# Living Well Senior Solutions

Answers, Advice & Help Are Here

2012 Annual Report



Spring 2013

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(Standing) Peggy Slade-Sowders, Director of Living Well Senior Solutions, with Chuck and Carol Schlegel; Photo by Gary Kessler

# ERH Communities & Services

**Premier Retirement Communities** Deupree House | Marjorie P. Lee

#### Affordable Living Communities

Cambridge Heights | Canterbury Court Elberon | Forest Square Woodburn Pointe | Shawnee Place St. Paul Village | St. Pius Place

**Community Services** Deupree Meals on Wheels Living Well Senior Solutions Parish Health Ministry



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We Welcome Your Comments The Linkage Editor Episcopal Retirement Homes 3870 Virginia Avenue • Cincinnati, Ohio 45227 (513) 271-9610 • erhmarketing@erhinc.com

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#### Linkage is Available Online

To better serve you, Linkage magazine is available via email and on the Episcopal Retirement Homes website at **www.EpiscopalRetirement. com.** If you would like to be removed from the Linkage mailing list, please call (513) 271-9610.

#### Make A Donation Online

For your convenience, donations are now accepted online at **www.EpiscopalRetirement.com** under Charitable Giving.

Linkage is a resource to address issues and interests of older adults, providing a link between ERH's programs and the community. For 60 years, Episcopal Retirement Homes has been a not-for-profit, financially sound organization dedicated to improving the lives of older adults from all faiths through innovative, quality services based upon their values and delivered by highly experienced, deeply committed professionals.



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## Your Home 🗘



# Deupree Cottages Rated Top 10

he Ohio Department of Aging recently announced the results of its 2012 Nursing Home Family Satisfaction Survey. Episcopal Retirement Homes' Deupree Cottages received an overall 95.4 percent favorability rating, achieving eighth place out of 948 participants in the state of Ohio and ranking as Cincinnati's only Top 10 skilled nursing care center.

The survey asked more than 27,000 family members to comment on the nursing care their loved ones received, focusing on two core questions:

1. Are you satisfied with your facility?

2. Would you recommend it to others?

Deupree Cottages respondents offered an overall satisfaction score of 98.2 percent; the same percentage would recommend the community. "We are excited about the data because it's from people we are actually serving," says Laura Lamb, ERH Vice President of Residential Housing and Healthcare.

Additional survey questions addressed everything from administrative effectiveness (admission processes, social services, nursing coverage, direct care and therapies) to laundry, dining experiences and overall comforts. "The survey covered every aspect of the resident's life—food, the amount of choice, whether the staff is courteous and attentive—you name it," Lamb adds.

by Paul Antus

These statistics affirm the importance of the Person-Centered Care approach used throughout the ERH communities. Independent, nonprofit accreditors of health and human services-the Commission on Accreditation of Rehabilitation Facilities (CARF) and the Continuing Care Accreditation Commission (CCAC)-praised the Person-Centered Care approach among ERH communities, as well as additional ERH programs. Residents engaged in the Council for Life Long Engagement program, for example, use their professional and life experiences to offer educational enrichment for students in area schools. "CARF said the [CLLE] program is a tangible example of how we are restoring purpose, making sure that our residents are engaged, active and respected in the community," Lamb notes.

ERH administrators distinguish Deupree Cottages and its sister community, Marjorie P. Lee, where zero deficiencies were found in a recent State of Ohio inspection, as places where residents live *at home* rather than living *in a home*. The lifestyle imbues residents with a sense of freedom, choice and purpose. "We work in our residents' home, adjusting our schedules to meet their needs and desires... and we can do all of this while still delivering the highest quality of medical care," says Emerson Stambaugh, Deupree Health Services Administrator.



# Meet The Board

The Episcopal Retirement Homes (ERH) Board of Directors makes it a priority to serve the ERH mission: enriching the lives of older adults in a person-centered, innovative and spiritually based way.

"I am a true believer of ERH's mission," says Robin Smith, Chair of the board and former Procter & Gamble IT professional. "I am giving my time and talents to spread that mission to as many older adults in our communities as possible."

