

Spring
2010

linkage

Complimentary Copy

Marjorie P. Lee Jubilee Addition Completed

2009 ANNUAL REPORT

Overview, Donors,
Financial Report and
Ministry Report

ERH

Episcopal Retirement Homes

Janet Krieder (sitting),
Dick Adams (standing),
Erik Sams and Ginny Uehlin

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WE WELCOME YOUR COMMENTS!

The Linkage Editor
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LINKAGE IS AVAILABLE ONLINE!

To better serve you, Linkage magazine is available via e-mail and the Episcopal Retirement Homes web site at www.EpiscopalRetirement.com.

Linkage is a resource to address issues and interests of older adults, providing a link between ERH's programs and its service area. For more than 50 years Episcopal Retirement Homes has been a not-for-profit, financially sound organization dedicated to improving the lives of older adults through innovative, quality services based upon their values and delivered by highly experienced, deeply committed professionals.



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ON THE COVER:

Dick Adams (standing), ERH Board Member; Janet Kreider (sitting), MPL resident; Erik Sams, R. J. Bieschel Building Co.; and Ginny Uehlin, MPL Administrator. Photography by Tom Uhlman.

Deupree House Resident Turns the Commonplace into the Extraordinary

By Michael Perry
Photography by Tom Uhlman

Jack Fix is taking a walk through a woodsy area of Duck Creek Road, just outside of his home at the Deupree House. When he spots two large, rotted sections of an old sycamore tree, he sets them aside in a spot he might return to later.

"I may never use them," he says. "But it's a resource that sometime I might decide to do something with."

This is what Fix, 91, loves to do: Find an obsolete or discarded item and turn it into art. It can be some kind of wood, rusty railroad spikes, uniquely colored or shaped rocks, dead shrubbery. It doesn't matter.

As a product of the Great Depression, he has always had this philosophy: If you can make it, you don't have to buy it. And since he was 12, he has been creating art projects of all kinds.

His versatility showed in an art gallery displayed at the Deupree House through mid-February. Fix's work includes wood-carving, photography, acrylic painting, crewel embroidery, wire sculpture and rock sculpture.

The gallery is the brainchild of Activity Director Rochelle Dietz, who has a background in art education. She found that some Deupree residents have creative talents they're "humble and modest" about, so she decided to help them share the fruits of their talents with others.

The first exhibition, in August, featured the work of resident Dawn Wilson, a watercolorist.

"I'm trying to let them know other people would be interested in seeing their work," Dietz says. She's now planning creative workshops, starting with needlework and perhaps expanding to sketching and sculpturing.

**"I've never taken lessons,
... I read a lot just for
references."
— Jack Fix**



Jack Fix with some of his artwork

Fix's "art studio" is a study in the apartment he shares with Helen, his wife of 66 years and a former state representative and newspaper editor.

There is a small easel where a painting-in-progress rests. Fix's paint, brushes and pallet knife are nearby. He works just inside patio doors that allow for natural light to fill the room. Fix is working on a painting of the San Francisco Peaks and a meadow, using a photo from *Arizona Highways* magazine.



Peter the Fisherman, cherry wall hanging created in Oriental motif

"I've never taken lessons," he says. "I read a lot just for references."

Indeed, the bookshelves are filled with volumes about national parks, Britain, gardens, wildflowers, castles and landscapes. There's also a volume of *Techniques of the Artists of the American West*. But Fix's oldest resource is a how-to handicraft book published in 1931. It cost \$1, but for Fix it's been priceless. The book covers silverwork, tanning techniques, leather, celluloid, metal, woods and more.

The love of art runs in his family. Fix's grandmother produced charcoal portraits of animals and houses. His grandfather was a carpenter whose work was inspiring, and Fix is quick to show off a walking cane carved by his grandfather from blackwood that he says is probably 150 years old. Its design is exquisite. So is an assembly of hand-carved grapes, apples and bananas in a wooden bowl that was also created by his grandfather.

