAL REPORT

# Linkage

## *Rebuilding in 2023*

*Our record setting  
Community Relations Team*

On the front lines with our prospects  
and laser focused on rebuilding communities



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### ON THE COVER

*Episcopal Retirement Services Community Relations Team: Jenn Schlotbom, Marjorie P. Lee; Karen Immell, Deupree House; Elizabeth R. Pace, Episcopal Church Home, under the guidance of Beverly Edwards, VP Residential Healthcare.*  
*Photograph by Gary Kessler*

## ERS Communities & Services

### Premier Retirement Communities

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

### Affordable Living Communities

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

### Community Services

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



## ERS Board of Directors

Albert Smitherman, Chair

Dora Anim, Gay Bain, W. Thomas Cooper, The Rev. Darren Elin - Bishop's Representative, The Rev. John Fritschner, JoAnn Hagopian, Alan Hartman, Gregory Hopkins, Eric H. Kearney, The Rev. John F. Koepke, III, Gerron McKnight, Jennifer Payne, Apryl Pope, Thomas Regan, Tom Retford, Michael Williams, William Woods, Chip Workman, Elizabeth A. Zwilling

## ERS Foundation Board of Directors

JoAnn Hagopian, Chair

Jon B. Boss - Trustee Representative, Anthony Bruns, W. Thomas Cooper, Laura R.P. Lamb, Apryl Pope, Thomas Regan, Chip Workman

## ERS Mission

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

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### We Welcome Your Comments

The Linkage Editor

Episcopal Retirement Services

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513.271.9610 • [info@erslife.org](mailto:info@erslife.org)

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### Linkage is Available Online

To better serve you, Linkage magazine is available via e-mail and on the Episcopal Retirement Services website at [EpiscopalRetirement.com](https://EpiscopalRetirement.com). If you would like to be removed from the Linkage mailing list, please call 513.271.9610 or email us at [info@erslife.org](mailto:info@erslife.org) with your name and address.

### Make A Donation Online

For your convenience, donations are accepted online at [ersfoundation.org](https://ersfoundation.org)

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

Read our Linkage Blog at  
<https://blog.episcopalretirement.com/>



Like us on



# Fifteen Never Looked So Good

*Episcopal Retirement Services Celebrates 15th Consecutive  
Enquirer's Top Workplace Award*



ERS Team Members were asked to submit a photo of themselves at age 15 as a fun way to highlight 15 years.

Episcopal Retirement Services (ERS) was honored to receive the Enquirer's Top Workplace Award for the 15th consecutive year. The award highlights our enduring commitment of creating an exceptional workplace culture. Based on comprehensive team member feedback, this prestigious award underscores ERS's dedication to fostering a supportive, engaging, and empowering environment.

As a leader in aging services, we are dedicated to providing compassionate, person-centered care that meets each resident's unique needs. The committed team members at ERS play a crucial role in achieving this mission, ensuring that residents receive personalized care and enjoy enriching



activities and community events. This commitment to excellence in senior care is a hallmark of ERS's approach.

Winning the Top Workplace Award for an impressive 15 consecutive years is a significant milestone that further solidifies ERS's reputation as a premier employer in the Cincinnati area. This accolade not only boosts staff morale but also reaffirms our mission to make

a meaningful difference in the lives of its team members, residents, and the broader community. It serves as a beacon, attracting potential job seekers who are looking for a workplace that values its team members and fosters a positive work environment. 15 never looked so good! ■



# Meet the Board

**E**RS Board Members bring a wide range of skills and experience to the organization, helping ERS excel in its mission to create communities and programs for older adults that are the gold standard in the industry. The individuals who make this generous commitment to serve offer unique backgrounds that help enhance the quality of life for ERS residents and clients.



## Gay Bain

*Alternate Representative Board Member,  
Deupree House Resident*

***What is your professional background?***

Real estate agent for nearly 25 years. I was the #1 agent in the city for several years and #1 in West Shell for 15 years.

***How long have you been affiliated with ERS?***

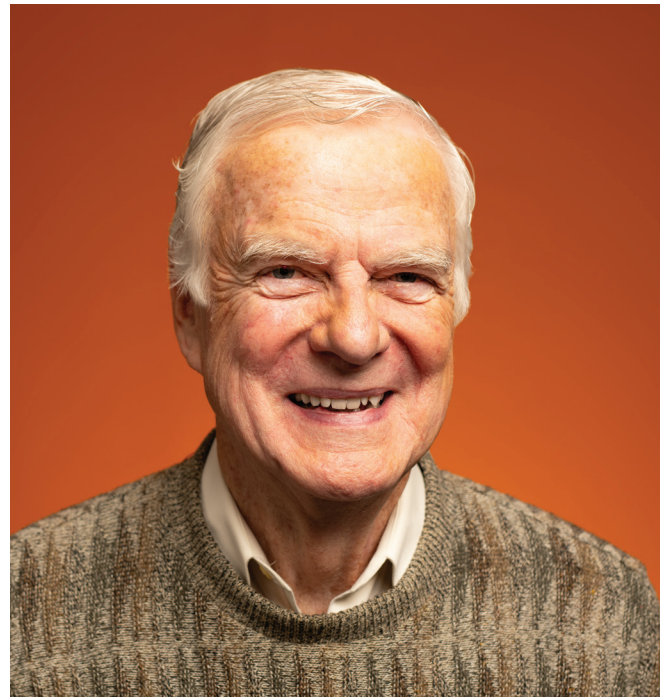
My mother moved into Marjorie P. Lee in 1978 at age 80 and called it home for 25 years!

