

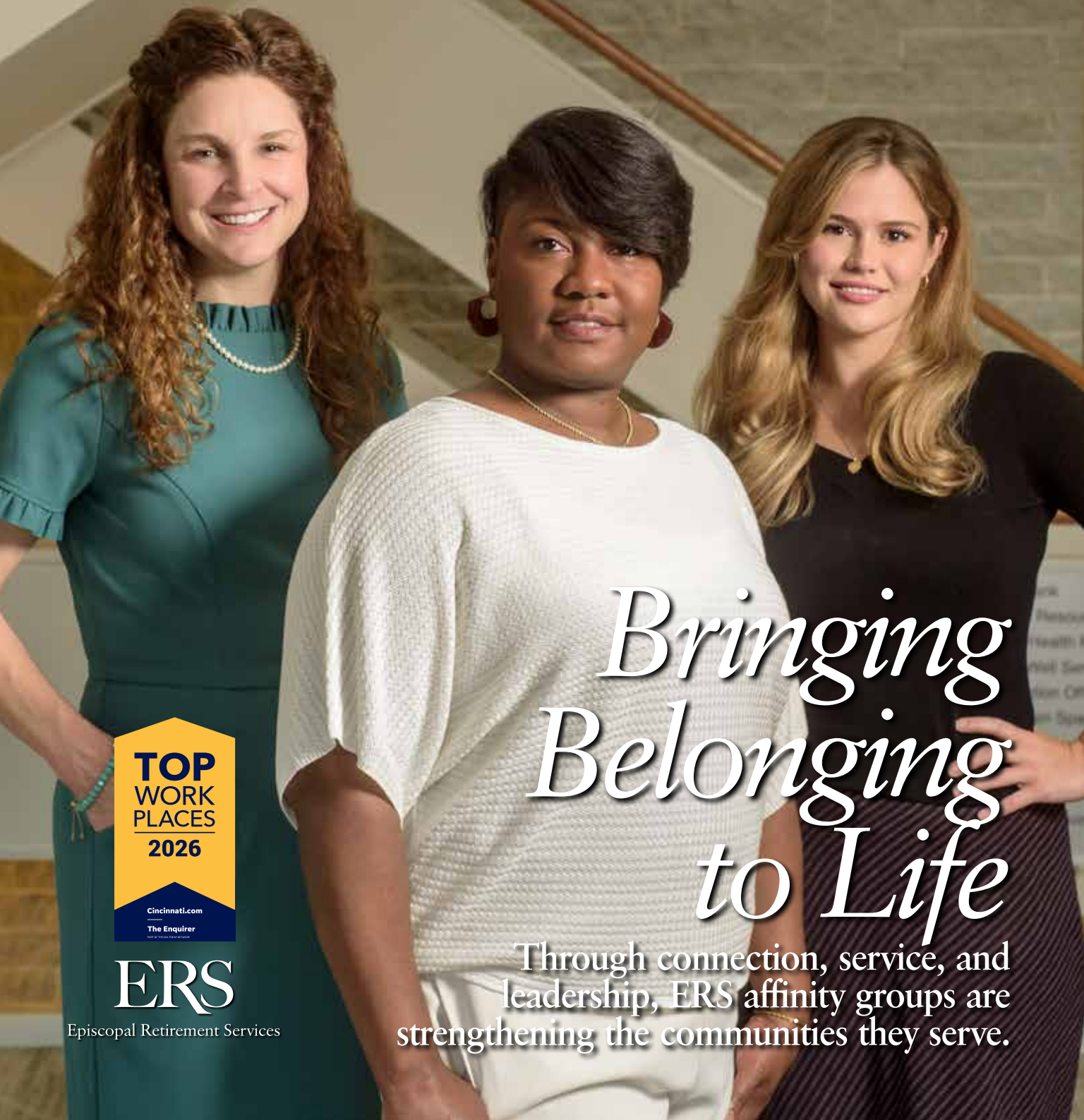


Summer 2026

Linkage

INSIDE: 2025 ANNUAL REPORT

75
YEARS
CARING ON TRADITION



Bringing Belonging to Life

Through connection, service, and leadership, ERS affinity groups are strengthening the communities they serve.

**TOP
WORK
PLACES
2026**

Cincinnati.com
The Enquirer

ERS

Episcopal Retirement Services

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ON THE COVER

Episcopal Retirement Services Affinity Group Members: DD Farmer, Caroline Puryear, and Janet Westrich

Photograph by Gary Kessler

ERS Communities & Services

Premier Retirement Communities

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

Affordable Living Communities

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

Community Services

Deupree Meals On Wheels, Living Well Senior Solutions, Swipe 'N' Dine, The ERS Center for Memory Support and Inclusion



ERS Board of Directors

Chip Workman, Chair

Dora Anim, Alex Campbell, Patti Dunham, Alan Hartman, Crystal Holliday
Eric Kearney, The Rev. Canon Jack Koepke, Gerron McKnight, Apryl
Pope, Harvey Roberts, Michelle Webster, Noel Horne, Nancy Finklemeier,
Michael Williams, and Pat Smart