"I've been doing this for so many years; it's just part of what I do," Fix says. "Right now I'm finding painting fascinating. I could get back to more carving."

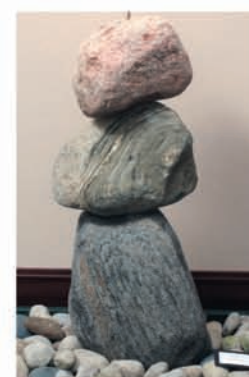
When he does, he'll head right to the Duck Creek woods to claim his chunks of that sycamore tree.

"The reason I just love Jack so much — and I think



Jack Fix at work in his home at the Deupree House

his artwork shows this — is he's so creative," says Laura Lamb, vice president of residential housing and healthcare at Episcopal Retirement Homes. "He just approaches life in a very creative, flexible way that makes him a joy to be around. You learn so much from him. Art is just one of the many ways he's still teaching the world." ■



Lady with a Shawl, made from found creek stones

Refresh Your Soul Conference 2010

Medicine, Religion and Health: Where Science and Spirituality Meet

Medicine, religion and health were on tap at the 2010 Refresh Your Soul conference, put on by Episcopal Retirement Homes' Parish Health Ministry.

The theme this year was particularly timely, as healthcare reform takes center stage, and more and more evidence surfaces as to the role spirituality can play in maintaining and improving physical and mental health.

More than 180 people turned out for the March 12-13 event at the Crowne Plaza Hotel in Blue Ash, which kicked off with a dynamic presentation titled "Winter Grace" by Rev. Maggie Sebastian, a highly respected speaker and journalist in the field of spirituality and aging.

She offered a dynamic presentation on the importance of spiritual experiences, and traditions for health and wholeness in the latter seasons of life.

Dr. Harold G. Koenig, one of the country's leading experts on the study of religion and health, delivered the keynote address. Koenig is the founder and former director of Duke University's Center for the Study of Religion, Spirituality and Health, and is founding co-director of the current Center of Spirituality, Theology and Health at Duke University Medical Center.

His speech on "Medicine, Religion and Health: Where Science and Spirituality Meet" provided findings on the integration of the three topics, an analysis of what that evidence means, and practical recommendations for integrating scientific and spiritual care. ■

— COLLEEN WEINKAM

SPONSOR RECOGNITION

We would like to thank the following sponsors for their generous contributions:

Platinum Level - \$5,000+

The Episcopal Diocese of Southern Ohio
The Rt. Rev. Thomas E. Breidenthal

Silver Level - \$1,000-\$2,499

Episcopal Church of the Redeemer

Dr. Koenig shared research that illuminates the influence spirituality has on our mental and physical health. He reviewed the historical connection between spirituality and health as well as assisting faith-community nurses and health ministers to explore and identify ways to reinforce this connection.

— Rhonda Johnson, BSN, RN,
conference co-chair

Marjorie P. Lee JubiLee Addition **NOW OPEN!**

By Michael Perry
Photography by Tom Uhlman

Everybody is raving about the teamwork. From the residents and staff, to the designers and fund-raisers, to the architects, construction team and landscape artists.

"Talk about the ultimate collaboration," said Laura Lamb, vice president of residential housing and healthcare at Episcopal Retirement Homes. "That's what you want."

When the renovated Marjorie P. Lee debuted Feb. 2, it was the result of years of planning, plentiful partnerships and the JubiLee fundraising campaign. Among the new amenities of the JubiLee addition:

- *On the first floor:* A swimming pool, locker rooms, Jacuzzi, massage room, fitness center.
- *On the second floor:* A new Archea dining area (indoors and outdoors), a private Archea dining room and a new walkway and garden outside.
- *On the third floor:* An event center for meetings, classes, programs, activities, parties, movies (there's a big screen-drop-down TV) or playing the piano. There's a new bar (a gift from the MPL auxiliary) and sitting areas with couches and chairs, books and a fireplace.