***How long have you lived at Deupree House?***

My late husband and I moved to Deupree in 2012.

***Why do you volunteer with the ERS Board?***

I feel strongly about representing Deupree House on behalf of the residents.



## Michael Williams

*Alternate Representative Board Member,  
Marjorie P. Lee Resident*

***What is your professional background?***

I have a secondary teaching credential and a master's degree in library and information science. I have worked as a teacher, a school and medical librarian, and as a records manager for an engineering corporation.

***How long have you lived at Marjorie P. Lee?***

I moved into MPL in July 2023.

***Why do you volunteer with the ERS Board?***

I am glad to serve my community of residents as a connection to the Board. I am eager to learn more about the entire organization and its activities.





## Apryl Pope

*ERS Board Member*

*ERS Foundation Board Member*

**Occupation?** Owner and CERTIFIED FINANCIAL PLANNER™ Professional at Retirement Plan Partners, LLC.

**How long have you been with ERS?**

I joined the ERS Foundation Board in 2021 and the ERS Board in 2024.

**Why do you volunteer on the Board?**

I love the work that ERS is doing to support older adults and I am particularly excited about supporting the middle market mission as this is a truly underserved population that I am passionate about serving.

**Most rewarding part?**

Knowing that the work we are doing is helping sustain and improve the quality of life of older adults who have already done so much for our community and society with the work they have done for 30+ years, is very rewarding.

**Any other ERS involvement?**

I participate in the thank-a-thon calling for donors.



## Alan Hartman

*ERS Board Member*

**Occupation?** Attorney for 45 years, currently transitioning into retirement.

**Area of expertise?**

Business law, with an emphasis on transactions related to information technology and intellectual property.

**How long have you been with ERS?**

I am in my first year as a Board member.

**Why do you volunteer on the Board?**

First, because my brother-in-law, Gregg Hopkins, serves on the Board and asked me to consider it; and second, because I had a positive experience with ERS through the rehab services my mother and my uncle received at Marjorie P. Lee.

**Most rewarding part?**

Having a supporting role with an organization that truly appreciates and values its residents and employees and participating in a well-run Board.

**Any other ERS involvement?**

Supporting fundraising activities.



# Rebuilding in 2023: Our strong team with a “can-do” attitude

By Laura Lamb



The ERS Community Relations Team (L-R) Elizabeth R. Pace, Episcopal Church Home; Karen Immell, Deupree House; Jenn Schlotbom, Marjorie P. Lee

Much has been written about how the last few years of COVID-19 have changed the world. In many ways, senior living has experienced the greatest number of challenges. In fact, at the height of the COVID-19 pandemic in 2020 and 2021, retirement communities like Marjorie P. Lee, Deupree House, and Episcopal Church Home were not allowed to move in new residents per regulations. These regulations, coupled with the natural transitions, greatly reduced occupancy in all retirement communities throughout the country. Nationally, retirement communities pre-COVID-19 had occupancy levels of 90%+, whereas, after the pandemic, communities averaged in the mid-70s. ERS's communities faced the reality of needing to rebuild in 2023 – but it wasn't just about rebuilding occupancy. 2023 for Episcopal Retirement Services was about rebuilding community, engagement, and best practices.

“When the chips are down, I would put my money on the ERS community relations team,” Beverly Edwards, Vice President of Residential Healthcare, shared. Edwards, who is responsible for the financials of our three retirement communities, also shared this about the ERS community relations team: “Karen,

Elizabeth, and Jenn are just the team we needed to face this challenge head-on. They understand the importance of occupancy on the organization's financial sustainability.”

## Rebuilding Occupancy

One of the key areas ERS targeted in 2023 was rebuilding occupancy. The landscape had shifted post-pandemic, and those at ERS recognized the need to not only fill vacancies but also ensure the safety and well-being of our residents. In 2023, the focus was not just on filling apartments but on creating welcoming, vibrant communities that prospective residents

**Karen and her team helped more than 31 families to Deupree House in 2023, an all-time record for the community.**

would be excited to call home. “The demand for Deupree House is very strong,” said Karen Immell, Director of Community Relations for Deupree House. “Prospects were thrilled when we could have in-person tours again.” Karen and her team welcomed 31 families to Deupree House in 2023, an all-time record for Deupree House.



## Strengthening Our Community

Rebuilding goes beyond physical spaces; it's also about rebuilding the spirit and connections within our communities. In 2023, ERS initiated several community-driven programs designed to bring residents together. From social events and wellness programs to educational workshops and volunteer opportunities; ERS created spaces where residents could bond, grow, and thrive. These initiatives have enhanced the sense of belonging and community spirit and played a key role in improving overall resident satisfaction. Our prospects also benefited from engagement, including those on our waitlists. Jenn Schlotbom, Director of Community Relations for Marjorie P. Lee, shared the “perks” of being on our waitlists, such as the use of our indoor pool, attending activities, and dining in our lovely dining rooms with new friends. “These perks allow prospects to ‘see’ themselves in our community. I have seen that being involved in a community before moving in makes the transitions much smoother.” Immell has had a similar experience at Deupree House. She shared that prospective residents love interacting with current residents on tours and events. “As we know, Cincinnati is a big city with a small-town feel. Every week, someone reconnects with a resident at Deupree while on a tour. It is fun to be a part of that.”

