



Summer 2025

Linkage

INSIDE: 2024 ANNUAL REPORT



**TOP
WORK
PLACES
2025**

Cincinnati.com

The Enquirer

ERS

Episcopal Retirement Services

ERS Soars to New Heights

Our latest satisfaction survey results
reveal the power of connection,
care, and community across ERS.

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ON THE COVER

Episcopal Retirement Services residents and team members: Becky Burns, Michael Williams, Sonya Housley, Virginia Cox, Emerson Stambaugh, and Sandy Bailey. 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

Albert Smitherman, Chair

Dora Anim, Gay Bain, Alex Campbell, Patti Dunham, The Rev. Darren Elin - Bishop's Representative, The Rev. John Fritschner, Alan Hartman, Crystal Holliday, Noel Horne, Eric Kearney, The Rev. John F. Koepke, III, Gerron McKnight, Jennifer Payne, Apryl Pope, Thomas Regan, Michael Williams, William Woods, Chip Workman

ERS Foundation Board of Directors

JoAnn Hagopian, Chair

Jon B. Boss - Trustee Representative, Anthony Bruns, W. Thomas Cooper, Laura R.P. Lamb, 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.

We Welcome Your Comments

The Linkage Editor

Episcopal Retirement Services

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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. 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





Episcopal Retirement Services Celebrates 16 Years in a Row as a Top Workplace

By Jonathan Fissel



Team members across ERS, from Affordable Living and Support Services to the Deupree House Dining team, are all smiles as they celebrate receiving the Top Workplace award once again.

Episcopal Retirement Services (ERS) is delighted to receive recognition as a Top Workplace from The Cincinnati Enquirer for the 16th straight year. This honor belongs entirely to our incredible team members. Their passion, innovation, and dedication have made us the region's only senior living organization to be recognized every year since the award's inception.

What Makes This Recognition So Meaningful?

The Top Workplace honor is based entirely on feedback from our team members through an anonymous survey measuring nearly 30 key culture drivers—purpose, leadership, communication, appreciation, and direction. Our team members' responses speak volumes about the culture we've built together.

ERS is the only senior living organization—and one of only two

businesses in Greater Cincinnati—that has received this award every single year since its inception. Sweet sixteen isn't just a milestone—it's a reflection of our team's deep sense of purpose, and a celebration of the extraordinary people who make ERS a great place to work and live.

To Our Team Members

Thank you for making ERS an extraordinary place to work and live! Your person-centered commitment drives our culture of excellence, ensuring that older adults receive the compassionate care, services, and support they deserve. Because of your dedication, ERS has been recognized as a Top Workplace for the 16th consecutive year—a testament to the high-quality care and meaningful community we've built throughout Cincinnati and the Tri-State region.



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.



Noel Horne

*Alternate Representative Board Member,
Deupree House Resident*

What is your professional background?

Finance executive with P&G. I joined in England in 1963, with assignments in Italy and Japan before relocating permanently to Cincinnati in 1979.

How long have you been affiliated with ERS?

About 26 years. I've volunteered on the Finance Committee, chaired it, and served nine years on the Board.

Why do you volunteer with the ERS Board?

My time with ERS has been very rewarding. I value learning about senior living and working with dedicated staff and volunteers.

How long have you lived at Deupree House?

My wife, Angela, and I moved to Deupree in September 2022.



Alex Campbell

ERS Board Member

Occupation? Senior Vice President, Director of Private and Professional Banking

How long have you been with ERS?

I've been an ERS Board member since 2024.

Why do you volunteer on the Board?

My family has trusted ERS' Episcopal Church Home with the care of our loved ones—both my father and maternal grandmother were residents. My family received the care needed during incredibly difficult times. As part of the Diocese of Kentucky, I also serve on the Diocesan Investment Committee and the Bishop Dudley Memorial Trust Investment Committee.

Most rewarding part?

Supporting the mission of ERS and helping to ensure its sustainability for generations to come.

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.

