

Samaritan Times

Fall 2018

BUILDING OUR FOUNDATION TOGETHER

ERS BOARD OF DIRECTORS

Officers:

JoAnn Hagopian, Chair
Ben Blemker
William C. Knodel
Thomas W. Regan
Richard A. Setterberg
Gates Smith
Randal C. Young

Members At-Large:

Dora Anim
W. Thomas Cooper
Rev. Darren Elin
Rev. John Fritschner
Gregory Hopkins
Rev. Canon John Koepke
Rev. David B. Lowry
Marge Malone
Gerron McKnight
Thomas Ottenjohn
Jennifer Payne
Dr. Robert Reed
Barbara Talbot

ERS FOUNDATION BOARD

William C. Knodel, Chair
Richard A. Adams
Ben Blemker
Jon Boss
Tate Greenwald
Laura R. P. Lamb
Robin Smith
Dan Witten
Ellen Zemke

FUND DEVELOPMENT COMMITTEE

Gates Smith, Chair
Richard A. Adams
Katherine Duval
Linda Klump
William C. Knodel
Stephen Landa
Rev. Jason Leo
Rev. Bruce Smith
Rev. Ann Warrington-Wilson



The opening of The Meyer Family Rehabilitation Center was celebrated by the family at a ribbon cutting and reception in October.

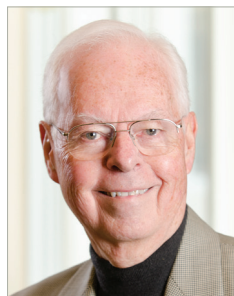
\$4.25M Campaign Goal Met

In one of the most extensive capital campaigns undertaken in organizational history, Episcopal Retirement Services (ERS) just announced its successful completion at the 2018 Great Gatsby Gala.

The campaign was led by ERS Board Member Dr. Robert Reed, a distinguished neurologist who has served the community, including current and former ERS residents, for decades. Charitable contributions exceeding \$4.25M will ensure the success of the overall \$20M Marjorie P. Lee (MPL) community renovation.

The Campaign began with a lead gift of \$877,000 from the estate of former MPL resident Olga Platz. The campaign was driven by major donors, all of whom share a deep connection to the mission for very unique and personal reasons.

Multiple organizations and founda-



Dr. Robert Reed

tions also provided significant project funding, most notably the Diocese of Southern Ohio, a faithful ERS partner.

We'll soon share a full donor list, and their named rooms, within the community.

ERS is grateful for these incredible philanthropists and the MPL Capital Campaign Committee for supporting

this vital renovation, enabling us to deliver top quality person-centered care to our residents for years to come.

MPL Capital Campaign Committee

Dr. Robert Reed, Chair	Rev. David B. Lowry Mike Schueler
Richard A. Adams	Gates Smith
William Knodel	Linda Stetson
Michael Krug	Francie Williams
Susan Lehman	
Terry Lilly*	

**deceased*

ERS
Foundation

Our Mission: *We enrich the lives of older adults
in a person-centered, innovative and spiritually based way.*

Letter to Donors

Dear Friends,

I am pleased to share the inaugural issue of the ERS Foundation Samaritan Times with you. Much has transpired in the three years that I have been at the helm of ERS' philanthropic efforts. My immediate charge was to launch a \$4.25M capital campaign to support the \$20M renovation of Marjorie P. Lee. This was a wonderful way for me to meet and get to know many of ERS' most committed donors who are so deeply invested in the future of ERS. I am thrilled that we have met our goal! We're now shifting our focus to celebrating and honoring the philanthropists and dedicated volunteer leaders who have been the key to our success. The renovation is coming along beautifully, and it is a privilege to show our supporters how their generosity is deeply impacting the lives of those we serve across all of ERS.

We are now looking ahead to the future needs of ERS and how philanthropy will play a critical role in ERS' success. To prepare ourselves for this, I have focused the past year on restructuring the Fund Development department to create new positions based on the evolving needs of the organization and the senior services industry. My goal was to hire experienced development professionals who also share a passion for serving older adults. I am thrilled to introduce the new Fund Development team! They are all looking forward to meeting and getting to know you better in the coming year. I hope you enjoy this inaugural issue of our Samaritan Times. I welcome feedback on how we can improve future issues.



Sincerely,

Joy Rowe Blang

Executive Director of Philanthropy
513-979-2313
jblang@erslife.org



Fund Development Team



Diana Collins

Manager of Donor Relations
513-979-2307
dcollins@erslife.org



Susan Cleverly

Manager of Foundation Relations and the Annual Fund
513-979-2309
scleverly@erslife.org



Kim Harrison

Manager of Corporate Partnerships and Events
513-979-2306
kharrison@erslife.org



Jennifer Snedigar

Donor Database Specialist
513-979-2308
jsnedigar@erslife.org

Leaving a Legacy

Passion for Chaplaincy Program Inspires Half-Million Dollar Gift

Phil Osborn was a resident for many years at both the Deupree House and the Cottages. A kind, intelligent, spiritual and generous man, Phil not only supported ERS during his lifetime as a resident, but also included ERS in his estate plans. Following Phil's passing last year, ERS realized nearly \$500,000. In planning this gift, Phil was clear that he wished the funds to support the chaplaincy program, particularly within the Deupree community.