Elizabeth Pace, Director of Community Relations for Episcopal Church Home (ECH), had the challenge of a \$25M master plan during the COVID-19 pandemic as well. As part of the master plan, Dudley Square, ECH's independent living patio homes, built 25 additional homes. “Residents in our new patio homes are younger. They are planners for their future, quick in decision-making, and know what they want, which was very refreshing!” Pace shared. “The greatest joy was to watch this community come together and welcome all our new residents to their new homes!”

## Getting Back to Normal

Jenn, Karen, and Elizabeth each conveyed that their success would not have been possible without a “back to basics” approach. Events they host on the topics of decluttering, staging a home, and se-

lecting a real estate agent have been very popular. Additionally, residents and team members are the best advertisement for our communities. Being a top workplace for 15 consecutive years is an accomplishment that the community relations team often shares with prospective residents. “When selecting a retirement community, seeing if the staff are happy and engaged is important. We often say if we have a great place to work, we will create a great place to live,” shared Edwards.

**The very thing that caused our need to rebuild occupancy – COVID-19 – has spurred the rebuilding of so much more.**

## A Bit of Irony

The very thing that caused our need to rebuild occupancy – COVID-19 – has spurred the rebuilding of so much more. “If we learned one thing, it would be the need for connection and community,” shares Edwards. Our residents who lived with us during the COVID-19 pandemic never lost their sense of community because they had one another. Living alone in the broader community can be difficult and isolating. People understand that now and are attracted to what our communities offer. “It is about belonging. Our residents have a renewed sense of energy and community,” said Schlotbom. A resident recently shared that it is like she “landed on Planet Nice. Everyone is wonderful and welcoming.”

## Celebrating Success

The community relations team is quick to praise their teams and ERS's leadership: “When everyone does their part, it makes our jobs easier.” Our team's hard work and resilience have been instrumental in overcoming the hurdles. Despite the challenges, all three of our communities boasted a record number of move-ins in 2023, a testament to the trust and confidence that residents and their families place in us. “When you love what you do, it shows,” Edwards said. “And that's not just a catching tagline for our team. Helping prospective residents find their new home is what Karen, Elizabeth, and Jenn do extraordinarily well!” ■

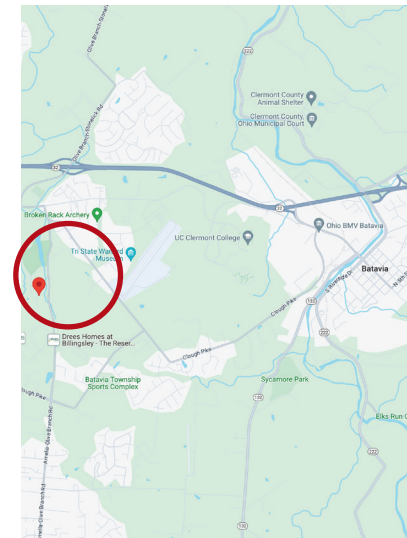


# Middle Market Field of Dreams

By Megan Bradford



Brian Gruber, owner-Ridge Stone Builders & Developers and Dan Steward, CFO-ERS



4177 Amelia-Olive Branch Road.

ERS has made the bold statement that as an organization, we desire to be the standard for Middle Market models in our industry of aging services. This is further defined in ERS's 2030 Vision: As recognized inclusive and innovative leaders, ERS is the preferred choice and trusted resource for older adults along the full economic continuum. Within ERS's OGSP 19.0 Strategy Plan, the third strategy states,

***"Be the standard for Middle Market models while growing the number of older adults served through the development of new communities."***

## Partnerships in Financing Hurdles and Delays

For the second year in a row, debt solicitation in early 2023 proved to be challenging. Feedback and trends showed that banks were holding onto liquidity, reserving capital, and interest levels remained high. With terms less favorable than they were in 2022, and the cost of financing increasing significantly, it was determined that our financing needs were not going to be met by internal solicitation efforts within the commercial banking market. Dan Steward, ERS's CFO, led ERS and the Middle Market Task Force through the process of interview-

ing and selecting an investment banking partner, HJ Sims. With a funding gap identified, the evaluation of creative financing is ongoing with HJ Sims.

In line with ERS's growth strategy and as joint venture partners, ERS and Ridge Stone Builders continue to aggressively pursue the development of its Middle Market community in Batavia, Ohio, The Preserve at Olive Branch. Preparations continue to ensure the site is ready to break ground when the time comes such as completing an archeological study, subdividing parcels, and finalizing the site's design and construction plan.