ERS. Gatherings for Good

The Gatherings for Good Gala Series offers intimate events where guests connect in unique settings while gaining insight into how ERS empowers older adults through creative, purposeful engagement.

Longtime friends Liz and Steve Sudberry, who support ERS both personally and as a sponsor through in-home care provider TheKey, explain, “We truly value attending events, as they provide meaningful opportunities to connect with others who share our passion for serving older adults. Each experience allows us to learn and grow and strengthens our commitment to this important work, leaving us inspired and proud to be associated with ERS.”

Two events remain in the 2025 gala series:



The Chicago Story—Friday, Sept. 12

Frank Sinatra may have crooned, “Chicago is my kind of town,” but Cincinnatians know much of what makes that metropolis special can be found right here at home. Perched atop Mount Adams, sophisticated and modern venue, The View, delivers a cosmopolitan experience with breathtaking skyline and waterfront views.

Chicago’s famed Second City has launched incredible talent—including our headliner, Cincinnati’s own Joe Boyd. In his one-man show, “At



Least It Wasn’t Boring: Confessions of a Man in Search of His Purpose,” Joe shares humorous and heartfelt stories from his winding career as an actor, producer, pastor, teacher, poker player, and failed Las Vegas wedding officiant—reminding us that we’re all on a journey to find our true selves. Adding to the evening, Jane Novak-Cook will share her own Chicago story, recounting how ERS staff bridged these two great cities to support her family in a time of need.

Cincinnati—It’s our kind of town!



Lee Social Club—Friday, Oct. 24

During the golden age, supper clubs were the height of style—where guests enjoyed cocktails, fine dining, and lively entertainment. Recently restored to its 1940s grandeur, the 20th Century Theater remains a beloved local icon, once likely frequented by Marjorie and Charles Lee.

Gala guests will step back in time for an evening of elegance, headlined by Daven Roberson, whose performances bring to life the stories of older adults he performs for and with across ERS. Whether at Jeff Ruby’s, a gala, or an ERS community, Daven’s true gift is his ability to personally connect with every audience member. As the founder of Soul Music for Seniors, he uses music to uplift spirits, promote well-being, and build community. ■

To learn more, and register to attend, visit erslife.info/gala.



ERS Communities Soar to New Heights of Satisfaction

By Laura Lamb



From residents to leadership, meaningful relationships are at the heart of ERS—as shown by Marjorie P. Lee resident and ERS Board Member Michael Williams, Deupree House resident Virginia Cox, and ERS President and CEO Laura Lamb.

At Episcopal Retirement Services (ERS), resident satisfaction has hit an unprecedented high, reflecting the enduring excellence of our retirement communities and the strong bonds between residents and team members. This milestone was achieved through the results of a voluntary satisfaction survey conducted by the independent survey company, Holleran, in late 2024.

The annual survey offered a comprehensive view of resident experiences and benchmarked ERS communities against 350 similar retirement organizations in 34 states. Holleran's database includes over 120,000 resident surveys, providing ERS with credible insights and context to continually improve. For Deupree House, Episcopal Church Home (ECH), and Marjorie P. Lee, the results were nothing short of exceptional.

Residents Speak to a Culture of Growth and Engagement

According to the survey, overall resident satisfac-

tion and willingness to recommend their community to others are key measures of engagement and success. Impressively, 97.9% of Deupree House residents rated their overall satisfaction as “good” or “very good.” This score placed Deupree House in the 96th percentile nationally in Holleran's benchmarks.

Virginia Cox, a proud Deupree House resident, wasn't surprised by such glowing results. “Deupree is a place where residents don't age; they grow,” she remarked. “When you live in a community that embraces this as a way of life, residents stay curious, seize opportunities, and pursue new experiences. That's what makes us so happy here.”

Marjorie P. Lee also received outstanding reviews from its residents, particularly for long-term confidence in the organization's strength and direction. “It came as no surprise to me that residents gave high marks to their confidence in ERS' long-term commitment to providing the safe, healthy, and affordable hospitality we all value so highly,” said Michael Williams, a Marjorie P. Lee resident and resident

representative on the ERS Board. “The ‘continuing care’ model gives residents total confidence that they will always be looked after and treated with dignity and respect.”