"I think everybody is very pleased," Janet Kreider, a 19-year resident at Marjorie P. Lee who was on the steering committee, said just days after the Grand Opening. "We've had a beautiful week. It's been a lot of fun. We certainly enjoy the new Archea dining room, and we've had activities in the new event center." According to Kit Duval, JubiLee Campaign Chair and ERH Board Member, "The MPL addition provides improved quality of life for residents — better communication opportunities and healthy lifestyle choices."

The process started in 2000 with the Crystal Ball team, made up of staff and residents and formed to help the aging facility determine what was needed to meet the needs of residents in future years.

A marketing firm from California was hired in the late 1990s to survey current and prospective residents about what would be expected at MPL within 10 years.



New event center



New cozy sitting area

THE TEAM

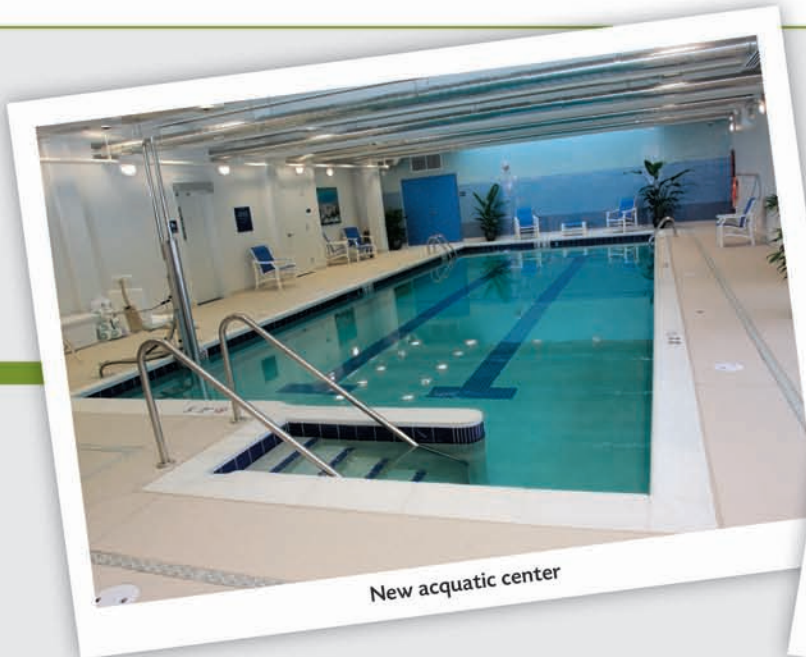
Architects: SFCS Inc., Roanoke, Va.

Construction, Phase I: R.J. Beischel Building Company, Cincinnati

Construction, Phase II: Ridge Stone Builders & Developers, Perrysburg, Ohio

Designer: Design Collective, Inc., Baltimore

Landscape designer: Bentley Koepke Inc., Cincinnati



New aquatic center



New living area

What the Jubilee committee heard loud and clear was the desire for a more flexible eating schedule, multiple dining locations, a wellness and aquatics center, and an events center that would be far more than a simple activities room.

"In order to be able to serve people, we needed to improve our amenities," said Ginny Uehlin, administrator of health services.

In 2008, an additional \$1 million fund-raising campaign was launched to supplement what was already attained. The goal was met by the end of that year.

"We reached it in a very short term,"

said Lori Asmus, Jubilee campaign director and donor relations manager for Episcopal Retirement Homes. "The majority of the funds came from board members, residents and family members and a few gifts from the greater community. We also received some foundational support which was helpful."

Phase II of the project, which started Jan. 4 of this year, is expected to be completed no later than this August. That will include:

- The current dining area becoming new apartments and a crafts room.
- The Shaw private dining room being

combined with the resident-lending library as the new Shaw Dining Room.