ERS Foundation Board of Directors

JoAnn Hagopian, Chair,

Anthony Bruns, W. Thomas Cooper, Laura R.P. Lamb, Thomas Regan,
Chip Workman, and Rev. David Pfaff, Trustee Representative

ERS Mission

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

We Welcome Your Comments

The Linkage Editor

Episcopal Retirement Services

3870 Virginia Avenue • Cincinnati, Ohio 45227

513.271.9610 • info@erslife.org

Editor: Paige Davis; Writers: Megan Bradford, Dan Steward, Joy Blang,
Jonathan Fissel, Caroline Puryear, Paige Davis, and Laura Lamb

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. If you would like to be removed from the Linkage mailing list, please call 513.271.9610 or email us at info@erslife.org with your name and address.

Make A Donation Online

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

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

Read our Linkage Blog at

<https://blog.episcopalretirement.com/>



Like us on



Seventeen Years Strong

ERS Celebrates 17 Years in a Row as a Top Workplace



Team members across ERS, from Affordable Living and Deupree Cottages to the Marjorie P. Lee, are all smiles as we celebrate receiving the Top Workplace award once again. Photo 1: Karen Caldwell, Craig Kaiser, Garrett Wells, Manddy Miller, Shante Delton, Kristen Dille, Katie McAtee Photo 2: Kathy Alsept, Jen Rapien, Stacy Jarvis, Jen McFarland, Bonnie Fraser Photo 3: Amy Sims, Donna Craig Photo 4: Jonathan Fissel, Caroline Puryear, Arlan Graham Photo 5: Regina Kittles, Tina Grayson Photo 6: Lotte Holland, Autumn Hay Photo 7: Holly Jordan, Gabriella Fairbanks

Episcopal Retirement Services (ERS) has yet again earned the prestigious award of a Top Workplace by The Cincinnati Enquirer and Energage!, making it an incredible 17 straight years of receiving this award. ERS is the only senior living organization in the region to receive this recognition every year since the award's inception. The recognition is significant not only for its longevity but also for being based entirely on team members' feedback. Rather than being decided by a panel of judges, this award is based on anonymous employee surveys that rate their workplace culture across nearly 30 categories, including purpose, trust, leadership, communication, and belonging.

This achievement is due to the dedicated team members who make ERS an extraordinary place to work and live, empowered by the organization's unique culture, which revolves around mission, service, and the enrichment of older adults' lives.

"When I think about being a Top Workplace for 17 years, I don't think about an award—I think about the thousands of interactions that made it possible," said Laura Lamb, President and CEO of ERS.

"Every dedicated team member who treats residents like family, supports a coworker, or goes beyond what is required because they believe in our mission. That's what 17 years strong looks like."

An important component of that culture includes ERS' Ways of Working, a set of principles that helps the teams interact and collaborate. Based on the organization's values, the Ways of Working ensure that the person-centered approach applies not just to the residents and communities ERS serves but also to its team members.

Vice President of Human Resources Joan Wetzel says that maintaining a healthy workplace culture for nearly two decades takes effort.

"Longevity in workplace culture is rare—and it doesn't happen by accident," Joan said. "It happens because people feel seen, valued, and connected to something bigger than themselves."

17 years of real impact on the older adults ERS serves, as well as on the lives of its team members, is a testament to the high-quality care and meaningful community the organization has built throughout Cincinnati and the Tri-State. ■

Meet the Board

ERS 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.



Harvey W. Roberts

ERS Board Member

What is your professional background?

I spent most of my career in public service, serving eight years in the US Coast Guard Reserve, three years as an EMT and firefighter, and working as an Olympia police officer.

How long have you been affiliated with ERS?

After moving into the Episcopal Church Home (ECH), I joined the ECH Foundation Board as a resident representative. Through this role, they connected with the ERS leadership team and was later appointed to the ERS Board of Directors in January 2026.

Why do you volunteer with the ERS Board?

I believe in the work that ERS is doing serving older adults in its various lines of business.

How long have you lived at Episcopal Church Home? My wife Marsha and I moved to Episcopal Church Home's Dudley Square in May of 2022.



Nancy Finklemeier

DH Alternate Resident Representative

What is your professional background?

Critical Care Clinical Nurse Specialist and founder of a medical device company.

How long have you been with ERS?

My connection to ERS spans from my days as a nursing student visiting Meals on Wheels, to the exceptional rehab care my husband received at Marjorie P. Lee in 2016. I witnessed firsthand the outstanding, compassionate care and unique environment at Deupree Cottages.

Why do you volunteer on the ERS Board?

Serving on the board allows me to channel my professional skills, judgment, and voice into strong governance and responsible stewardship.

Any other ERS involvement?

As a lifelong supporter of the Episcopal Church and faith-based not-for-profits, I'm interested in learning about opportunities.