## The Preserve at Olive Branch

ERS is excited to share a preview of the Preserve at Olive Branch. On just over 40 acres, this 62+ older community will feature 151 Middle Market rental units consisting of a mix of single and multi-unit buildings. Amenities on the property for residents to enjoy will include a centrally located clubhouse with community space, fitness center, outdoor pool, and walking paths. Similar to ERS's Affordable Living communities, The Preserve at Olive Branch and all ERS Middle Market communities are designed with a Service Coordinator model to support residents aging-in-place with the arrangement of a la carte services as needed. ■



# Lauren Brown Empowerment Fund Continues to Change Lives

By Laura Lamb

In the wake of George Floyd's tragic murder in 2020, ERS's Board and Servant Leadership Team initiated the We Can Do Better (WCDB) initiative for the organization. Over the past four years, ERS has been dedicated to fostering an environment where we can live, learn, and develop a deeper understanding of social justice and inequities within our organization and the broader societal context. One tangible outcome of our WCDB work was the creation of the Lauren Brown Empowerment Fund (LBEF), created after the unexpected passing of Lauren Brown, a rising leader of the organization. Her legacy within our organization remains that she was a lifelong learner who wanted to grow and learn. The fund works to preserve Lauren's legacy by supporting BIPOC (Black, Indigenous, and People of Color) team members who would benefit from such an opportunity. The LBEF is not a tuition assistance program but rather an empowerment fund.



In 2023, we made our third award to one of our BIPOC staff members who is in school but faces barriers. The following is a summary of this year's recipient using a pseudonym.



Ashley is a versatile worker at one of our Continuing Care Retirement Communities (CCRCs). She is in the final stretch in school to become a registered nurse. Ashley has successfully managed her work and school schedule while being a mom to four children. It has been a struggle with time and money, but she wants her children to see her set and accomplish goals so that they will know they can, too. In prioritizing school and family, Ashley has unfortunately fallen behind in her utility bills. Ashley knew that catching up with her utility bills would likely necessitate putting off school for an entire semester as winter approached. The LBEF was able to assist with her utility bills so that she could focus on her education and afford tuition payments.

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**Our goal for the Lauren Brown Empowerment Fund is \$500,000.**

**Because of generous donors, to date we have raised just over \$400,000. If you are interested in learning more or would like to contribute to the fund, please ask to talk to a member of ERS's Fund Development department by calling 513.271.9610.**

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# 2024 ERS Gala Series: A Celebration of Community and Creativity

By Joy Blang



Guests at the Sponsor Appreciation Night were asked to help create a communal piece of art. Made from hundreds of colorful butterflies positioned over 3 separate canvases. The artwork will be displayed at the final event, All a Flutter, along with the Fiber Arts exhibit.

Episcopal Retirement Services is excited to announce the remaining events in the 2024 Gala Series, celebrating our community's spirit, creativity, and collective strength. This year's series promises unforgettable evenings filled with entertainment, fine dining, and a shared passion for serving older adults.

**Sponsor Appreciation Night:** Better Together, held in May, celebrated the many corporate and church partners who have collectively contributed over \$220,000 in support of this year's Good Samaritan Mission through the gala series. In addition to their generous charitable support, the impact partners have on the lives of older adults permeates all areas of ERS through their work and service. Because of them, we are Better Together. Special thanks to Presenting Sponsor: Ohio Capital Corporation for Housing and Supporting Sponsors: Christ Church Cathedral, Clark Schaefer Consulting, Model Group and Ridge Stone Builders and Developers.

## Queen City Soirée

The Queen City Soirée, sponsored by The Episcopal Church of the Redeemer, will be held at the prestigious Cincinnati Woman's Club Friday, October 4th from 6:30pm to 9:30pm. This elegant evening begins with a VIP reception and champagne toast, followed by cocktails, hors d'oeuvres, and a gourmet dinner. Guests will be entertained by Queen City Cabaret, performing a "Sentimental Journey" with classics from the Great

American Songbook, celebrating Cincinnati icons like Rosemary Clooney and Doris Day. Semi-Formal attire is suggested.

## All a Flutter

Our final event, All a Flutter, sponsored by TheKey and Building Management Partners, will take place at The Barn in Mariemont on Friday, November 8th from 6:30pm to 9:30pm, with the monarch butterfly symbolizing the resilience and beauty older adults served by ERS have embodied throughout their entire lives. This event features the nationally renowned Cherrywoods Challenge Fiber Arts exhibit and performances by Pones, an ERS wellness partner known for engaging dance and performance art experiences.

The evening includes cocktails, hors d'oeuvres, and a sumptuous dinner by Jeff Thomas Catering. The historic setting, home of the original UDF Dairy Barn, provides a unique ambiance for this vibrant celebration. Suggested attire will be Dressy Casual - Vibrant colors recommended, like a butterfly!

Join us for these spectacular evenings as we celebrate community, creativity, and the collective efforts that make ERS a cornerstone of support for older adults. Each event is a testament to the strength we find in unity and the joy of coming together to make a lasting impact. To register for individual tickets and packages, go to [erslife.info/gala](https://erslife.info/gala) or call 513-979-2308. ■





# Shannon Braun Received APA's Outstanding Leader in the Field of Aging Award

By Megan Bradford



Shannon Braun, Director of ERS's Center for Memory Support and Inclusion, received the APA's Outstanding Leader in the Field of Aging award for her work on Alzheimer's Disease and dementia. Shannon, in gold, is surrounded by ERS team members and her mother (far right).