- The library moving from the second floor to the first floor.
- New apartments being converted to one-bedroom from studios.
- The therapy room moving from the basement to the first floor.

Since Phase I ended, Lamb has heard several residents saying, "This is what we asked you to create and you gave it to us."

Which is exactly what the staff wanted to hear. ■

THE BLESSING & CELEBRATION OF JUBILEE



The Rt. Rev. Briendenthal blessing the new addition

Residents enjoyed the celebration's refreshments



L to R: Tom Kahle, Laura Lamb, The Rt. Rev. Briendenthal, Steve Cuff, Doug Spitler

Dear Friends,

In 2009, Episcopal Retirement Homes has continued to thrive despite the unnerving backdrop of a struggling economy and challenging marketplace. We continued our efforts to enhance our services for elders through new development and major renovations. And ERH has strengthened its financial position through careful and prudent management of our operations and financial performance. More than ever, this year has proved that no matter what the circumstances, ERH is committed to providing exceptional services for seniors, and we will not settle for anything less.

Some of the accomplishments of the last year include:

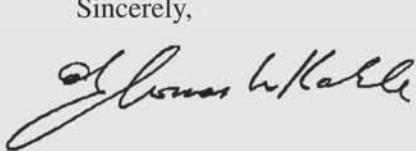
- Opening the innovative Deupree Cottages, offering the best in skilled nursing support and the freedom for elders to live life on their terms
- At Marjorie P. Lee, completing the first phase of the JubiLee project, including a new event center, aquatic center and dining room
- Completing a major renovation of Cambridge Heights, affordable housing with services
- Securing approval for tax credit funding for St. Paul Village I and beginning to plan improvements
- In a challenging credit market, completing \$30 million of refinancing on favorable terms

Despite challenging times, the joy of serving seniors has continued to shine through this past year. As always, we are grateful for the support of our many donors and volunteers whose commitment of time, talent and treasure permits us to provide compassionate, exceptional services for older adults. Perhaps the best way to truly express the accomplishments you have helped us achieve is to read of what happens every day at our communities. We will leave you with a note from the daughter of a Marjorie P. Lee resident.

"I could never have asked for or expected the kind of care that she (her mother) received. It was always professional, of course. But it was so very much more. It was respectful, and it was loving. And while I frequently let them know that I was tearing my hair out when she rejected what seemed to me to be the best for her, they listened to me, they laughed with me, and they sympathized. But they never once ever allowed her dignity to be compromised.

"I would so like to name names, but there are far too many, and I wouldn't want to miss anyone. But I must say that the staff at every level has been extraordinary... from the girl who moves carts of food trays to those who clean rooms to the dining servers to every single aide and nurse to the receptionists and clergy and security... When my mother breathed her last breath, a custodial staff member cried on my shoulder, a young male nurse held me in his arms, tears in his eyes... everyone grieved with me. This place is unique, and I am so very, very grateful."

Sincerely,



Thomas W. Kahle
Chair, ERH Board of Directors



R. Douglas Spitler
President and CEO



New Archea dining room at Marjorie P. Lee

2009 Overview and Financial Report

Condensed Balance Sheet for the Years Ending December 31, 2009 and 2008

Assets	2009	2008
Current Assets	10,298,000	5,155,000
Marketable Investments	25,282,000	37,128,000
Property & Equipment (net)	70,241,000	60,085,000
Deferred Bond Issue Costs	2,226,000	1,646,000
Beneficial Interest in Endowment	18,961,000	17,046,000
Other Assets	926,000	802,000
Total Assets	127,934,000	121,862,000

Liabilities

Current Liabilities	5,476,000	5,999,000
Unamortized Entrance Fees	15,224,000	14,841,000
Long-Term Debt	37,381,000	37,077,000
Other Liabilities	940,000	1,428,000
Total Liabilities	59,021,000	59,345,000

Net Assets

Permanently Restricted	20,674,000	18,758,000
Temporarily Restricted	412,000	380,000
Unrestricted	47,827,000	43,379,000
Total	68,913,000	62,517,000
Total Liabilities & Net Assets	127,934,000	121,862,000

This condensed financial information was extracted from the 2009 Episcopal Retirement Homes, Inc. financial statement, a copy of which is available in the president's office.