How long have you lived at Deupree House
I've lived at Deupree House for 9 months.

Celebrate ERS ⁷⁵ YEARS

CARING ON TRADITION

The ERS family has grown in the 75 years since the doors first opened at the Reese House in Clifton. We are proud to celebrate with the residents, families, staff, partners, friends, and neighbors with whom we've lived and worked for many years. Celebrations continue through September. Cheers to 75 years.



Patricia Smart

MPL Alternate Resident Representative

What is your professional background?

I am a licensed psychologist with experience in hospitals, pain management programs, and private practice in Ohio and Texas. Before earning my Psy.D., I worked as a registered nurse in psychiatric hospital settings.

How long have you been affiliated with ERS?

I have been affiliated with ERS for two years since moving to Marjorie P. Lee and recently began serving on the ERS Board of Directors.

Why do you volunteer with the ERS Board?

My husband's work with Maple Knoll Village deepened my appreciation for serving older adults. I am honored to contribute to ERS' mission and support its continued success.

How long have you lived at Episcopal Church Home? I have lived at Marjorie P. Lee for two years and have enjoyed the welcoming community, meaningful activities, and strong connections among residents and staff.



Gatherings for Good

INTIMATE & FUN EVENTS TO BENEFIT THE GOOD SAMARITAN MISSION

PRESENTED BY:



modelgroup



Two Extraordinary Experiences, One Great Cause: Older Adults

Episcopal Retirement Services (ERS) is pleased to announce the return of Gatherings for Good, its signature fundraising series that brings together friends and supporters for unforgettable experiences while advancing its mission of serving older adults. This fall, guests will have the opportunity to attend two distinctive events.

Falcon's Landing

Friday, September 25 | 6:30 – 9:00 PM
Meshewa House at Turner Farm in Indian Hill



Set amidst the historic beauty of Meshewa House in Indian Hill, Falcon's Landing offers an elegant evening inspired by the property's rich heritage. Originally developed in the 1920s, Meshewa House remains dedicated to preserving both the land and the idyllic, bygone way of life it represents.

Guests will be welcomed with cocktails and hors d'oeuvres on the grounds before enjoying a gourmet dinner inside the stately home. Attendees will also have the opportunity to explore the property and experience a live falconry demonstration—a unique encounter with one of nature's most majestic birds. Falcons symbolize courage, strength, protection, and vigilance, qualities that reflect both the older adults served by ERS and the compassionate individuals who support them.

The Sphere of Life

Friday, November 13 | 6:30 – 9:00 PM
Mercantile Immersive, Downtown Cincinnati



For those seeking a completely different adventure, The Sphere of Life promises an immersive and imaginative journey. Inspired by the spectacular multi-sensory experience of Las Vegas' Sphere, this innovative event will transform an evening into a mystery destination.

Guests won't know where their travels will take them until they arrive. They may find themselves transported to a dramatic red-rock canyon, exploring an underwater world, or dining in the elegance of a grand European château. Wherever the journey leads, attendees can expect exceptional cuisine, engaging entertainment, and meaningful connections.

The event also serves as a tribute to the remarkable lives of the older adults we serve—individuals whose collective experiences have taken them across countless miles, cultures, and adventures throughout their lifetimes.

**For more information and to purchase tickets,
visit erslife.info/gala or call 513.979.2308**

Stronger Together: How ERS Affinity Groups Bring Belonging to Life

By Laura Lamb



ERS affinity groups put belonging into action. Members of each group lead initiatives that foster inclusion, build meaningful connections, and bring ERS' values to life.

At Episcopal Retirement Services (ERS), belonging isn't a buzzword. It's a daily practice, lived out through people who choose to show up for one another. Nowhere is that more visible than in the three affinity groups that anchor ERS' We Can Do Better (WCDB) initiative. These team member-led groups don't wait for



permission to make a difference. They create it—one conversation, one celebration, and one act of generosity at a time.

Together, they form the heartbeat of an organization committed to living our Episcopal values and the simple belief that everyone deserves a place where they feel seen.

Honoring History, Confronting Bias



The Black, Indigenous, and People of Color (BIPOC) Affinity Group leads with both courage and care. This year, the group hosted Interrupting Bias training for every team member across ERS. The sessions gave people real tools to recognize bias in the moment and respond with confidence rather than silence. It's not always comfortable work. But the group understands that growth rarely is, and they guide each conversation with patience and respect.

Then came a celebration that ties the past to the present. The group hosted a cocktail party at The Manse Apartments, an ERS Affordable Living community with deep roots in Cincinnati's African American history. The building once operated as the Manse Hotel, a destination listed in the Green Book—a guide that pointed Black travelers toward safe, welcoming places during segregation. Renowned musicians, athletes, and civil rights leaders once walked its halls.