In this issue—and upcoming issues—of Linkage, you'll meet the dynamic and passionate volunteer board members who help drive ERH.

by Whitney Harrod // Photographs by Gary Kessler



### Elizabeth Williams Representative to the Board, Chairman of Residents Council

Former occupation: College professor of gerontology and developmental psychology.

Area of expertise: My interest is in the later years of life. I received a Ph.D. from the University of Michigan with a specialist degree in gerontology. I once taught the subject, and now I am the subject!

Something people might not know about you: I have served on several senior-focused boards, including the Presbyterian Villages of Michigan. Currently as a Deupree House resident, I work on the resident newsletter.

How long have you been with ERH? To be near my daughter who lives in Mariemont, we moved to the Deupree House in 2010 from Grosse Pointe, Mich. This is my second year on the ERH Board.

Why do you volunteer on the Board? ERH is such

a well-run organization. If not, my background in gerontology would help me express any concerns. Residents have a say in the way things are operated.

Most rewarding part about living at ERH: The Deupree House is a great place to call home. They do a good job providing living for older people. I especially enjoy the beautiful swimming pool.

What do you do in your free time? My husband and I attend adult classes at the University of Cincinnati. We enjoy the Cincinnati parks and often go to nearby Ault Park to walk or picnic.



### Richard "Dick" N. Adams Member of the Board of Directors & ERH Foundation Board

Former occupation: Procter & Gamble professional with 35 years of finance and investment experience.

How long have you been with ERH? Thirty years in different capacities. I originally joined the Marjorie P. Lee Advisory Committee. My father-in-law was a member of the Memorial Homes Board and a Marjorie P. Lee resident. My wife and sisters-in-law have also been involved as volunteers.

Why do you volunteer on the Board? I enjoy serving this extremely well-run organization and its lovely residents, as well as supporting a family connection with ERH of many years.

Most rewarding part: It gives me great pleasure helping our community through affiliations with organizations like ERH. Over time, I've worked with the Church of the Redeemer, Clovernook Center for the Blind and Visually Impaired, Hyde Park Center for Older Adults, Families Forward, The Cincinnatus Association, Cincinnati State, The University Club of Cincinnati and Cincinnati Public Schools.

What do you like to do in your free time? When I'm not working, I golf or read a good book. We regularly attend performances at Cincinnati Music Hall and Cincinnati Playhouse in The Park. We also enjoy visiting our sons and a summer home on Georgian Bay in Ontario, Canada.



### **Thomas Kahle** Director of the Board, Former Chair of the Board

Occupation: Attorney with practice concentrations in health care and finance. I served for 10 years as cochair of Baker Hostetler's national healthcare practice.

Area of Expertise: I bring knowledge of senior living finance, as well as healthcare reform and regulation and its potential impact on ERH.

How long have you been on the Board? More than 15 years.

Why do you volunteer on the Board? I firmly believe in the value of the ERH mission. It is also exhilarating to work side by side with a group of talented people who share the same passion.

Most rewarding part: Seeing the difference this organization makes in the lives of older adults. Working with my fellow Board members and the management team in furtherance of the mission is exhilarating.

Something people might not know about you: Besides being an avid bicyclist, I am a history buff. I have been learning more about the history of where we live, particularly Cincinnati's East End steamboat building in the 19th and early 20th centuries.

# Living Well Senior Solutions



# A thriving geriatric care management program provides families with support and peace of mind.

by Judi Ketteler **//** photography by Gary Kessler

hange can frighten, devastate and overwhelm. Anyone who has been through a crisis knows this. The people behind Living Well Senior Solutions (LWSS) know it, too. That's why this program aims to be the preventive measure, the arm to lean on for support and the bright spot in a cloudy situation—all rolled into one. What began as a small pilot program in 2008 with just one client has become an in-demand service. Much of the growth has happened in the last two years. In fact, measured by the number of hours care managers spent serving clients this past year, the LWSS program nearly doubled in size from 2011 – 2012.