At Episcopal Church Home, meaningful relationships emerged as the highest-ranked factor in resident satisfaction. Residents pointed to the care and dedication of team members as a defining feature of life at their community. Sandy Bailey, a Dudley Square resident at ECH, shared, “From the first moment of inquiry, through each day as a resident, the team members have extended genuine and meaningful interest in my well-being. Whether I encounter a team member on a casual walk around the campus or seek information regarding events, procedures, or maintenance requests, I am treated with utmost courtesy, respect, and friendliness.”

A Shared Mission Between Residents and Team Members

The remarkable satisfaction levels across all ERS communities aren’t solely attributed to their residents; they are a shared achievement between residents and the dedicated team members who serve them. ERS leaders emphasized the interplay between resident well-being and employee satisfaction as integral to the communities’ success.

“To have a great place to live, first you have to have a great place to work,” said Joan Wetzel, vice president of human resources. “Our team members’ passion and commitment truly foster the kind of environment where residents can thrive.”



Becky Burns, ECH administrative assistant; Sandy Bailey, ECH Dudley Square resident; and Sonya Housley, resident assistant at Marjorie P. Lee, come together to celebrate the strong resident-staff connections that make ERS a great place to live and work.

ERS Executive Director of Hospitality Services Emerson Stambaugh echoed Joan’s sentiment.

“Many organizations think about this in reverse,” Emerson noted. “At ERS, we understand that it’s our engaged and satisfied team members who create an exceptional living environment for our residents. That philosophy is reflected in the high marks we’ve received in this survey.”

Sonya Housley, resident assistant at Marjorie Lee, and Becky Burns, administrative assistant at ECH, couldn’t agree more. Sonya is celebrating her seventeenth work anniversary this month and shares, “I love working here. The residents and my teammates make it a great place.”

Accolades Extend Beyond Survey Results

The Holleran survey wasn’t the only source recognizing the excellence at ERS communities. Deupree House and Marjorie Lee were the only communities that received the distinguished National Ratings from U.S. News & World Report for both Best Independent Living and Best Continuing Care Retirement Communities in Greater Cincinnati.

These additional honors validate what residents and staff alike already know—that ERS has cultivated well-respected, thriving communities that balance independence, care, and camaraderie.

Looking Ahead

With high participation rates providing reliable and representative data, the Holleran survey results underscore that ERS communities are not merely places to live, but places to thrive. They are vibrant and engaged communities where every resident can grow and connect.

“It’s the collective effort of our residents and team members that has led us here,” said Emerson. “We are proud of the communities we’ve created together and are committed to maintaining this momentum, continually striving for even greater satisfaction.”

Whether you’re a resident, team member, or family of a current resident, this success speaks to the heart of the ERS mission—to enrich the lives of those we serve. The high satisfaction isn’t just a statistic; it’s the culmination of shared values, partnerships, and a relentless focus on what matters most. ■

Enhancing Living Through Community Building & Service Coordination

By Megan Bradford



Service Coordinator Ann Miller helps connect River's Edge residents—like Mary Beth (L) and Dennis Bialecki (R)—to essential services such as transportation and grocery delivery, as well as social activities and events.

ERS collaborated with Ridge Stone Builders, a long-standing partner, to pilot their own Service Coordinator model in River's Edge, a Middle Market community in Perrysburg, Ohio. Ann Miller serves as a service coordinator, connecting residents to various essential and vetted services as needed—including home healthcare, housekeeping, laundry, dry cleaning pickup and delivery, grocery and pharmacy delivery, transportation, and more. The Service Coordinator model has greatly enhanced residents' ability to age in place.