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"We don't just mark Juneteenth as a historical event—we embrace it as a reminder to stay committed to building communities where everyone belongs," said Jimmy Wilson, ERS Vice President of Affordable Living. "Standing in that ballroom, you feel the weight and the joy of it all at once."

It's a living tribute, reminding everyone that the work of belonging stands on the shoulders of those who came before.

Generosity That Reaches Beyond the Walls



The Young Professionals (YP) Affinity Group proves that care doesn't stop at your own front door. As the holiday season approached, the group organized a gift card drive for residents in ERS' Affordable Living communities. The goal was simple and heartfelt—make sure every resident feels remembered during a season that can feel lonely for some.

Team members rallied behind the effort, and the gift cards added up. Each one carried more spending power. It carried a message: you matter, and we're thinking of you. For residents who may not have family nearby, that message landed with real meaning.

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What made the drive special was its reach. The YP group served residents they may never meet, in communities across the region. And that's the point. The group understands that a strong organization cares for the whole

community, not just the corner of it they see every day. Their generosity reflects an ERS value in action—relationships first.

Empowering Women to Lead and Thrive



The Women in Leadership Affinity Group brings energy, creativity, and practical wisdom to its work. This year, the group hosted a fashion show with a clever twist. Instead of simply showcasing style, the event highlighted diverse career paths for women. Each look represented a different profession, opening eyes to the many directions a woman's career can take. It's playful, it's inspiring, and it sparks honest conversation about ambition and opportunity.

The group followed up with a session called "Life Hacks for the Working Woman." Here, team members swapped real strategies for balancing professional demands with personal life. The talk was candid and warm. Nobody pretended to have it all figured out. Instead, women shared what actually works for them—small habits, boundary-setting tips, and reminders to give themselves grace.

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The result is a community of women who feel supported in both their careers and their lives. They leave knowing they're not navigating the juggle alone.

One Mission, Three Powerful Voices

Look closely, and a single thread connects all three groups. Each one expands the circle of belonging in its own way. The BIPOC Affinity Group honors history and builds awareness. The YP Affinity Group extends kindness to residents who need it most. The Women in Leadership Affinity Group uplifts its members and celebrates their potential.

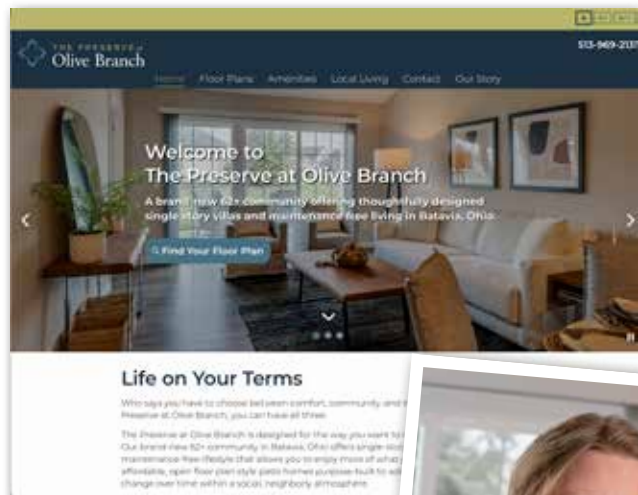
"You can only manage what you measure, and the same is true for culture," said Laura Lamb, ERS President and CEO. "Our affinity groups show what our values look like in practice—thoughtful, joyful, and deeply human. We're stronger together."

None of this happens by accident. It happens because ERS team members choose to lead with empathy and because the WCDB initiative, launched in 2020, provides them with the structure to act.

The work isn't finished. ERS knows there's always more to learn and more ground to cover. But the path forward is clear, and it runs straight through these three groups and the people who power them. Because everyone belongs here. Together, ERS is stronger. ■

Amanda in the Middle

By Megan Bradford



Community Manager Amanda Cline is helping shape a welcoming and connected community for future residents at the Preserve at Olive Branch.

Following the successful financial closings last fall, Episcopal Retirement Services (ERS) prioritized building a strong leadership team for the Preserve at Olive Branch by recruiting an experienced community manager. In late 2025, ERS welcomed Amanda Cline to the team. Amanda brings more than 10 years of experience managing and overseeing middle-market senior apartment communities, the majority in Clermont County.

Throughout her career, Amanda has built a reputation for delivering exceptional resident service, maintaining high occupancy levels, and fostering vibrant, welcoming communities where residents feel connected and supported. Amanda's local market knowledge, operational expertise, and resident-centered approach make her a great fit for the role as ERS prepares to welcome the first residents to the Preserve at Olive Branch in 2027. Amanda shared, "This area is filled with familiar faces, friends, neighbors, former residents, and local partners that I have been fortunate to know throughout my career, and I am excited to reconnect with so many of them in this new chapter."

Over the past several months, Amanda has worked closely with both the Ridge Stone and ERS teams

to prepare for each stage of the Preserve at Olive Branch's launch. Her efforts have focused on developing a comprehensive pre-leasing strategy, planning for a successful lease-up, and establishing the foundation for long-term community operations as the property's community manager.