### Focusing on Abilities

From the very beginning, LWSS made it a priority to help older adults live at wherever they call home for as long as possible, to take advantage of opportunities and to stay healthy in mind, body and spirit. "The program is really all about promoting strength of people," says Peggy Slade-Sowders, who heads up the program and also serves as one of the five care managers. Instead of bringing attention to what an older adult can no longer do, the focus is very much on promoting the things they can do. It has always been about that, she says, but as the program has hit its stride, that focus has only sharpened.

### An Extended Family Member

LWSS is a geriatric care management program that truly serves the entire family. In fact, it's often the grown children who contact Slade-Sowders for help. "I always say that our care managers are like extended family members. Each one of our care managers treats the clients as if they were her own mother or father," says Kathy Ison-Lind, Vice President for Affordable Housing and In-Home Services. "The care managers know all of the resources in the city, and they are truly advocates for their clients."

Laura Lindsay hired LWSS in the summer of 2012 when her father's care needs suddenly escalated. "The care manager's role is absolutely essential for us, because my parents do not have family nearby: I live in Pennsylvania, my brother is in Minnesota, and my parents' siblings are all on the West coast," Lindsay says. "Peggy is our local presence and handles a myriad of things you might expect family members to do, as well as things that would be difficult for a family member to do."

Laura's parents, Chuck and Carol Schlegel, both 77, now live at Marjorie P. Lee. But for a time, Mr. Schlegel was living in a more restrictive environment in another community, and it wasn't working out. Peggy helped coordinate Mr. Schlegel's transfer to assisted living at Marjorie P. Lee, as well as Mrs. Schlegel's move from their home to an independent living apartment there.

"She helped them settle into a routine and establish social connections at Marjorie P. Lee," Lindsay says. "Peggy has worked with my mother, too, to add activities to her schedule—such as yoga, swimming and knitting—at a pace that she was comfortable with."

The Schlegels now count Slade-Sowders as a valuable member of their care team, right along with their children. "She was really instrumental with helping me get into the program, and she helped my wife, son and daughter work out everything," Mr. Schlegel says. "She has really become a close friend, and I know that I can call her anytime."

### Serving at the Client's Convenience

As care managers, Slade-Sowders and her team of four look at the big picture and try to figure out what services the client needs. Care managers can do everything from accompanying clients to a doctor's appointment to arranging in-home support and services. "We try to help with whatever they most need," Slade-Sowders notes. "For example, we had a client who quilts and knits. She had forgotten how to do one knitting stitch, and she kept getting stuck. We found a knitter to come in and help her with that stitch. It's still up to her if she does it, but she has what she needs now."

The average time care managers spend with clientele ranges from an hour a month to 30 hours a month, depending on what is needed at any given moment. "Our services are very personalized and very flexible, and we respond to our clients' needs at their convenience, not ours," Slade-Sowders says.

So why the sudden explosion of growth in the LWSS program? "We're really established now, and word is growing because we've been getting such good results for our clients," Slade-Sowders explains.

Those results really improve an individual's quality of life. In the past year, for example, Living Well Senior Solutions has been able to:

- Prevent at least 10 hospitalizations of clients because of early intervention and follow-up. Often it means doing a mini-assessment when they notice a client isn't feeling well and contacting the doctor immediately to see about medication before a condition escalates.
- Prevent countless falls by noticing potential situations that might not be safe.
- Help a client go to both Italy and New York for an opera tour.
- Ensure that a client can keep up a favorite ritual: attending Xavier basketball games.
- Provide rides to doctor's appointments, the grocery store and other errands.



## Meet the Care Managers

Jeanne Palcic, MGS, RN, has been with LWSS since its inception and has been instrumental in designing the program. Jeanne has 27 years of experience in health care, including geriatric care management and nursing home administration. She has served as a home health agency director, a registered nurse in a hospital and is currently director of Parish Health Ministry.

**Pam Ward, RN,** has 39 years of diverse nursing experiences. From neonatal intensive care coordinator to charge nurse of a memory support unit, all of her nursing skills have come together to allow her to be an effective "health care navigator" and caring advocate for her clients.