Thus, his gift will be added to a pre-existing endowment which is restricted to supporting ongoing spiritual services and programs

at the Deupree House, Deupree Cottages and Marjorie P. Lee.

Thanks to Phil's generosity, we are also able to expand spiritual services in the following ways:

- Double the support of our chaplains at the Cottages by increasing from 5 hours per week to 10 hours per week.
- Fund the costs of a visiting Catholic priest who presides over a weekly Mass in the Deupree Chapel for a significant number of Catholic residents.

We are grateful to Phil for the legacy he created for himself which will better the lives of our residents for years to come.



Phil Osborn

Creating a Legacy Through Charitable Giving

Including ERS in your estate plans is a wonderful way to fulfill your desire to impact the mission of ERS and the lives of those served, while also providing you with opportunities for personal tax and financial benefits.

There are many ways to plan a gift to meet your goals. One of the simplest is to include ERS as a beneficiary of your will by specifying an amount, percentage or the residual of an estate. This can be done upon the creation of a will or by simply adding a codicil to an existing will. The following is sample language which you may use to state your giving intentions:



Sample bequest of remainder of estate: ... "I give, devise, and bequeath to the Episcopal Retirement Services Foundation, Tax ID #31-1570272, all [or state the fraction or percentage] of the rest, residue, and remainder of my estate."

A sample Bequest of a specific amount ... "I give, devise, and bequeath \$_____ to the Episcopal Retirement Services Foundation, Tax ID #31-1570272."

Please notify the ERS Foundation of your decision to include us in your estate plans.

Are you interested in making a planned gift?

Contact Joy Blang, by calling 513-979-2313, or by emailing her at jblang@erslife.org

Affordable Living News

Inviting Common Spaces Encourage Community Thanks to Art Donation

Decent, safe, sanitary and in good repair. These are US Department of Housing and Urban Development (HUD) requirements for affordable housing funding.

At ERS, we know these minimum standards are not enough to enable over 1,700 Affordable Living by ERS (AL by ERS) residents to live with dignity and truly thrive.

Innovative social, educational, health and wellness programming not often found in affordable housing allows residents to come together, and it all begins with thoughtful design of each unique property. “Residents need inviting areas of the community to congregate. From there, they can access critical supports which allow them to remain active and independent,” says Vice President of Affordable Living and In-Home Services, Kathy Ison-Lind.

Newly opened communities Marlowe Court and Knowlton Place received a gift of over 50 works of art from donor Shirley



Shirley Hudson donated more than 50 pieces of art from her collection.

Hudson to help make common areas feel more like home. Shirley explains, “After collecting art for more than 40 years, I have begun downsizing. I learned of AL by ERS through an ERS volunteer, Karen Bell. A tour of several AL by ERS communities helped me realize I had found an excellent way to have some of my collection continue to bring joy to others. It has proven to be a ‘win-

win’ partnership.”

To complete the project, Debbie Fredette of The Art Company generously volunteered her time and expertise to catalog the pieces, determine where they would be displayed and oversee the installation.

“We are grateful to Shirley and Debbie for coming together to enhance the quality of life in these communities,” says Ison-Lind.

New AL by ERS Developments

Madison Villa will open 96 apartments in 2020

New Carlisle Village will open 96 apartments in 2020

Friendship Acres will open 114 apartments in 2021



Partners and civic leaders celebrated the opening of the latest AL by ERS community, Maple Knoll Meadows, with a ribbon cutting.

Are you interested in supporting services at our Affordable Living by ERS communities?

Contact Joy Blang, by calling 513-979-2313, or by emailing her at jblang@erslife.org

Schmidlapp Challenge

Jacob Schmidlapp and ERS Share Common Moral Standards

ERS received tax credit awards to support three new Affordable Living communities in 2017. All are in areas of the city where significant community wide revitalization efforts are occurring. This allows ERS to serve as a voice for lower income seniors. Knowlton Place is a new construction community with 56 units in Northside. Marlowe Court, also new, includes 53 units in College Hill. Finally, ERS began renovation of Madison Villa this fall, a 93 unit community in the heart of Madisonville.

ERS received a generous grant from the Jacob G. Schmidlapp Trusts, Fifth Third Bank, Trustee to support community space furnishings and fitness equipment in these communities. However, to receive the full \$100,000 grant, ERS was challenged to raise an additional \$50,000. Announced at the Samaritan Awards Celebration late last year, guests responded to the challenge, along with a grant



Jacob G. Schmidlapp

from The Ruth J. and Robert A. Conway Foundation, to leverage \$150,000 for community room and patio furniture and fitness equipment.