Drawing on her experience opening and leasing new older adult communities, Amanda has also played a key role in developing the Preserve's new website, leasethepreserve.com. The site serves as a valuable resource for prospective residents and their families, showcasing detailed floor plans, community features, and information about the amenities and service coordination support that will be available.

"What excites me most is being able to offer something truly unique, an option that feels very different from traditional apartment or rental living. The design of the Preserve is intentional, and the quality shines through in every detail," Amanda said. "The comfort and space of a villa-style home create a much easier transition for someone who has spent years or even decades in a home of their own."

Recognizing that location is an important part of the resident experience, the website also highlights a dedicated "Local Living" section introducing prospective residents to nearby shopping, dining, healthcare providers, parks, walking trails, and other recreational and community destinations. This helps them envision the lifestyle and convenience the community will offer.

As construction continues to advance, Amanda's leadership and involvement in marketing, leasing, and operational planning are laying the groundwork for a successful community launch. Her early efforts to build awareness, develop leasing strategies, and establish strong resident engagement will help position the Preserve at Olive Branch for a successful lease-up. With a thoughtful, resident-centered approach guiding these preparations, the community is on track to welcome its first residents next year and establish itself as a vibrant, connected place for older adults to call home. ■



Well Being: A Holistic Model for Affordable Living

By Paige Davis



Through the ERS Well Being initiative, hundreds of residents build the support, skills, and connections they need to remain independent.

Well Being is a groundbreaking initiative designed to foster wellness, connection, and a stronger sense of belonging in Episcopal Retirement Services' (ERS') Affordable Living communities. More than a wellness program, it provides a framework that helps older adults thrive in every aspect of their lives.

The initiative is built on the belief that every older adult, regardless of income, should have the opportunity to live well. With guidance from trained staff, residents create personalized wellness plans that reflect their needs, strengths, and goals—whether they want to improve mobility, manage a health condition, explore a new interest, or reconnect socially.

Since its launch, Well Being has engaged hundreds of residents across nearly a dozen ERS communities, with participation offered at no cost.

Well Being is expanding to embrace a more holistic approach, recognizing that quality of life and long-term wellness are shaped by physical health, social connection, emotional support, financial stability, and other everyday factors.

Affordable Living Director of Resident Support, Dunisha Johnson, describes this distinction as the difference between lifespan and health span: lifespan is the number of years a person lives, while health span is the period of life spent mobile, independent, and healthy.

Supporting the whole person can also help Affordable Living communities thrive over time. When residents experience a greater health span, they may have fewer illnesses, fewer hospital visits, and a lower risk of falls—outcomes that benefit both residents and the communities that support them.

While wellness is often associated with physical ability, Well Being takes a broader view. The model incorporates eight dimensions of wellness: emotional, financial, physical, intellectual, occupational, social, environmental, and spiritual. Together, these dimensions help residents build the support, skills, and connections they need to remain in their homes and communities long-term.

Dunisha shares that wellness is reflected across many parts of community life, from service coordination and transportation to activities and resident education. Financial guidance, grief support, social connection, and community engagement all contribute to overall health.

Residents are also helping shape the future of the program. Through focus groups and ongoing feedback, they are identifying the kinds of support they want more of, including social opportunities, educational programming, resources for grief and loss, and ways to stay connected to the broader community.

Well Being is anchored by a research partnership with Xavier University's Center for Population Health, which measures impact and informs program strategy. This evidence-based approach helps ensure the initiative is effective and positioned for replication in communities nationwide. The research findings and model for Well Being will be shared at LeadingAge Ohio in August and the International Conference on Active Aging in November 2026.

"Well Being is helping redefine what affordable senior housing can be," said Dr. Jimmy Wilson, Vice President of Affordable Living. "We believe this work has the potential to create lasting change for older adults across the country." ■

Dear Friends,

Looking back on 2025, I am proud of what we have accomplished together—and deeply grateful for it. This was a year of real progress: lives improved, trust earned, and a mission advanced. At Episcopal Retirement Services (ERS), we hold firm to the belief that every older adult deserves to live with dignity, genuine connection, and joy. That conviction drives everything we do, and this past year, it showed.

One of our most significant milestones was the advancement of the Preserve at Olive Branch, our new middle-market senior apartment community in Clermont County. The need is real and growing. Too many older adults fall between two worlds—they do not qualify for subsidized housing, yet premium senior living is out of reach. These individuals deserve better choices, and ERS is stepping up to provide them. The Preserve was built with that population in mind: high-quality, thoughtfully planned senior living at a price point that reflects our commitment to serving older adults across the full economic continuum. With strong pre-leasing momentum and experienced leadership in place, we are well-positioned to welcome our first residents in 2027.