Over time, the residents at River's Edge have created a tight-knit community. Like many of their neighbors, Mary Beth and Dennis Bialecki moved to River's Edge from Wisconsin when they retired to live closer to their daughters and their families. "River's Edge is a warm, welcoming community where neighbors are friendly and care about each other. When a resident has a health issue, fellow neighbors come together to support them by providing meals and watering their

flowers," Mary Beth shared. Residents lend their talents, too. "When birds were getting into house exhaust fan vents to build nests, a fellow resident designed special screens to keep the birds out of the vents, and he and I worked together to install them for the neighborhood," Dennis added.

Fostering engagement and neighborhood relationships is a critical component of the aging-in-place model to succeed within a community. Ann coordinates various life enrichment opportunities each month in the River's Edge Clubhouse. Mary Beth shared, "Not only does she have a wealth of information that residents need to support in coordinating in-home services, but she also creates activities for us to enjoy with our neighbors. She even offers fun activities like front porch decorating contests, live music, and an annual end-of-the-summer block party."

The success of River's Edge highlights the importance of fostering engagement and relationships in a senior living community. Laura Lamb, ERS' president and CEO, praised the Service Coordinator model, stating, "We are confident that the model will continue to provide a tremendous benefit to the River's Edge residents and future ERS Middle Market communities. When neighbors and team members become friends, caring about one another, looking out for one another, we can live in community longer."

Mary Beth underscored Ann's value, saying, "We are blessed to have Ann sharing her time and talents. She enables us to enjoy life here at River's Edge fully."

Through its investment in innovations like the Service Coordinator model, ERS demonstrates its dedication to enhancing the quality of life for seniors, ensuring that communities are both inclusive and enriching. ■

“Well Being” Phase 2: Expanding Wellness for Older Adults in Affordable Living

By Paige Atkison & Jonathan Fissel



Through the ERS Well Being initiative, residents like Bernice at St. Paul Village benefit from personalized support and regular fitness sessions with team members like Wes Bogard.

one new community each year through 2031. This next phase will ensure full-time staffing and data-informed strategies to help residents live longer, healthier, and more connected lives.

“This is a pivotal moment,” said Jimmy Wilson, vice president of Affordable Living. “Well Being goes beyond providing activities—it’s about creating an atmosphere of wellness where older adults feel seen, supported, and empowered.” Led by a dedicated team, including Well Being Manager Wes Bogard, who joined ERS in early 2024, the initiative now delivers experiences tailored to residents’ unique goals and challenges. The programs are designed by partnering with individual residents to meet their specific needs and preferences.

Through collaborations with ERS departments and community partners, the Well Being team offers a range of opportunities for residents, from personal training and educational sessions, to shared community meals. These activities foster daily connection, helping to combat the growing public health crisis of social isolation—a concern the U.S. Surgeon General has warned is as harmful as smoking 15 cigarettes a day.

The success of the Well Being initiative is measured in partnership with Xavier University’s Center for Population Health to help guide future growth. Early data shows encouraging trends: decreased loneliness, improved mobility, and enhanced emotional well-being. Since its inception, the program has engaged more than 200 residents, and participation continues to grow.

The long-term vision is to establish a gold standard in senior housing—one that places well-being at its core and can be replicated in communities throughout America. This work is transforming residents’ quality of life and creating connected and healthy communities. ■

Older adults living in Episcopal Retirement Services’ Affordable Living communities are now experiencing a new chapter in whole-person wellness. As part of our Well Being initiative, expanded programming will now reach more residents through the initiative’s second phase—bringing more resources, deeper engagement, and a broader reach.

Launched in 2022, Well Being is designed to support older adults with limited financial means by offering free, personalized experiences that nurture physical, emotional, and social wellness. Phase 2 builds on a successful pilot and initial rollout in 11 communities. ERS plans to expand the program to

Dear Friends,

2024 was a year of powerful momentum for Episcopal Retirement Services. We advanced our mission with energy and purpose. From strong occupancy growth and national recognition to expanding wellness and deepening impact, the year reflects the commitment of our team and the trust of those we serve. Our Annual Report for 2024 highlights not just financial performance but also how we continue to enrich lives through innovation and compassion. Thanks to our dedicated staff, generous donors, and strategic partners, we didn't just sustain our work—we elevated it.