Shannon Braun, Director of Episcopal Retirement Services' Center for Memory Support and Inclusion (CMSI) since February 2020, was honored with the Association for Professional Aging's (APA) Outstanding Leader in the Field of Aging award for her exceptional contributions to Alzheimer's Disease and dementia care.

From the outset of her role, Shannon Braun has emerged as a pivotal figure in Cincinnati's journey toward dementia inclusivity. Braun steadfastly pursues her vision to educate and support the community. She collaborates extensively, educating diverse groups including the Cincinnati police department, church leaders, museum docents, local musicians, movement instructors, and healthcare providers.

Drawing on her experience as the Alzheimer's Association's Early Stage Coordinator, Shannon

Braun focuses on enhancing social engagement for individuals with dementia. She has established innovative programs such as "With Art in Mind"; providing monthly museum tours tailored for individuals with dementia and "Dancing to Remember"; a collaboration with the Giving Voice Foundation featuring ballroom dancing classes with a local dance studio. Additionally, she partnered with UC's Memory Care and Brain Center to provide biannual support groups for caregivers and their loved ones facing new dementia diagnoses.

Shannon Braun's efforts have enriched countless individuals' lives and underscores the importance of community collaboration in dementia care. Her initiatives, supported by grant funding secured by ERS, ensure that these vital services are accessible to all, free of charge. ■

# Dear Friends,

If I had only one word to describe 2023, it would be “rebuild.” In all aspects of ERS, there are threads of rebuilding in 2023: Our residents were re-energized and returned to the full swing of their lives. We re-established our teams after the pandemic. Our staff restored services that were on hold due to staffing challenges. We rebuilt stable occupancies to ensure financial health. No matter the subject, we know that recreating takes more energy than maintaining. Therefore, it is not surprising to anyone who lived at or worked with ERS that 2023 was a difficult yet rewarding year.

Our Annual Report for 2023 is a testament to ERS’s resilience. We are fortunate to be a strong organization that has weathered the storms of COVID-19, rising interest rates, and a hardened labor market. The tenacity of our residents, staff, and partners to recreate, restore, and rebuild has been remarkable. The annual report on the following pages not only highlights our financial position but also shares success stories from the year, inspiring us all for the future.

- 2023 presented ERS with financial challenges, primarily due to the record number of resident transitions through our continuum of care. These transitions have strained our community relations teams and our budget. However, despite these challenges, our team welcomed a record number of residents in 2023. The pressure we faced also helped us identify numerous opportunities for improvement.
- Our staff are at the heart of all we do. In 2023, we invested significantly in our staff wages to ensure we could recruit and retain top talent to care for our residents. Many teams had significant openings. In this report, we have highlighted how we recreated our Deupree House dining team. This team represents many of our teams throughout the organization.
- We were blessed to have several tax credits awarded for some Affordable Living communities. In 2023, we had three communities under development – one new community and two projects to restore existing communities. Read about our new community, Pedretti Place, and the next chapter on our Wilmington & Blanchester campuses.
- ERS made headway in rekindling our desire to grow in the Middle Market by making our site in Batavia, Ohio “shovel-ready” while we wait for bank terms to equalize. The greatest need for older adults in the future is for those who would be served in a community like Batavia. They are “stuck” in the middle with too many assets for an Affordable Living community, but not enough for a continuing care retirement community.

We are deeply grateful for the unwavering support and steadfast leadership of those who serve on our Boards and Committees. Thank you to every resident, family member, volunteer, donor, and partner for your invaluable support of ERS as we have rebuilt. With you at our side, we are committed to excellence in aging services and senior living communities.



Sincerely,

A handwritten signature in blue ink that reads "Laura R. P. Lamb".

**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.

33,145

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

### ERS Ministry Reaches Across the Tri-State in 2023



\*Parish Health Ministry is on temporary hiatus.

#### The Affordable Living by ERS communities

- |   |   |   |
|---|---|---|
| A Canterbury Court                                | K Green Hills Affordable Living   | S Maple Knoll Meadows                                       |
| B Cambridge Heights                               | L Trent Village   | T Madison Villa   |
| C St. Paul Village (2)<br>St. Paul Village I & II | M Walnut Court  | U New Carlisle Village (2)<br>Rachel Court, Sunrise Terrace |
| D St. Pius Place                                  | N Central Parkway Place   | W The Manse   |
| E Shawnee Place                                   | O Knowlton Place  | X Scheper Ridge   |
| F The Elberon                                     | P Prairie Oaks Village (4)<br>Prairie View, Friendly Center,<br>Quaker & Mulberry Place | Y Woodburn Pointe   |
| G Forest Square                                   | Q Westminster Court (3)<br>Westminster Court I & II,<br>Esther Tuke                     | Z Pedretti Place<br>(Site work began in 2024)               |
| H Parkview Place                                  | R Marlowe Court   |   |
| I Thomaston Woods                                 |   |   |
| J Thomaston Meadows                               |   |   |

# 2023 Overview and Financial Report

The financial information below is for the year ending December 31, 2023. This financial information is based on audited financial data compiled by the staff of Episcopal Retirement Services. Additionally, this information was subjected to independent external audits with final reports for both 2023 and 2022 available upon request.