- Help clients and their families with the complicated ordeal of selling a house.
- Ensure that spouses and families are together for Thanksgiving, Christmas and family weddings.
- Assist with technology so clients can stay safely in their homes (includes things such as emergency response devices, medication dispensing systems and new phones that make it easier to hear).
- Help track recommended health screenings.

But by far, Slade-Sowders says, the biggest result is something hard to track on paper or measure on a spreadsheet: "It's about offering assurance and peace of mind to the elder client and their loved ones. That's what motivates us every day."

**Betsy Babb, RN,** has been a nurse for 30 years, and although she has a strong background in surgical oncology, gastrointestinal, and occupational health and research, her passion is with elders. "Geriatric care management is all about meeting people where they are," Babb says. "You meet people at an often-vulnerable time in their lives and reassuringly shed light on a difficult situation that eases the transition process of aging."

**Donna Ebersold, MSN, RN,** returned to her native Cincinnati after living most of her adult life in the San Francisco area. She is a psychiatric nurse specialist with additional experience in children's oncology and home health. "Geriatric care management is about engendering hope and providing gentle counsel to make decisions that create coherence for our clients," Ebersold says.

**Peggy Slade-Sowders, Director, Living Well Senior Solutions,** started as a dietitian and has been in the elder care field for 30 years, including positions of administrator, executive director and regional director of operations. A personal experience managing her husband's care after a cerebral hemorrhage—along with a passion to serve elders—led her to the field of geriatric care management.

The Living Well Senior Solutions team—(left to right) Betsy Babb, Donna Ebersold, Peggy Slade-Sowders, Pam Ward and Jeanne Palcic—provides compassion, professionalism and peace of mind.

# Dear Friends,

The ERH Board of Directors and Staff are committed to delivering our Mission, "To enrich the lives of older adults in a person-centered, innovative and spiritually based way." We are pleased to provide this annual report to demonstrate how we have performed in fulfilling this obligation. On the following pages, you will find the stories of how we have reached out to those in need through financial assistance and the provision of needed services and support.

As we reflect on our accomplishments for 2012, it was a year of several notable successes and continued repositioning for future developments. With the economy continuing to slowly recover, we have experienced improving financial performance fueled by stronger occupancy, diligent management of expenses and strong investment results.

But our future holds many uncertainties including the major changes beginning to occur with the transformation of healthcare delivery systems and payments. Our strength to date has been our willingness to stay alert to change, make smart choices in our strategic directions and to focus relentlessly on successful execution.

Our notable accomplishments for 2012 include:

- Added four affordable living communities in the Cincinnati and Springfield markets
- Completed the renovation of St. Paul Village II
- Achieved CARF/CCAC voluntary accreditation for Marjorie P. Lee, Deupree House and Deupree Cottages
- Completed a major refinancing resulting in a substantial reduction in debt service
- Selected as a Top WorkPlace for the third year in a row
- Reviewed ERH's governance structure and established a new Affordable Living LLC and Board
- Deupree Cottages ranked 8th in the State based on resident satisfaction survey results for over 900 nursing homes
- Made a substantial investment in developing our Next Generation Leaders
- Implemented more robust resident safety and communications technologies

Our commitment to enriching the lives of elders is unwavering. It is our reason for being; our call to servant ministry for those who have given so much to our country and our communities and now benefit from our support in their later years. As always, we are grateful for the support of our many donors and volunteers who commit their time, talent and treasure, which permits us to provide compassionate, person-centered services for older adults.

Sincerely,

Juin, Martindell

Trish Martindell 2010–'12 Chair, ERH Board of Directors

**R. Douglas Spitler** President and CEO

# 2012 Overview and Financial Report

### **Balance Sheet**

for the Years Ending December 31, 2012 and 2011

Assets	2012	2011
Current Assets	15,776,000	9,220,000
Marketable Investments	24,765,000	28,070,000
Fixed Assets	108,459,000	76,281,000
MPL Endowments	19,801,000	18,707,000
Other Assets	5,223,000	7,254,000
Total Assets	\$174,024,000	\$139,532,000