- **Outstanding occupancy trends:** In 2024, our Continuing Care Retirement Communities welcomed many new residents, reaching their occupancy goals. Even though our marketing team was in transition, they were laser-focused and lockstep with our sales team. Their collaboration, along with the creativity of our maintenance and long-term partners, Ridge Stone, significantly reduced the time to renovate our apartments at Deupree House and Marjorie P. Lee. Combined, their efforts enabled us to rebound to pre-COVID rates by early 2025.
- **Stellar resident experience merits national recognition:** In late 2024, an independent survey by Holleran revealed unprecedented satisfaction across Deupree House, Episcopal Church Home, and Marjorie P. Lee. The results confirmed what we've long known—ERS communities are thriving environments where residents feel valued, connected, and supported. This success stems from the strong bond between residents and the dedicated team members who serve them. Adding to the achievement, Deupree House and Marjorie P. Lee received national honors from U.S. News & World Report..
- **Transformative investment in wellness:** Our Well-Being program, a holistic wellness initiative for residents of Affordable Living, continued to grow and expand. In 2024, the program now serves all 11 Cincinnati-region communities and is positioned to reach all 20 plus ERS communities by 2031. Thanks to our generous donors and our partnership with Xavier University, all services are provided at no cost to residents.
- **Support beyond our walls:** Our Center for Memory Support and Inclusion reached more individuals living with cognitive loss through its Songs In Mind music program, offered in partnership with Keys for Success. Deupree Meals on Wheels' Swipe 'N' Dine initiative expanded access to nutritious meals by partnering with local restaurants, offering older adults not just sustenance of a meal, but connection, companionship, and joy.

At ERS, we remain committed to ensuring that all older adults—regardless of income or ability—can live with purpose and meaning. I am deeply grateful to our residents, team members, donors, and community partners for the vital role they all play in advancing our mission.



With gratitude,

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.

57,375

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

ERS Ministry Reaches Across the Tri-State



*Parish Health Ministry is on temporary hiatus.
**Esther Tukes Managed

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)
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, Prairie Gardens
Friendly Center & 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 | |
| I Thomaston Woods | | |
| J Thomaston Meadows | | |

2024 Overview and Financial Report

The financial information below is for the year ending December 31, 2024. This financial 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, 2024

Assets	2024	2023
Current Assets	\$28,349,489	\$25,304,225
Investments and Reserves	\$40,370,794	\$38,608,039
Property and Equipment, Net	\$225,402,442	\$233,381,376
Beneficial Interest in Endowments	\$38,860,579	\$35,559,658
Other Assets	\$5,958,215	\$5,734,437
Total Assets	\$338,941,519	\$338,587,735

Liabilities	2024	2023
Current Liabilities	\$17,329,079	\$16,834,159
Entrance Fees	\$46,013,373	\$41,151,224
Long-Term Debt	\$85,039,334	\$92,752,670
Other Liabilities	\$328,741	\$290,023
Total Liabilities	\$148,710,527	\$151,028,076

Net Assets	2024	2023
Total Net Assets	\$190,230,992	\$187,559,659
Total Liabilities & Net Assets	\$338,941,519	\$338,587,735

Condensed Statement of Revenue and Expenses

For the year ending December 31, 2024

	2024	2023
Operating Revenue	\$65,822,074	\$57,697,480
Operating Expense	\$(75,398,990)	\$(72,440,059)
Net from Operations	\$(9,576,916)	\$(14,742,579)

	2024	2023
Non-Operating Revenue (Expense)	\$7,200,426	\$8,791,748
Total Net Loss	\$(2,376,490)	\$(5,950,831)