Board Member Kit Duval and Father Steve Cuff

Condensed Statement of Revenue and Expenses for the Years Ending December 31, 2009 and 2008

Operating Revenue	2009	2008
Service Fees	19,515,000	19,448,000
Amortization of Entrance Fees	636,000	676,000
Investment Income	563,000	1,178,000
M.P. Lee Endowment Income	1,132,000	1,099,000
Other Revenue	1,421,000	902,000
Total Operating Revenue	23,267,000	26,303,000

Operating Expenses

Salaries and Wages	9,759,000	9,364,000
Payroll Taxes and Fringe Benefits	2,675,000	3,669,000
Purchased and Professional Services	731,000	996,000
Medical and Other Supplies	2,100,000	1,755,000
Food	1,048,000	1,038,000
Utilities	1,464,000	1,541,000
Interest	1,871,000	3,153,000
Depreciation	3,597,000	3,153,000
Other Expenses	1,895,000	1,894,000
Total Operating Expenses	25,160,000	24,290,000

Net From Operating	(1,893,000)	(987,000)
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Non-Operating Revenue

Change in Swap Value	407,000	495,000
Contributions	555,000	1,109,000
Realized Capital Gains (Losses)	(423,000)	(95,000)
Unrealized Capital Gains (Losses)	(4,547,000)	(8,868,000)
Impairment on Land for Investment	—	(3,471,000)
Other	39,000	(515,000)
Master Plan Development & Strategy	(167,000)	(131,000)
Change in Beneficial Interest	1,915,000	(7,532,000)
Partner Contributions	1,416,000	452,000
Total Non-Operating Revenue	(8,259,000)	(19,546,000)
Total change in Net Assets	6,396,000	(20,533,000)

2009 Ministry Costs



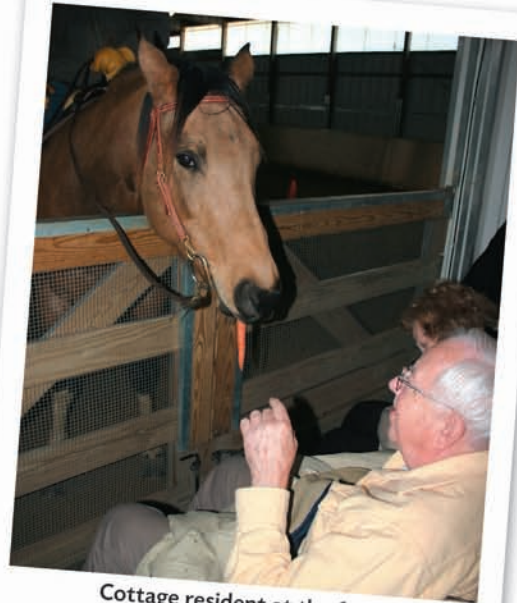
Volunteers at "Music of the Night"

Total Individuals Served/ Contacts made in 2009

32,392

Parish Health Ministry*	31,000
Meals on Wheels clients	450
Affordable Housing	465
Independent living	282
Assisted living	42
Nursing care	153

* Contacts made through health screenings, referrals and other activities



Cottage resident at the farm

2009 Contributions and Legacy Commitments

A. Good Samaritan Mission annual gifts	\$443,000 (20%)
B. Special and legacy gifts	\$1.8 million (80%)
Total	\$2,243,000



Canterbury Court residents playing pool

2009 Community Partnerships

As part of its mission to improve lives, ERH actively develops and supports ministries that benefit thousands of individuals each year. For a complete listing of the 2009 donors, please visit www.episcopalretirement.com. To request a copy of the donor list in print, please contact the Fund Development office at (513) 272-5555, ext. 4292.