Liabilities	2012	2011
Current Liabilities	11,211,000	8,632,000
Unamortized Entrance Fees	17,316,000	13,818,000
Long-Term Debt	51,800,000	41,062,000
Other Liabilities	6,637,000	3,515,000
Total Liabilities	\$86,964,000	\$67,027,000

Net Assets	2012	2011
Permanently Restricted	21,620,000	20,503,000
Temporarily Restricted	144,000	150,000
Unrestricted	65,296,000	51,852,000
Total Net Assets	\$87,060,000	\$72,505,000

Total Liabilities & Net Assets	\$174,024,000	\$139,532,000
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### Total Individuals Served / Contacts Made

31,934 Parish Health Ministry\*

447 Meals on Wheels clients 632 Affordable Living 306 Independent Living 50 Assisted Living 234 Nursing Care

33,603

\*Contacts made through health screenings, referrals and other activities

.....

2012 Contributions and Legacy Commitments Good Samaritan Mission annual gifts......\$455,218 Major gifts & commitments.....\$582,846

### Condensed Statement of Revenue and Expenses

for the Years Ending December 31, 2012 & 2011

	2012	2011
Operating Revenue	27,328,000	26,226,000
Operating Expense	(30,482,000)	(27,197,000)
Net from Operations	(3,154,000)	(971,000)
	2012	2011
Non-Operating Revenue	3,970,000	1,293,000
Limited Partner Equity	9,474,000	4,147,000
Total Change in Net Assets	13,444,000	4,469,000

### 2012 Ministry Costs

for the Years Ending December 31, 2012 & 2011

Ministry Item	2012	2011	Difference	2012 %	2011 %
A - Resident Financial Aid	1,635,000	1,566,000	69,000	65%	66%
B - PHM	205,000	201,000	4,000	8%	9%
C - Wellness	219,000	230,000	(11,000)	9%	10%
D - Affordable Housing	63,000	99,000	(36,000)	3%	4%
E - Spiritual Care	165,000	173,000	(8,000)	7%	7%
F - Volunteers	103,000	68,000	35,000	4%	3%
G - Staff Assistance & Partners in Care	108,000	16,022	91,978	4%	1%
Total Ministry Costs	2,498,000	2,353,022	144,978	100%	100%



Total Operating Costs	30,482,000	27,197,000
A-G - Total Ministry Costs as a percentage of Total Operating Costs	8.2%	8.7%

This condensed financial information was extracted from the 2012 Episcopal Retirement Homes, Inc. financial statement, a copy of which is available in the president's office.

2012 Ministry Costs

# 2012 Ministry Report

Not-for-profit organizations have a rich tradition of providing services and programs that directly benefit the communities and constituents they serve. Since its inception in 1951, Episcopal Retirement Homes (ERH) has been reaching out through its mission to improve the lives of older adults.

### FINANCIAL ASSISTANCE

A resident at St. Pius Place came to Community Manager Lindzey Webb to show off his brand new smile. He recently had dental work done to remedy problems due to poor health and prior nutritional deficiencies. When Lindzey suggested that Partners-In-Care might be able to reimburse him so that he would no longer have difficulty paying off his dental bills, he was thrilled. Though he was a donor to the Good Samaritan Fund, he never thought to ask if ERH funds would be able to support him in his own time of need. The request was immediately approved, and the St. Pius Place resident can now show off his beautiful, healthy smile with no worries.

2012 Financial Assistance

Direct Subsidy (11 residents)	\$378,655
Medicaid Subsidy (34 residents)	\$1,253,228
MOW Subsidy (4 residents)	\$3,410
Partners in Care (23 residents)	\$17,815
Staff Emergency Assistance	
(13 staff members)	\$6,279
Hyde Park Center for Older Adults	\$10,600
Tuition Assistance	\$84,021
Affordable Living ministry funding	\$63,194
Services provided by volunteers	\$260,455
TOTAL	.\$2,077,657

### AFFORDABLE LIVING

Episcopal Retirement Homes is proud to offer rentsubsidized, affordable, senior living communities that provide a variety of options and services not often found in communities for low-income seniors. Our philosophy is that older adults deserve to live with dignity and enjoy life in a safe and enriching community regardless of their financial situation.