## Condensed Balance Sheet *As of December 31, 2023*

Assets	2023	2022
Current Assets	\$25,304,225	\$26,053,001
Investments and Reserves	\$38,608,039	\$36,267,261
Fixed Assets	\$233,381,376	\$238,686,643
Beneficial Interest in Endowments	\$35,559,658	\$32,228,658
Other Assets	\$5,734,437	\$6,166,728
<b>Total Assets</b>	<b>\$338,587,735</b>	<b>\$339,402,291</b>

Liabilities	2023	2022
Current Liabilities	\$16,834,159	\$15,702,905
Unamortized Entrance Fees	\$41,151,224	\$35,570,965
Long-Term Debt	\$92,752,670	\$97,912,668
Other Liabilities	\$290,023	\$245,115
<b>Total Liabilities</b>	<b>\$151,028,076</b>	<b>\$149,431,653</b>

Net Assets	2023	2022
<b>Total Net Assets</b>	<b>\$187,559,659</b>	<b>\$189,970,638</b>
<b>Total Liabilities &amp; Net Assets</b>	<b>\$338,587,735</b>	<b>\$339,402,291</b>

## Condensed Statement of Revenue and Expenses *For the year ending December 31, 2023*

	2023	2022
Operating Revenue	\$57,697,480	\$53,288,115
Operating Expense	\$(72,440,059)	\$(67,561,388)
<b>Net from Operations</b>	<b>\$(14,742,579)</b>	<b>\$(14,273,273)</b>

	2023	2022
Non-Operating Revenue (Expense)	\$8,791,748	\$1,217,660
<b>Total Net Loss</b>	<b>\$(5,950,831)</b>	<b>\$(13,055,613)</b>

## 2023 Contributions and Commitments

**\$907,004**  
*Good Samaritan Mission  
Gifts and Grants*

**\$352,041**  
*Realized Planned Gifts  
in 2023*

**\$1,376,352**  
*Capital Gifts and  
New Programs*



## The Good Samaritan Mission Fund

# \$2.79 Million

Total Ministry Costs

## \$1.15M

Residential Financial Aid

## \$1.26M

Affordable Living by ERS

## \$241,807

Spiritual Care

## \$60,009

SAIDO Assistance Fund

## \$39,267

The Staff Assistance Fund

## \$34,364

Volunteer Coordinators

## \$10,945

Community Outreach programs

## \$5,015

Partners In Care Fund

## \$0\*

Deupree Meals On Wheels

\*The Meals On Wheels program experienced growth in meals, growth in clients, costs and staff levels were maintained while reimbursement increased. Therefore, 2023 ministry costs were \$0.

## Ministry for residents or through ongoing support

# 4,221

People served as residents or through ongoing support

## 1,996

Affordable Living Residents

## 589

Deupree Meals On Wheels Clients

## 521

Skilled Nursing Care Residents

## 360

Independent Living Residents

## 99

Personal Care Residents

## 146

Middle Market Residents

## 75

Living Well Senior Solutions Clients

## 7

Pete's Eats Clients

## 315

Swipe 'N' Dine Registrants

## 143

Student Educational Experience

## Ministry through community outreach

# 28,924

Number of contacts by people seeking information/education

## 41,401

Linkage Online Blog Views

## 777

Episcopalretirement.com Downloads

## 2,478

ERS Center for Memory Support & Inclusion Contacts

## 2,500

Community Outreach Education Contacts

Growth in Affordable Living by ERS

Number of Apartments



# A New Era for Deupree Dining

By Caroline Puryear



(L-R) Pete Juszczuk, Sam Gillivan, Sofia Aveyard, Eugene Gaines, Madison Daly, Eric Graham, Sr., Rodney Nixon, and Gareth Aveyard

At Deupree House, dining is as busy as ever, thanks to the dedicated culinary team that ensures residents have access to a top-notch dining experience. However, navigating the service industry post-COVID-19 was not easy according to Dining Services Director Pete Juszczuk and Executive Chef Sam Gillivan. As pandemic restrictions eased and the world adjusted to a new normal, a rough labor market proved it difficult to replace the staff they had lost. This left them to make difficult decisions about service to residents. “The biggest focus was day-to-day operations to make sure we were fulfilling the residents’ expectations,” Juszczuk said. “We still strived every day with our commitment to serve residents.”

Gillivan, who oversees daily operations alongside Juszczuk, explained that at the height of the culinary shortage, it was just the two of them. This resulted in a brief shift to take-out meals, delayed reopening of services such as Grille 39, the casual counterpart to the traditional dining room, and a popular employee dinner take-out program.

However, after three years, they now have a full culinary team. “We opened up the dining room gradually,” Gillivan explained, saying that residents saw signs of hope when the traditional dining room returned to a full à la carte menu.

The residents were thrilled when they heard Grille 39 was reopening for lunch service. A favorite, the Grille is an extension of the traditional dining room offering a casual menu of soups, salads, and burgers. “Everyone has been very welcoming to it,” Deupree House resident

Pat Donaldson said. “It affords us another option.”

Grille cook Eric Graham noted that it has also served as a new social meeting place. “They’ll come down here and play cards,” Graham laughed. He explained that, for many residents who moved in during the pandemic, Grille 39’s opening has allowed them to meet new neighbors and create connections with each other and employees.