ORGANIZATIONAL PARTNERS

Partner's Circle \$10,000 - \$19,999

Deupree Community Auxiliary
Episcopal Diocese of Southern Ohio
Marjorie P. Lee Auxiliary

Builder's Circle \$5,000 - \$9,999

PNC Financial Services Group

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Ohio Valley Foundation, Fifth Third Bank, Agent

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CareSource Foundation
Rindsfoos Foundation

Trustee's Circle \$2,500 - \$4,999

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Benefactor's Circle \$1,200 - \$2,499

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Partner's Circle \$10,000 - \$19,999

Episcopal Diocese of Southern Ohio

Builder's Circle \$5,000 - \$9,999

Episcopal Church of the Redeemer

Trustee's Circle \$2,500 - \$4,999

St. Barnabas Episcopal Church, Montgomery

2009 Donor Profiles

The many generous donors who contribute to ERH are as varied as the Episcopal Retirement Home's residents themselves. In the following profiles, you will get to know a social worker, a pastor, a former banker, a business owner, residents, their families and others who represent the many donors who have made gifts to ERH a high priority.

PARISH PARTNERS continued

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St. Mark's Episcopal Church, Upper Arlington
St. Paul's Episcopal Church, Oakwood

Patron's Circle \$750 - \$1,199

Calvary Episcopal Church, Clifton

Samaritan's Circle \$300 - \$749

Christ Episcopal Church, Dayton
Hyde Park Community U. Methodist Church
St. James of the Valley Catholic Church,
Wyoming
St. Michael Catholic Church, Sharonville
St. Timothy Episcopal Church, Anderson
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Zion United Church of Christ, Norwood

Donor's Circle..... Gifts up to \$299

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Knox Presbyterian Church, Cincinnati
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The Society of the Transfiguration
The United Methodist Church
Trinity Episcopal Church, Hamilton
United Theological Seminary
Women Of Grace Episcopal Church, Cincinnati

ECONOMY ENCOURAGES GIVING

JACK AND LOIS NEBERGALL moved into Deupree House in April 2009. "It's a really great place to live," Lois said. When asked why they donate to the Good Samaritan Mission, Jack said, "It is the thing to do. I know other residents give and thought we should participate." In June 2009, when Jack considered his gift to the Good Samaritan Mission, the Dow Jones was under 10,000. With the uncertainty in the market, Jack committed to giving \$500 immediately and an additional \$500 if the Dow went over 10,000. In October, Jack sent an additional check.



A LEGACY OF HEALING

MARILYN KREHBEIL MCBRIDE enjoyed living at Deupree House for many years. She was remembered by staff as someone who valued living independently and restoring function to elders. When Mrs. McBride died, ERH was blessed with a gift from a charitable trust she arranged in support of one of her favorite programs, therapy services at Deupree. Mrs. McBride's legacy gift will be used to purchase several different pieces of new equipment that will address mobility, balance and pain management in elders.



Michael demonstrates the Bionex to MPL Resident, Bob LaShelle



BEAUTIFUL NEW BEGINNINGS

MISS FRANCES R. LUTHER lived all of her life in Hyde Park, so when the time came to move to a retirement community, she chose the Marjorie P. Lee so she could continue to live in the neighborhood she so dearly loved. Miss Luther greatly appreciated the love and care she received while at Marjorie P. Lee, and was very supportive of the organization. Over the years, her family's foundation, the H.B., E.W., and F.R. Luther Charitable Foundation, Fifth Third Bank Agent, has generously supported ERH, and particularly the Marjorie P. Lee community. Some of the foundation's gifts include the Resident Art Center at Marjorie P. Lee, funding to train the ERH staff in Person-Centered Care and, most recently, the foundation has funded the much-needed renovation of the Marjorie P. Lee Beauty Shop.