We believe Jacob Schmidlapp is smiling down on us. Growing up in poverty as the son of German immigrants in the 1850s, he faced great hardships and was determined to make a better life for

himself and others. At the age of 27, Jacob established the Union Savings and Trust Company, which later became Fifth Third Bank. Schmidlapp was deeply concerned about the housing problem at the turn of the century and devoted himself to developing dignified affordable tenements for low-income families. He referred to his approach as “Philanthropy Plus 5%,” encouraging others to invest to do good while receiving a modest return on their investment. He installed bathrooms in each apartment, ensured ample air circulation through strategically placed windows, created community rooms and encouraged civic and social gatherings.

\$100,000

CHALLENGE

GRANT INSPIRES

DONORS TO GIVE.



Bette, Pollard, and Joyce are residents at Knowlton Place.

These were not housing requirements then, but what Schmidlapp considered to be a moral standard. ERS continues the example set by Schmidlapp to create communities where elders thrive. ERS debuted a video at The Great Gatsby Gala showing how the Schmidlapp Challenge impacted residents in these communities. See it at episcopalretirement.com/donate.

Annual Fundraising Event

The Great Gatsby Gala was the Cat's Meow!

Thank you to our lead sponsors!

modelgroup

DEVELOPMENT • CONSTRUCTION • MANAGEMENT



OCCH
OHIO CAPITAL
CORPORATION
FOR HOUSING



Bahl & Gaynor
BMO Harris Bank
Fifth Third Bank
Gallagher
Home Care Assistance
Planes Moving and
Storage

PNC Bank
Premier Mail and
Fulfillment
Ridge Stone Builders
SFCS Architects
Sysco

Thank You Gala Committee!

Pat Donaldson
Vivian Kline
Peggy Landes

Glenna Light
Roberta Peebles

Already planning for next year!

SAVE THE DATE: The Mad Hatter Ball
Friday, October 4, 2019

EPISCOPAL RETIREMENT SERVICES
GOOD SAMARITAN MISSION



**THE MAD
HATTER BALL**

The Great Gatsby Gala on September 20th was the berries! Over 300 guests, many dressed in 1920's attire, were treated to an evening filled with live music, delicious food, silent auction, dance performances and WLWT TV News Anchor Courtis Fuller as the Emcee!

The event raised over \$250,000; proceeds benefit the ERS Good Samaritan Mission Fund, which helps over 14,000 elders annually.



From top: Gary and JoAnn Hagopian; Ellen and Doug Zemke; Debbie Fredette with Sam and Kim Moscarrino; dancers from the UC College Conservatory of Music entertained the crowd with flash mob antics.

Are you interested in sponsoring an ERS Fund Development event?

Contact Kim Harrison, by calling 513-979-2306, or by emailing her at kharrison@erslife.org

Stewardship Events

The new Deupree Cottages pavilion is a gift from Sandy Harris. She made this donation in honor and deep appreciation of the incredible people who provide her with loving and expert care at the Cottages.



Jack Kirby at the opening of Kirby House, an MPL memory support household in memory of his wife Alberta.



Norma Grosse, Mary Grace Kirby, Jack Kirby, Glenn Kirby, Karen Durand, Dick Durand, Mary Alice Koch



ERS CEO Laura Lamb with Steve Smith and Bobby Maly, of the Model Group, at The Partners Breakfast



CeCe Mooney with The Living Legacy Society Luncheon Keynote Speaker Jon Boss

Why I Give

“My giving blesses those who need it most”

Gates Smith
Vice Chair of Fund Development

“I support THE Good Samaritan Mission Fund (GSM), because it is THE only fund through which Episcopal Retirement Services (ERS) receives financial support to fund our person-centered care, including these arrays of services: Affordable Living, Parish Health Ministry, Deupree Meals On Wheels, Partners In Care Fund, and Spiritual Care. I know when I give to the GSM; my giving blesses those who need it most. Other than the annual Gala (such as The Great Gatsby event held on Sept. 20), GSM is the primary source of Philanthropic support for ERS’ unique services. It needs AND deserves our support!”



Leadership Level Giving

The ERS Samaritan Circle recognizes individuals who give \$1,000 or more annually to support the Good Samaritan Mission (GSM).

All ERS Samaritan Circle members are celebrated at an annual luncheon, held by ERS executive staff.

Members who give \$3,000 or more are also invited to an exclusive cocktail party.

Platinum Samaritan Circle members are invited to a special lunch hosted by an ERS executive staff member or Board member.



Platinum Level:
\$10,000 and over



Silver Level:
\$3,000-\$4,999



Gold Level:
\$5,000-\$9,999



Bronze Level:
\$1,000-\$2,999

Make a contribution to support the work of the ERS Good Samaritan Mission!

Contact Susan Cleverly at 513-979-2309 or visit episcopalretirement.com/donate.