In addition to St. Paul Village in Madisonville, St.

Pius Place in South Cumminsville, Canterbury Court in West Carrollton and Cambridge Heights in Cambridge, ERH doubled the number of affordable living communities served in 2012 by adding four new properties purchased from our preferred developer, The Model Group. ERH now owns and manages Elberon, Forest Square and Woodburn Pointe in Cincinnati and Shawnee Place in Springfield, Ohio. "This is an exciting venture for both organizations," notes Doug Spitler, president and CEO of ERH. "Model Group has long been known for its knowledge and experience in senior living construction. Combining that expertise with ERH's knowledge and strength managing senior properties opens many new opportunities for both the organizations and the residents they serve."

In ERH affordable living communities, residents will find social workers, chaplaincy services, resident gardens, transportation services—even Wii bowling teams! There are no additional fees for these services and amenities. We are proud to either own or manage these communities, and the results for many of our residents are truly life changing.

### 2012 Affordable Living



Steve Smith, CEO of Model Group, with ERH's Kathy Ison-Lind and Doug Spitler

### 2012 Annual Report 🗇

### **COMMUNITY OUTREACH**

While ERH serves the needs of its residents, we also know we are part of the communities in which we work and live. Part of our work to be good community stewards is outreach though a variety of programs.

The Council for Lifelong Engagement (CLLE) is dedicated to ending ageism while imparting the wisdom of elders to schoolchildren of all ages. CLLE encourages and enables elders to share their knowledge and talents with schoolchildren to reverse the negative aspects of ageism. As Laura Lamb has stated, "Our children will learn first hand from elders who have lived rich and rewarding lives. They will make history, science and even math come alive through their experience and wisdom." In 2012, CLLE continued its partnership with Nativity School in Pleasant Ridge, St. Mary's in Hyde Park, Mt. Notre Dame High School and Kilgour in Hyde Park.

2012 Community Outreach

Number of residents involved in CLLE 208
Number of students involved in CLLE 1,122
CLLE volunteer hours753
Average number of people
per month at The Daily Bread 600
Average number of families
per month at The Daily Bread 200
Martins Ferry toys donated 293
Martins Ferry monetary donations \$1,112

#### **VOLUNTEERS**

Each year, ERH volunteers donate thousands of hours of their time and talents toward ensuring that ERH meets its mission. If we were to calculate the cost, we would have paid \$260,455 for the 20,035 hours volunteered this year. These volunteers help staff with tasks ranging from filing and mailing to taking photos and delivering meals. Most of our volunteers are Good Samaritans from the local community and residents' family members. What you may not know is that residents also play a vital role in volunteerism at ERH as well.

Using donated yarn, the women of St. Paul Village and area volunteers knitted and crocheted 11 prayer shawls and 118 baby hats, then donated







From top: David Lowry, Marjorie P. Lee (MPL) resident, enjoys a meal at Deupree House (DH) as Nativity students demonstrate what they learned from the residents' presentation on etiquette; Resident Mary West shares her expertise in music; DH resident Bill Victor shares his knowledge on communication and technology.

### 2012 Annual Report

them to Bethesda North Hospital. This effort was named "Crochet for a Cause" and received newspaper coverage in the Community Press. "Our goal is not only to involve our residents, but anyone in the community who likes seniors and likes to crochet," says Volunteer Coordinator Chris Lemmon. The group's 2013 goal is to make scarves for the homeless, then donate them to Mercy Franciscan St. John Social Services in Over-the-Rhine.

### 2012 Volunteers

Total hours
Meals on Wheels40.3%
ERH Board of Directors10.7%
Corner Store9.9%
Cambridge Heights & Canterbury Court 15.3%
St. Paul Village & St. Pius Place7.5%
Marjorie P. Lee, Deupree
Cottages & Deupree House16.3%
Auxiliary members
Auxiliary donations \$6,225





From top: St. Paul Village residents Cecil Berry, left, and Carol Hughes; Displaying some of the beautiful crocheted items



Attendees learn ways to cope in trying times during the 2012 annual Refresh Your Soul conference.