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2009 Donor Profiles



MONTHLY GIFT SHOWS GRATITUDE

VIOLET HAYDEN, who prefers to be called Jackie, moved to Canterbury Court, ERH's apartments for low-income older adults in West Carrollton, Ohio, in 2002 from Virginia, to be closer to her son who lives in the Dayton area. Shortly after moving, Jackie realized just how special Canterbury Court was as a community. She grew to love the services and amenities that were offered to enhance the lives of the residents. "I really enjoy the people who live here and the staff is absolutely wonderful," she said. Jackie, while on a

fixed income, donates to Canterbury Court, giving \$10 each month for the past seven years. Jackie said, "Canterbury Court and the Lord have blessed me and giving comes back to further bless and help our lives become better."

STAFF DONATES TIME AND TALENT

For more than 7 years, **EVELYN ROEHRIG** has been a Licensed Social Worker at Marjorie P. Lee (MPL). At her previous job with a for-profit organization, she saw that money was the bottom line. "At ERH, the bottom line is people. The Good Samaritan Mission helps make residents' needs be the bottom line rather than money," Evelyn said. Evelyn, and many staffers like her, donates a portion of her pay each pay period to the Good Samaritan Mission, to benefit the residents we serve. "I believe it is our responsibility to donate," she said. "Like the Good Samaritan story in the Bible, we have to stop along the way and take care of others." In 2009, donations from ERH staff totaled more than \$40,000.



CELEBRATING MILESTONES

In honor of **CAROLINE HAAS'S** 100th birthday, her children gave Marjorie P. Lee a beautiful new fireplace for the expansion project. Mel, one of Caroline's children, shared, "Mom said no gifts, yet all us kids wanted to do something special for her. We are so pleased that Mom is at Marjorie P. Lee. It gives me comfort to know she is well cared for." The fireplace is a wonderful new addition, where residents can gather and visit with one another.



Fred, Mel and Susan Haas reveal a gift in honor of Caroline's 100th birthday.



Janet Simpkinson, John Simpkinson and Fred McGavran with the portable communion kit.

HONORING LOVED ONES

As plans were being made for the new skilled nursing facilities, Deupree Cottages, a portable communion kit was needed to serve these residents. **FRED MCGAVRAN**, a candidate for the diaconate at Marjorie P. Lee (MPL), knew just whom to ask for help.

For many years, Fred visited Charlotte Hoffman Kinsley once a month to deliver communion. "Charlotte had a lively and discerning mind and was always filled with life," Fred said.

Fred approached Charlotte's nephew, **JOHN SIMPKINSON**, and his wife, **JANET**. John and Janet have long been associated with Marjorie P. Lee as John's mother and father lived at MPL in the 1970s, and John cared for Charlotte as her only relative who lived in town. John and Janet readily agreed to donate money to purchase the portable communion kit as a way to memorialize Charlotte, and asked other family members to donate as well. Donations were also made by Carol Anslow (Charlotte's neice), Dr. Charles Simpkinson (nephew), and daughter, Kathy Kindelan. Fred McGavran also made a gift. The plaque on the front of the communion kit reads, "In Memory of Charlotte Hoffman Kinsley, 2009."

"This is a nice way to commemorate my aunt," John said. "The building might morph and change, but this communion kit will be around for 100 years for the residents."

A LIFETIME OF SERVICE

For many years, **BROOKS JULIAN**, a respected banking and community leader, played a significant role in improving the lives of older adults by serving Episcopal Retirement Homes as a member of its Board of Directors, Foundation Board, and the Central Ohio Advisory Board. Brooks was a modest, unassuming, down-to-earth gentleman whose faith and family were most important to him. When his wife, Helen, developed a terminal illness, he chose to have her care delivered by a former ERH facility. Doug Spittler, ERH CEO said, "I believe that the compassionate care that Helen received led to Brooks' continued interest and support for ERH's ministry." Brooks passed away last May at the age of 91. Because of Brooks' gratitude for the care that his beloved Helen received, he remembered ERH with a bequest gift in memory of her.