\$1,882,025

2024 Contributions and Commitments

\$1,053,736

Good Samaritan Mission Gifts and Grants

\$297,252

Realized Planned Gifts in 2024

\$531,037

Capital Gifts and New Programs

The Good Samaritan Mission Fund

\$2.69 Million

Total Ministry Costs

\$1M

Resident Financial Aid

\$1.24M

Affordable Living by ERS

\$276,159

Spiritual Care

\$78,053

The Staff Assistance Fund

\$66,060

Tuition Assistance

\$33,652

Volunteer Coordinators

\$22,250

Community Outreach programs

\$2,351

Partners In Care Fund

Ministry for residents or through ongoing support

4,506

People served as residents or through ongoing support

1,989

Affordable Living Residents

532

Deupree Meals On Wheels Participants

192

Skilled Nursing Care Residents

390

Independent Living Residents

89

Assisted Living Residents

165

Middle Market Residents

70

Living Well Senior Solutions Clients

735

Swipe 'N' Dine Participants

56

Student Educational Experiences

Ministry through community outreach

52,869

Number of contacts by people seeking information/education

30,149

Linkage Online Blog Views

504

Website Resources Accessed

2,804

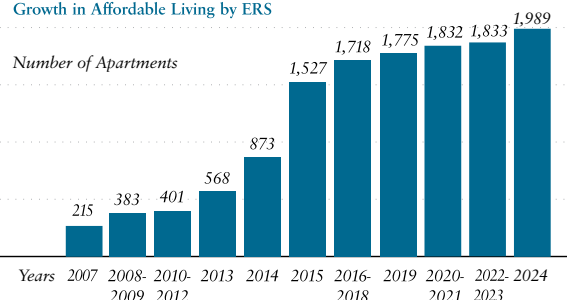
ERS Center for Memory Support & Inclusion Contacts

4,147

Community Outreach Education Contacts

Growth in Affordable Living by ERS

Number of Apartments



Living Well Senior Solutions: A Support System Like Family

By Sophie Gangi



To Deupree House residents Marv Collins (L) and Dean Colville (R), Living Well Senior Solutions Care Manager Margaret Sexton isn't just staff—she's like family.

Marv and Dean moved to Deupree House in 2019. Not only did they gain a community of like-minded seniors, but also a team of staff who feel like family. At first, they didn't need much support, but over time, things changed. "We were always independent, and for a long time, we didn't need much help," Marv explained. "But as time has gone on, we've realized how valuable it is to have a community around us."

Bridging the Gap

For seniors like Marv and Dean, independence is important—but so is peace of mind. That's where Living Well Senior Solutions (LWSS) makes a difference. This team provides personalized care, ensuring that retirees and their loved ones feel supported throughout their aging journey.

Residents in retirement communities like Deupree House and older adults in the broader community can get support from LWSS care managers. As Dean put it, "The best thing that's happened to us in the last five years is Margaret," their LWSS care manager. Whether accompanying them to appointments, managing medications, or simply being a trusted advocate, the LWSS team

ensures seniors like Marv and Dean have everything they need to thrive.

Margaret explains that Marv and Dean often joke that no one tells you how hard aging can be. But it's true—an unexpected health issue, or even a small shift in daily abilities, can quickly create stress for seniors and their loved ones.

LWSS bridges that gap with expert guidance, personalized care, and support during life's transitions. "We don't ever want someone to feel that they're on this aging journey by themselves," she explained.

A Family Larger by One

For Marv and Dean, Margaret has become an essential part of their life.

"Margaret has been a godsend," said Marv. She helps them with doctor appointments, planning ahead, and navigating things they

never imagined needing help with. This support can take many forms—whether it's providing options for aging in place at home, promoting wellness, or, when appropriate, assisting with the transition to a continuing care retirement community.

Finding Comfort and Peace of Mind



"We were planners," Dean said, reflecting on their decision to move to Deupree. "When we did start needing more support, we had it—without stress, without scrambling."

Margaret is one of many LWSS care managers dedicated to helping older adults maintain independence while making life easier. The LWSS team brings a deep sense of compassion and trust that feels like family.