This year also marked a meaningful step forward in our care and service. Earning Certified Organization for Resident Engagement & Services (CORES) designation—a nationally recognized credential—affirms our rigorous commitment to our Affordable Living residents. Through our Center for Memory Support and Inclusion, the story of Dan Quible and families like his makes that work tangible. These are not programs on a page. They are real responses to real needs, delivered by a team that understands what is at stake.

We also made time to celebrate the relationships that make this work possible. Our Gatherings for Good gala brought together donors, partners, and friends who believe in this mission and back it with action—proof that the people around us are genuinely invested in what we are building together.

None of this happens without the people behind it. To our team members, who bring skill and genuine care to their work every day—thank you. To our donors, whose generosity makes possible what fees and subsidies alone cannot—thank you. To our residents, who trust us during one of life's most important transitions—thank you. And to our partners, who make this work stronger—thank you. Your investment in ERS means everything to us, and we do not take it lightly.

As I look ahead, I am confident in where we are headed. We are growing in the reach of our care and services, the strength of our team, and the depth of our impact. What we do at ERS matters—and because of you, we do it well.



With gratitude,

A handwritten signature in blue ink that reads "Laura R. P. Lamb". The signature is fluid and cursive.

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.

73,346

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

ERS Ministry Reaches Across the Tri-State in 2025



The Affordable Living by ERS and Middle Market communities

- | | | |
|--|--|--|
| A Canterbury Court | K Green Hills Affordable Living | S Maple Knoll Meadows |
| B Cambridge Heights | L Trent Village | T Madison Villa |
| C St. Paul Village (2)
St. Paul Village I & II | M Walnut Court | U New Carlisle Village (2)
Rachel Court, Sunrise Terrace |
| D St. Pius Place | N Central Parkway Place | W The Manse |
| E Shawnee Place | O Knowlton Place | X Scheper Ridge |
| F The Elberon | P Prairie Oaks Village (4)
Prairie View, Friendly Center,
Quaker & Mulberry Place | Y Woodburn Pointe |
| G Forest Square | Q Westminster Court (3)
Westminster Court I & II,
Esther Tuke | Z Pedretti Place |
| H Parkview Place | R Marlowe Court | a River's Edge |
| I Thomaston Woods | | b The Preserve at Olive Branch |
| J Thomaston Meadows | | |

2025 Overview and Financial Report

The financial information below is for the year ending December 31, 2025. This information is based on audited financial data compiled by the staff of Episcopal Retirement Services. Additionally, this information was confirmed via independent external audits with final reports for both 2023 and 2024 available upon request.

Condensed Balance Sheet

As of December 31, 2025

Assets	2025	2024
Current Assets	\$31,151,030	\$28,349,489
Investments and Reserves	\$44,545,513	\$40,370,794
Property and Equipment, Net	\$234,956,468	\$225,402,442
Beneficial Interest in Endowments	\$43,327,393	\$38,860,579
Other Assets	\$5,967,363	\$5,958,215
Total Assets	\$359,947,766	\$338,941,519

Liabilities	2025	2024
Current Liabilities	\$18,175,585	\$17,329,079
Entrance Fees	\$47,150,773	\$46,013,373
Long-Term Debt	\$87,285,141	\$85,039,334
Other Liabilities	\$459,211	\$328,741
Total Liabilities	\$153,070,710	\$148,710,527

Net Assets	2025	2024
Total Net Assets	\$206,877,056	\$190,230,992
Total Liabilities & Net Assets	\$359,947,766	\$338,941,519

Condensed Statement of Revenue and Expenses

For the year ending December 31, 2025

	2025	2024
Operating Revenue	\$69,587,266	\$65,822,074
Operating Expense	\$(80,670,127)	\$(75,398,990)
Net from Operations	\$(11,082,861)	\$(9,576,916)

	2025	2024
Non-Operating Revenue (Expense)	\$9,512,412	\$7,200,426
Total Net Loss	\$(1,570,449)	\$(2,376,490)