Grille 39 opened for weekday lunch and dinner services in June. Juszczuk said the team aims to include weekend service by the end of Summer 2024 once they have a full server team. “We are excited to restore the services we had prior to the pandemic,” Juszczuk said.

Through a popular take-out program, staff members can also take home a delicious meal for their families at a discounted rate. “They can take care of themselves and those in their life,” Juszczuk shared. “It’s so convenient.”

As for the future, Juszczuk and Gillivan both expressed excitement for new opportunities. “I can do the fun part of my job now,” Gillivan exclaimed. In April, he hosted the first Texas Barbecue Extravaganza to introduce residents to a new era of dining at Deupree. Residents enjoyed coming together to partake in delicious food, laughter, and comradery that had been missing from the dining room for far too long.

“The residents are so appreciative, that makes us want to come to work,” Eric Graham said with a smile. “Going forward I just want us to keep prospering.” ■



# Living Well Senior Solutions Snapshot

By Megan Bradford



Wedding



Front Row (L-R) Betsy Babb, Kathy Braun, Peggy Slade-Sowders  
Back Row (L-R) Susan Miller, Mindy Horgan, Margaret Saxton, Sarah Shaffer



Opera

Serving as one of ERS's outreach ministry programs, Living Well Senior Solution (LWSS) is a care management service for older adults in need of additional support in navigating the healthcare system and their care needs both within the ERS network and in the broader community. For over 16 years, Peggy Slade-Sowders has served as the program's Director. Emulating ERS's Core Values and Ways of Working, Peggy's dedication to her clients and support of her fellow team members has created a team which is equipped to serve their clients in a person-centered way, focusing on what matters most to each individual. Peggy describes the team as, "An extraordinary Care Management and Concierge team that is dedicated to advocating for quality care, informed decision making, and self-determination."

## Making Dreams Come True

In the spring of 2023, a LWSS client shared with her Care Concierge that she was worried she wouldn't be able to travel to the Adirondacks in New York State for the summer, as she had done for the last 60+ years. While various family members were able to be there to support her much of the summer, there was a two-week gap of support coverage that needed to be secured before the summer away could be officially on the books.

Without hesitation, two LWSS team members jumped into action to support the client in a variety

of ways – including time spent at their clients "home away from home" and a road trip back to Cincinnati at the end of the summer. Without the support of LWSS, the client's annual summer tradition would have come to an end. Instead, the client and her LWSS team enjoyed paddleboarding, hiking, and picnics with old and new friends. One team member shared, "It was truly a magical place. We all had a great time."

## The Little Things Closer to Home

The LWSS team begins each client interaction with one goal in mind: How can I support my client to be as safe, healthy, and engaged as possible in what matters most to them. There is no request or wish too big or what some may consider small. If something matters to their client, it is just as important to them. This could mean anything from stocking up on a client's favorite ice cream flavor or arranging for medication to be delivered directly to the client's home. In 2023, a LWSS team member accompanied a client to a local family wedding. Without this support, the client would have been unable to attend the event. LWSS' support meant the world to him; his smile says it all. Peggy summarized the experience beautifully stating, "I am so grateful LWSS is able to support our clients and their families as they experience both challenges and joys in life." ■

# Welcomed Progress in ERS Affordable Living

By Megan Bradford

2023 was a year of tremendous progress in funding and construction for three ERS Affordable Living communities.

Historically, ERS Affordable Living deals have closed around 12 months after an award is received, due diligence is completed and any additional funding has been secured. However, due to COVID-19, the last few years have proved challenging in many ways. Like other areas of ERS, Affordable Living faced financing delays and significant, unanticipated increases in construction materials and labor costs. Additionally, HUD funds presented unique challenges in receiving various needed approvals. Over the last several months, the Affordable Living team has worked diligently to close the increased funding gaps. The Ohio Housing Financing Agency (OHFA) awarded ERS additional housing credits for Prairie Gardens in Wilmington, Ohio, and Westminster Court II in Blanchester, Ohio. With these funds secured, official closings for Prairie Gardens (originally funded in 2020) and Westminster Court II (originally funded in 2021) took place in the summer of 2023.

the rehab of a 10-unit community nearby, Mulberry Place. Additionally, the comprehensive renovation of Westminster Court II's 50-unit 2-story building is underway. Updated apartments will meet modern day accessibility standards, energy efficient appliances, new floors, and updated finishes, as well as enhanced energy efficiency across the community. Construction is ahead of schedule for both projects, with completion anticipated in late summer 2024.

Financing for a third deal made tremendous progress in 2023. ERS was awarded Pedretti Place in 2022 and, like other projects, was met with a significant funding gap due to construction cost increases after the award was received in 2022. With the hard work of the Affordable Living team, several additional funding sources were received to fill the gap and allow the project to move forward.



Prairie Gardens

Construction is in full swing at both properties



Pedretti Place

After much anticipation, Pedretti Place officially closed in March of 2024; construction of the new 48-unit building is now underway in Delhi Township. Pedretti Place will feature 1- and 2-bedroom apartments, as well as a large community room, fitness center, laundry room, outdoor covered patio, and on-site staff offices. Construction is on schedule, with anticipated completion in June 2025.