Looking back, Marv added, "The truth is, we don't have family nearby, but we don't feel alone here. We have each other, and we have an incredible support system. That's family." ■

More Than a Meal: How Swipe 'N' Dine Fights Senior Isolation

By Joy Blang

"I was just a guy with a can of tuna," Henry said of his life just a year ago. Steve admits, "Some days I never left the house or even got out of my pajamas." And Janet, 94, legally blind, homebound, and widowed, had lost connection to everyone but a few close family members. They're not alone. In 2023, the U.S. Surgeon General declared loneliness and social isolation a public health crisis—its impact likened to smoking 15 cigarettes a day.

That's where Swipe 'N' Dine, a new Episcopal Retirement Services (ERS) initiative within the Deupree Meals On Wheels (MOW) program, comes in. ERS Vice President of Middle Market and Ministry, Megan Bradford, explains: "While Meals On Wheels delivers essential nutrition to vulnerable, homebound older adults, Swipe 'N' Dine serves a different purpose—one rooted in connection and belonging. Many older adults today are lonelier than ever. They need more than just a meal—they need a reason to show up." A good meal might draw them in, but it's the friendships, purpose, and joy that keep them coming back.

Swipe 'N' Dine (SND) reimagines the senior center model and experience. Instead of gathering in a single location, participants use a special meal card to "swipe" at partnering restaurants across the community. Menus are crafted to meet Council on Aging nutritional standards, and the model offers choice, flexibility, and dignity. For Edna, a beloved family matriarch, it's a welcome change. "It's so nice to share a good meal with others—without spending hours in the kitchen."

SND is more than a meal—it's a way to build community. ERS staff partner with local restaurants, caterers, and community spaces to host "pop-up" dining events. These events create vibrant, inclusive experiences where many come alone or with a plus one, but leave with new friendships. Familiar venues like Artsville in Madisonville and the Deer Park Library have become cherished weekly gathering spots. To meet growing demand, ERS has launched a campaign to raise up to \$1 million to expand Swipe 'N' Dine's reach. "Our goal is to serve more people, offer more meals each month, and provide expanded programming that truly enhances quality of life," says MOW Director Tsippy Gottlieb. In just one year, the program has grown from 350 participants to a projected 800 by early fall.

Thanks to Swipe 'N' Dine, participants like Steve now have a reason to get up, get dressed, and meet with friends every Wednesday. Janet's daughter Lynne now includes SND visits in her weekly errands, knowing it's the highlight of her mother's week. "I love the chatter, the food, and just getting out of the house," Janet says. As for Henry, he still enjoys a tuna sandwich now and then—but he looks forward to lunch at The Kinneret Grill, a partner restaurant, where he met Sam, a fellow veteran. "This program didn't just fill my plate—it filled my heart," he says.

Learn more and support this important campaign at erslife.info/snd. ■



Lynne (L) and her mother, Janet (R), enjoy time together with others at SND.



Since her husband's passing, Edna (R) has found meaningful connections at SND.



Kinneret Grill and other local businesses are partnering with Swipe 'N' Dine.

Purpose in Action: How CMSI is Changing the Dementia Support Landscape

By Caroline Puryear

In 2024, Episcopal Retirement Services' Center for Memory Support and Inclusion (CMSI) continued its mission to foster a more compassionate and inclusive community for individuals living with dementia and their care partners. Guided by Director Shannon Braun, the Center expanded its reach through new partnerships, innovative programming, and the addition of Program Coordinator Sarah Shaffer.



CMSI Director Shannon Braun and Program Coordinator Sarah Shaffer collaborate with community partners to expand access to education, resources, and programs for caregivers and individuals living with dementia.

Sarah, who also serves ERS as a Living Well Senior Solutions Care Concierge, supports CMSI by assisting with registration, engagement, and community-building efforts. She brings both professional expertise and personal caregiving experience to her role—qualities that have established her as a compassionate and trusted presence in the lives of many families. “What excites me most about my role is being part of something that truly makes an impact,” Sarah shared. “This work is personal and purposeful. I’m genuinely grateful every day for the connections and bonds I’ve formed with our participants and partners.”