### PARISH HEALTH MINISTRY

Parish Health Ministry extends the ERH mission and ministry outside the walls of the retirement communities and into the surrounding communities of southern Ohio. Working with 80 churches in the region, this extension of ERH encourages congregations to renew their role in health care through advocacy, education and wellness programs.

One recent incident was a possible lifesaver for a client at Gabriel's Place, where volunteers work with the underprivileged in the surrounding community. While watering the gardens, a new gardening intern began to walk in circles and appeared confused. The program manager was concerned about him and did not want to leave him alone, so he asked the parish nurse to check on him. She learned that the intern had diabetes and had taken his insulin in the morning, but had not yet eaten lunch. He had been working for several hours gardening in the heat, and his speech was becoming difficult to understand. The parish nurse retrieved some oranges and juice and within a very short



Phyllis Armstrong working with vegetables in the Gabriel's Place outreach kitchen

time he was back to normal and apologized for alarming them.

2012 Parish Health Ministry

Congregations	. 80
<i>Contacts</i>	934
Volunteers	564
Hours of Service7,	565
Cost \$205,	000

### **COMMUNITY EDUCATION**

ERH staff often share their expertise on a variety of senior living topics with community organizations and groups across Greater Cincinnati and throughout Southern Ohio.

Parish Health Ministry held its annual conference in March with more than 150 attendees. Caregivers, health professionals and those dealing with loss were taught about spiritual care in times of trial. Doug Smith, a counselor and health care administrator with 25 years of experience delivered the keynote. Attendees were given humorous yet meaningful insights into how introducing humor in the face of terminal illness can increase quality of life. Smith's discussion—I Could Die Laughing: Promoting Humor with the Sick and Dying—was presented to a sold-out crowd Friday evening, March 9. On Saturday, March 10, Smith presented Spiritual Care in Times of Trial & Loss, a topic that focused on how to help people find meaning and value in the midst of pain and suffering.

2012 Community Education
Refresh Your Soul Conference
Total number of attendees at
ERH educational events
Total number of attendees at
Parish Health Ministry educational events 453

#### CHAPLAINCY

ERH provides each of its communities with chaplains who serve the spiritual needs of the residents and those around them. The job of the chaplain can be very challenging—residents are often dealing

## 🗘 2012 Annual Report



Top (back to front): Pam Jones, Mary Mitchell, Walt Collier and Willie Brooks; Bottom (from left): Steve Tomes and Willie Brooks are two of the dedicated staff and volunteers who deliver more than 400 meals per day.

with life-altering events and serious life and death issues. With these challenges, though, comes the potential for overwhelming joy as chaplains walk through life's journey with residents—listening, comforting and giving guidance during a time when it is most needed. The ministry of the chaplain not only benefits our residents, it also benefits staff, volunteers, resident families and the wider community. Wherever ERH can enrich lives, satisfy spiritual needs and nurture souls, it is our mission to offer our service.

St. Pius Place residents really look forward to weekly visits from Deacon Fred McGavran, for example. They get dressed up for the occasion and give him a warm welcome.

2012 Chaplaincy	
Worship Services	)4
Bible study sessions	16

### **MEALS ON WHEELS**

With Deupree Meals on Wheels, ERH provides older adults throughout Cincinnati with warm, nutritious meals delivered to their homes. More than 400 meals are delivered per day by compassionate and caring members of our team or dedicated volunteers. Most of our volunteers have been with the Deupree team for 17 to 28 years, demonstrating extraordinary dedication to the program and people they serve. It's an important social contact for the elders who lack family support and could otherwise easily become isolated.

"At age 90, my doctor realized I was getting too much salt in my diet and said I needed Meals on Wheels," says Katherine Riley, a Meals on Wheels recipient. "It has been simply wonderful. I enjoy the visits and am thankful for what they do. I call them 'angels on wheels' because these are volunteers. The whole program is really great. It's what keeps me going!"