\$3,779,763

2025 Contributions and Commitments

\$993,153

Good Samaritan Mission Gifts and Grants

\$752,000

Realized Planned Gifts in 2025

\$2,034,610

Gifts for Capital Needs and New Initiatives

The Good Samaritan Mission Fund

\$2.82 Million

Total Ministry Costs

\$1.15M

Resident Financial Aid

\$1.32M

Affordable Living by ERS

\$272,037

Spiritual Care

\$75,089

The Staff Assistance Fund

\$36,192

Tuition Assistance

\$17,052

Volunteer Coordinators

\$21,550

Community Outreach programs

\$4,605

Partners In Care Fund

Ministry for residents or through ongoing support

5,892

People served as residents or through ongoing support

1,913

Affordable Living Residents

704

Deupree Meals On Wheels Participants

144

Skilled Nursing Care Residents

419

Independent Living Residents

81

Assisted Living Residents

152

Middle Market Residents

86

Living Well Senior Solutions Clients

676

Swipe 'N' Dine Participants

1,573

Student Educational Experiences

Ministry through community outreach

66,484

Number of contacts by people seeking information/education

44,633

Linkage Online Blog Views

1,043

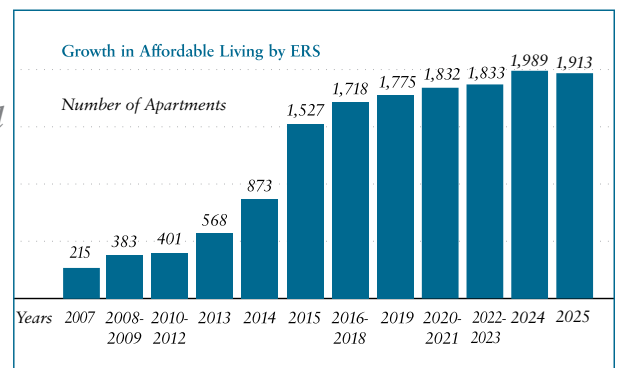
Website Resources Accessed

3,406

ERS Center for Memory Support & Inclusion Contacts

4,547

Community Outreach Education Contacts



Giving Thanks Together

By Jonathan Fissel



Walnut Court residents enjoy “Holiday Dinners in a Bag,” donated and organized by ERS team members during the Thanksgiving season.

The holiday season is a reminder that meaningful moments are made through connection, compassion, and community. This past Thanksgiving, Episcopal Retirement Services’ (ERS’) person-centered mission came to life as team members did their part to serve older adults in Affordable Living communities, helping residents to feel seen, valued, and surrounded by the spirit of the season.

Affordable Living Administrative Assistant Lo’Rain Drais led the charge, organizing the Thanksgiving Food Drive at the support services office. Their team members worked to pack “Holiday Dinners in a Bag,” which includes all the ingredients needed to prepare a festive holiday dinner. The packages contained stuffing, canned turkey or chicken, gravy, mashed potatoes, green beans, and fruit.

“Thanksgiving is a time for gathering and gratitude, and we wanted to support residents by helping ease some of the financial pressures that can come with preparing a holiday meal,” Lo’Rain said.



“By collecting these kits, we were able to provide practical support while sharing the spirit of the season.”

There were several ways for team members to make their donations. People could donate fully prepared bags, or individual items, ingredients, cash, or gift cards. No matter how small, each contribution was an important step toward empowering residents to focus on the joy that the holidays can bring. By the end of the drive, the results surpassed all expectations.

Support office team members donated nearly \$300—enough to buy 30 meal kits for residents in Walnut Court. Team members also donated nearly two dozen kits for residents of Woodburn Pointe.

Every bag represented care for one’s neighbors and co-workers’ unity for the sake of serving older adults and families. These meals not only helped residents reduce their expenses but also enabled them to celebrate Thanksgiving with dignity and comfort.

“Going into the drive, our goal was to collect 30 meal kits for Walnut Court. When we realized our support office employees had not only met the goal but doubled it, I was truly elated,” Lo’Rain said. “Seeing that level of support demonstrated how much our team cares about the residents we serve and the impact we can make when we come together around a shared purpose.”

This year’s food drive once again showed why ERS is so unique. Whenever action is necessary, the team acts generously and with great compassion. ■

Building Communities of Care:

Affordable Living Earns National Recognitions for Resident Services

By Paige Davis

At Episcopal Retirement Services (ERS), affordable housing is about more than providing a place to live. It's about helping older adults remain independent, connected, and supported as they age. That commitment recently earned ERS' Affordable Living the Certified Organization for Resident Engagement & Services (CORES) designation, a national recognition for excellence in resident services coordination for affordable senior housing.

The CORES Certification recognizes organizations that provide high-quality resident services through strong operations, thoughtful planning, and a commitment to continuous improvement. ERS earned the designation for all 32 of its Affordable Living communities, reflecting the organization's dedication to supporting the whole person, not just providing housing.

"This milestone achievement affirms our profound commitment to a person-centered approach—where providing a safe, affordable home for older adults is only the beginning."

Jimmy Wilson, Vice pPresident of Affordable Living

"Our team builds meaningful relationships and connects residents with the resources they need to live with dignity, independence, and purpose. Our communities are more than housing—they are places where older adults can thrive," Jimmy said.

That support takes many forms. Affordable Living team members help residents connect with healthcare providers, transportation, food resources, benefits, wellness programs, and other community services. They also create opportunities for residents to build friendships, stay active, and remain engaged. By helping meet both everyday needs and long-term goals, the team gives older adults the support they need to continue living independently.

The certification process did more than recognize the work already happening across Affordable Living communities. It helped strengthen the program for the future. As part of the process, the team developed new ways to gather resident feedback and evaluate programs, ensuring activities and services continue to reflect what



From gardening, to exercise and community events, Affordable Living communities provide activities and programming that help residents thrive.

residents find most meaningful. Those improvements will help guide future decisions and enhance the resident experience.