"The hard work was worth it." Janet Westrich, Affordable Living's project development manager, shared. "The work accomplished in 2023 represented years of efforts to overcome many challenges. With teamwork and perseverance, these projects are moving quickly towards the end goal of providing safe, modern homes in updated communities for 140 older adults." ■



Westminster II

The original structure at Prairie Gardens has been demolished to make room for 32 new, garden-style units across 6 buildings. This project also includes



## 2023 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 2023 through their philanthropic investments of \$1,000 or more.

### Gifts of \$20,000 and above

Estate of Benjamin F. Few, Jr.

### Gifts of \$10,000–\$19,999

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Paul Scheper\*

Robert and Tori Spagat

Juanita "Weezie" Walker+

## Morton Society Members:

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

Georgine Buckwalter

Ann Davis

Stephen and Barbara Ellis

James and Kathy Hendon

Keith Knapp

Wendell Meyer and Ann Stevenson

Robert and Sharon Nesmith

Gordon and Nancy Ragan

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Virginia and James Woodward

(\*) Denotes an ERS Corporate Board, ERS Foundation Board, ECH Foundation Board, Affordable Living Board, or Committee Member in 2023; (^) Denotes a Staff Member in 2023; (+) Denotes an individual who passed away; (~) Donation was made via The Community Foundation; Note: Every effort was made to accurately recognize donors for their generous contributions. Please contact the ECH Fund Development office at 502.813.4895 if you believe an error has been made in the listing of your gift so that we can correct it in future listings.

## 2023 Community Partnerships

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

### Gifts of \$20,000+:

The Ellen A. and Richard C. Berghamer Foundation  
 Christ Church Cathedral  
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The Diocese of Southern Ohio  
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 The Springfield Foundation

### Gifts of \$5,000–\$9,999

William P. Anderson Foundation  
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 Riverhills Bank  
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### Gifts of \$1,000–\$2,499

Aegis Protective Services  
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 Deffet Group  
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 RSM US  
 St. Mark's Episcopal Church  
 St. Paul's Episcopal Church  
 Vogt Strategic Insights  
 Ziegler Senior Living Finance



## 2023 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.

Anonymous (4)  
 Frances N. (Nicky) Bade  
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 Dr.+ & Mrs. Thomas U. Todd  
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 Mr. James Wersching  
 Jack+ and Elizabeth Williams  
 Anne\* and Samuel+ Wilson

### Planned gifts realized in 2023

The Estate of James T. and  
 Jayne T. Aglamesis  
 The Estate of Marilyn F. Bubel  
 The Estate of Wilson and Nancy Breiel  
 The Estate of Elizabeth Lilly  
 The Estate of Cece and Tom Mooney  
 The Estate of Eli and Ilona Perencevich  
 The Estate of Dr. Elizabeth Goessell Rule

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## 2023 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.

### Platinum Level: \$10,000+

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George Fabe Fund of Greater Cincinnati Foundation  
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Noel\* and Angela Horne  
Linda Klump\*  
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## Donor Profile:

# Linda Callard

By Jonathan Fissel

Linda and George Callard's story is a tribute to their humbleness, kindness, and deeply rooted Christian and philanthropic values, instilled by their parents. Known for their quiet giving and gentle spirits, the Callards have greatly assisted Episcopal Retirement Services (ERS).

Linda and her late husband, George, met while working at Johns Hopkins Hospital. Linda started her career in pediatrics. George was one of the pioneers in the open-heart surgery at Christ

Hospital. Their shared desire to help and care for others laid the foundation for a life of service. "We've always felt it's our duty to serve others and the community," Linda says.

The Callards' decision to support ERS is based in their faith of the organization's mission to enrich the lives of older adults. "We were drawn to ERS because it aligns with our values and we wanted to make a difference," Linda says. They like ERS's whole-person approach to care and the focus on dignity and respect for all residents.

In the early 1970s, Linda and others stepped in when it was noted that there was a need for volunteers to help residents at Marjorie P. Lee. Linda credits this time spent in service for deepening her connection to ERS, reinforcing her dedication to supporting the mission.

Linda and George had always planned to move to ERS one day. In 2020, George moved to the Deupree Cottages, where he was cared for in his final days. Linda moved into Deupree House, where she is a current resident.



Deupree House resident Linda Callard knows "Every gift, no matter the size, makes a difference and helps ERS do its good work."

This year Linda made a generous gift to ERS. This opened a matching gift opportunity to encourage others to give to the Good Samaritan Mission Fund, specifically designed to motivate existing donors to give more and for new donors to join in supporting

ERS. "I hope my gift inspires others to give," says Linda. "Every gift, no matter the size, makes a difference and helps ERS do its good work."

Linda is quick to point out that without George, their philanthropy would not be possible. "George was a generous man. His strong love of medicine and desire to help others inspired me every day. Our giving is a continuation of the values we shared and the life we lived together."

Their giving reflects a lifetime of service and community. "We learned giving from our parents. George and I instilled that in our children," Linda says. She believes supporting ERS today honors its values and ensures future generations can benefit from the care and programs ERS offers. ■



Episcopal Retirement Services

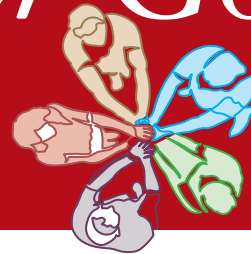
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