2012 Meals on Wheels

Meals	78,541
Clients	447
Neighborhoods	25

If you would like to support our mission in 2013, your gift—financial or otherwise—is always appreciated. For more information on how you can help shape ERH's ministry, contact Diane Decker, Director of Fund Development, at 513.272.5555 ext. 4283 or visit our website at corporate.episcopalretirement.com/charitable-giving.

# Living Legacy Society

Individuals giving through their estate

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### 2012 Annual Report

# 2012 Community Partnerships

As part of its mission to improve lives, ERH actively develops and supports ministries that benefit thousands of individuals each year. To request a copy of the donor list in print, please contact the Fund Development office at 513.272.555 ext. 4283.

### Foundation Partners

Anonymous The Cincinnati Foundation For The Aged Enterprise Community Partners Heinzerling Foundation The Kuntz Foundation of the Dayton Foundation H.B., E.W. & F.R. Luther Charitable Foundation Walter A. Pfeifer Foundation PNC Foundation Rindsfoos Foundation The Robert H. Reakirt Foundation, PNC Bank N.A., Trustee The Robison Family Foundation Jacob G. Schmidlapp Trusts, Fifth Third Bank Trustee C. Bascom Slemp Foundation

### Organizational Partners Gifts \$5,000 and above

Episcopal Diocese of Southern Ohio Henkle Schueler & Associates Model Group, Inc. PNC Financial Services Group

### Gifts \$4,999 and below

Aarrowood Plants & Flowers AbiBow Recycling LLC ASI Signage Innovations AXA Foundation Bahl & Gaynor Investment Counsel BakerHostetler Bayer Becker Blackstone Group, LLC David J. Brainin, LLC Bricker & Eckler Cars To Fit Any Budget Charter One/Citizens Bank China Gourmet Cincinnati Construction Management Cincinnati Magazine Cincinnati Playhouse in the Park Colgate-Palmolive Collier Nursing Services Design Collective DeBra-Kuempel Errands & Services LLC Family Bridges Home Care Fifth Third Bank, Private Client Group Fresh Market Frost Brown Todd LLC GBBN Architects, Inc. Gallagher SKS Graydon Head Gwen Mooney Funeral Home Hyde Park Pizzeria Kathman Electric Co., Inc. Krombholz Jewelers Kucia and Associates LLC Libby's Gourmet Desserts Locey, Cecil & Associates Madisonville Community Council

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### Parish Partners Gifts \$1,000 and above

Episcopal Church of the Redeemer, Cincinnati Episcopal Diocese of Southern Ohio

#### Gifts up to \$999

Christ Church Cathedral, Cincinnati Christ Episcopal Church, Dayton Christ Episcopal Church, Glendale Church of the Good Shepherd, Cincinnati Community United Methodist Church, Circleville Episcopal Church of The Ascension & Holy Trinity, Wyoming Forest Chapel United Methodist Church, Cincinnati Gloria Dei Lutheran Church, Crestview Hills, KY Indian Hill Church Our Lady of Sorrows, Monroe Presbyterian Church of Wilmington St. Boniface Church, Cincinnati St. George's Episcopal Church, Dayton St. James Episcopal Church, Cincinnati St. John United Church of Christ, Cincinnati St. John's Episcopal Church, Lancaster St. Mark Episcopal Church, Dayton St. Mark's Episcopal Church, Upper Arlington St. Paul United Methodist Church, Cincinnati St. Peter & St. Paul UCC, Cincinnati St. Philip's Episcopal Church, Circleville St. Simon of Cyrene Church, Lincoln Heights Stratford Heights Church of God The Society of the Transfiguration



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# ERH Preferred Customer Program Expands to Staff

It's time to share the fun. ERH residents have enjoyed an average discount of 10 to 20 percent at a variety of local restaurants and shops through the ERH Preferred Customer Program. To redeem the discount, residents simply show their Preferred Customer Program card to a participating retailer. Now, ERH staff will enjoy the same benefit with an ever-expanding merchant list. Additional information about the Preferred Customer Program can be found at episcopalretirement.com.

### Find great deals at these participating merchants:

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Please contact Amy Engelbrecht at (513) 272-5555 ext. 4265 or aengelbrecht@erhinc.com for more details.