"The CORES certification isn't just a badge of honor—it affirms that we are delivering the programs and services our residents genuinely need and value," said Dunisha Johnson, Affordable Living Director of Resident Support. "We listen to resident feedback and continuously strengthen the services that help them age in place, benefit from social engagement, and feel seen and supported."

For Dunisha, who led the certification effort, the project also strengthened Affordable Living itself. The process created new ways to evaluate services, reinforced what worked best in the communities, and better positioned ERS for future opportunities. More importantly, it established a stronger foundation for meeting residents' changing needs in the years ahead.

ERS is now one of only 96 organizations nationwide to earn CORES Certification. More than a national recognition, the designation reflects the work happening every day across ERS. It recognizes the team members who build trusted relationships, connect residents with meaningful resources, and create communities where older adults can live with independence, purpose, and a true sense of belonging. ■

A Connection Through Care

A Shared Passion for Nursing Sparked a Meaningful Connection

By Caroline Puryear



Deupree House resident Nancy Finklemeier inspires dining room server Sarah Turner to pursue her dreams in nursing.

Relationships between residents and team members are about more than providing care and services. They create opportunities to learn from one another, share experiences, and build connections that leave a lasting impact on both lives.

That is exactly what happened at Deupree House, where an unexpected connection between dining room server Sarah Turner and resident Nancy Finklemeier grew from a shared passion for nursing. Knowing Sarah was entering nursing school, Dining Services Director Pete Juszcyk introduced her to Nancy one night before dinner, believing the two would have a lot in common.

They discovered a shared interest in acute cardiac care and a curiosity about the future of nursing. Nancy took an interest in Sarah's studies and goals, while Sarah found inspiration in Nancy's decades of experience in healthcare.

"She really made me feel comfortable and excited to discuss nursing and the field of healthcare with her," Sarah said. "She is excited for me as I continue my nursing school journey and has made me feel confident that I can achieve great things as she did in her career."

For Nancy, the connection reflected something larger about ERS itself.

"It really shows what a wonderful organization this is," Nancy said. "It reflects a key value in management, helping employees grow in their careers and explore interests beyond their day-to-day job descriptions."

That intentional approach created space for a relationship that might not have otherwise happened, one that changed both their lives for the better.

One story Nancy shared especially stayed with Sarah. Nancy told her about developing a device that helped physicians better understand why patients were fainting, allowing episodes to be evaluated without patients needing to come in each time. That innovation eventually grew into a successful healthcare business.

For Sarah, hearing that story reshaped how she thinks about her future in nursing.

"I have learned from her that if you have an interest or desire to fix or improve something regarding healthcare as a nurse, do it," Sarah said. "Nurses know the patients more than anyone else in a hospital. They have the capability to develop the future of healthcare."

Their connection is a reminder that relationships between residents and team members can spark meaningful growth in unexpected ways. Nancy's encouragement and stories have given Sarah a deeper sense of direction and confidence as she begins her nursing journey. For Sarah, each conversation has become more than part of a workday—it's an opportunity to learn, grow, and carry those lessons forward into her future in nursing. ■

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

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Donor Profile:

Dan Quible Pays Forward the Lifeline He Found with CMSI

By Joy Blang

When Dan and Amy Quible envisioned retirement, they imagined enjoying the rewards of a life built together over nearly four decades of marriage. What they did not anticipate was the profound challenge that would reshape their future.

After several years of subtle but concerning changes in memory and daily functioning, Amy was diagnosed with vascular dementia and Alzheimer's disease at the age of 63.

As her condition progressed, the family found themselves navigating an unfamiliar and overwhelming path. Fortunately, they did not have to walk that journey alone.

Dan credits the ERS Center for Memory Support and Inclusion (CMSI) with providing critical support, guidance, and hope during one of the most difficult periods of their lives.

One of Amy's greatest joys has always been staying active and engaged. As her memory changed, Dan worried about how he would provide meaningful opportunities for her. CMSI helped make that possible through partnerships



with local arts, cultural, and nature organizations offering dementia-inclusive programming. Together, Dan



and Amy found friendship, purpose, and enjoyment through programs at the Civic Garden Center, Cincinnati Zoo, American Sign Museum, Cincinnati Ballet, and Cincinnati Art Museum.

"To know Amy is to know her happy smile," Dan shared.

"I am forever grateful for the many smiles brought to her face on the days we participated in these programs."

Equally important was the support Dan received as a care partner, finding

connections with others facing similar challenges and encouragement from professionals who understood the realities of being a caregiver. Dan describes the CMSI team as a lifeline. The compassion and dedication shown by team members and the many community partners who make these programs possible helped lighten the burden for the entire family.

Dan was so grateful for the support, encouragement, and friendships he found through CMSI that he decided to make a significant charitable gift to help ensure other families facing memory loss can access the same compassionate care and life-changing resources that meant so much to him and Amy. ■

To learn more about how you can make an impact, call Executive Director of Philanthropy Joy Blang at 513.979.2313. Visit erslife.info/donate to make a gift.



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