Highlights from the year included two new community partnerships that introduced dynamic and meaningful programming for CMSI participants. Through a collaboration with La Soupe, attendees engaged in hands-on culinary sessions that promoted brain health while helping caregivers gain confidence in the kitchen. For many, it marked a shift in household roles. “A number of participants shared that their partners had always done the cooking,” Sarah said. “Now, they’re stepping into that space with support, and it’s been an empowering experience.”



CMSI offers a variety of support programs for individuals living with dementia and their caregivers, featuring mental and physical activities such as art, singing, dancing, and even cooking lessons.

A second partnership with Keys for Success highlighted the healing power of music. Music therapist Olivia Barnaclo led CMSI’s Songs In Mind choir, where individuals with dementia and their care partners came together to sing, reminisce, and build community. “Music has an incredible ability to unlock memories and reduce anxiety,” said Sarah. “But beyond that, the choir created a space of inclusion and joy. Everyone is welcome, regardless of singing ability.”

One especially moving moment occurred during the Songs In Mind holiday concert. “There was this beautiful sense of connection in the room,” Sarah recalled. “Seeing families, friends, and community members gather in support and celebration, that’s what this work is all about. Moments like that remind me of the true meaning of what we do.”

Looking ahead, CMSI is dedicated to expanding access to education, resources, and programs that help caregivers and individuals living with dementia feel more confident and less alone. “We’re excited about the opportunity to grow through even more community partnerships,” said Sarah. “The more we can offer, the more families we can reach—and the stronger our community becomes.”

As the Center for Memory Support and Inclusion grows, so does its impact, empowering families, strengthening connections, and leading the way in building a more inclusive community for all. Learn more at theerscenter.org. ■

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The Samaritan Circle is comprised of individuals who generously support the annual needs of ERS through the Good Samaritan Mission Fund, specific programs, and capital initiatives with a donation of \$1,000 or more.

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Donor Profile:

A Legacy of Care and Gratitude: Alan Gast's Commitment to ERS

By Joy Blang

As a child, Alan Gast spent over two years bedridden with rheumatic fever. His devoted mother cared for him daily, reading to him and nurturing his curiosity. During that time, he developed a lasting appreciation for caregivers and for those who suffer. His early health struggles, combined with his strong Episcopal faith, shaped his values—and a lifelong commitment to helping others.

Alan found great success in both his career and personal life and has always made it a priority to share his blessings with others. He and his wife, Tal, raised a loving family and enjoyed an active lifestyle. As they entered their golden years, their children gently reminded them they were reaching “that age” and encouraged them to consider a place that offered healthcare support.

In 2012, Alan and Tal moved to Deupree House. “It was one of the best decisions of our lives,” Alan says. The move brought not just peace of mind, but a deep sense of belonging.

The couple quickly embraced life at Deupree, forming friendships and participating in community activities. When Tal's health declined in 2015, Alan came to fully appreciate the value of Deupree's continuum of care. Tal moved to the Deupree Cottages after a hospital stay and spent the final months of her life there. The caring staff and compassionate support

eased a difficult time for the Gasts.

“It was a relief knowing that everything we needed was under one roof,” Alan reflects. He experienced that same comfort when facing his own health challenges, thanks to the prompt and caring staff.

After Tal's passing, Alan found comfort in the

community that had become like family. Shared meals, warm friendships, and Chapel services gave him renewed strength and purpose.

In gratitude for the care he and Tal received, Alan gives back through the Good Samaritan Mission Fund, the annual fund of Episcopal Retirement Services. “Some of my neighbors have been here a long time, and I worry about them,” he says. “I feel good knowing I'm helping provide a safety net for residents who may outlive their retirement funds.”

Alan's commitment to ERS extends beyond his annual contributions. He's also included ERS in his

estate plans, honoring the staff and residents who've become like family to him. “I want my legacy to continue, supporting the people who have meant so much to me,” he says.

“Neighbors and staff become friends, and friends become family,” he shares.

Alan's legacy is one of love, care, and a deep commitment to a community that has given him so much. ■



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