BUSINESS WITH HEART

As a family-run business, **RIDGESTONE GENERAL CONTRACTORS** has a strong commitment to giving back, through their special building talents. Recently, Ridgestone gave beautiful cabinetry, several large screen TVs and two new fireplaces to ERH. These gifts are helping to make our new Deupree Cottages and Lee Gardens inviting homes for elders. Brian Gruber of Ridgestone shared, "It is an incredible pleasure to work with the people of ERH. We've seen both sides as a contractor and a customer. I'm thankful that my grandparents are now residents and a part of the amazing care and love this organization has for older people."



LEADERSHIP IN ACTION

The **REV. BRUCE SMITH**, Associate Rector of St. Mark's Episcopal Church in Upper Arlington, Ohio, has been a long-time supporter of ERH. He currently serves as the Chair of the Central Ohio Advisory Board. Fr. Smith became involved with ERH along with his wife, Susan, when several of her family and friends moved to Deupree House. "I have always believed in the mission of quality senior housing and supporting organizations that live out that mission and ministry, and ERH does that very well," Fr. Smith said. He has indeed shown his support by pledging a gift each month since 1997 and recently became a member of the Living Legacy Society by including a bequest gift to ERH in his will.

VOLUNTEERS GIVE TIME AND MONEY



MPL Auxiliary members with the new portable bar for the event center.

THE MARJORIE P. LEE AUXILIARY is comprised of community members who volunteer their time to improve the lives of residents at MPL through fund-raising and social events. Auxiliary members work tirelessly to enhance residential life — from founding and managing the Corner Store, to organizing semi-annual rummage sales, to hosting festive

social activities like the Woodland Mound Picnic. The Auxiliary's contributions are felt daily by the residents of MPL. In 2009, the MPL Auxiliary made a generous financial gift to purchase a custom-designed portable bar for the new Event Center. This gift reflects the Auxiliary's deep commitment to providing hospitality and fellowship to the residents of Marjorie P. Lee.



GIFTS OF REMEMBRANCE

For the 11 years **DOTTIE COWAN** has been a resident of Marjorie P. Lee, she has made 57 gifts in memory of others. "Giving memorials is my way of letting the family and friends know that the life of their loved one has touched my life deeply," she said. "My relationship has not ceased but simply turned a page." The Good Samaritan Mission is Dottie's chosen charity because it "is a good feeling to know that everyone will be taken care of in their time of need."

2009 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 those who are at risk of being underserved.

If you would like to help build our legacy for 2010, your gift — financial or otherwise — is always appreciated. For more information on how you can help shape Episcopal Retirement Homes' ministry, contact Maureen Gregory at (513) 272-5555 ext. 4292, or visit our web site at www.episcopalretirement.com.

FINANCIAL ASSISTANCE

Episcopal Retirement Homes (ERH) assists residents when their savings have been depleted by providing either direct subsidy or tapping into the Partners in Care Fund, which helps seniors pay for items such as eyeglasses or hearing aids not covered by insurance. The fund also benefits ERH staff members facing financial emergencies. With the reality of a struggling economy, financial assistance this past year has gone beyond monetary value by bringing hope to those facing hardship. After receiving assistance, one staff member commented, "ERH has been such a blessing to me. I've always tried to have savings on hand, but with the economy the way it is and then facing an unexpected family emergency, ERH provided me with assistance that not only helped me through a hard time financially, but gave me encouragement that everything was going to work out."

2009 FINANCIAL ASSISTANCE

Independent and assisted living (10 residents).....	\$279,321
Medicaid-eligible nursing (41 residents)	\$771,357
Meals on Wheels (12 clients)	\$9,916
Partners in Care Fund (34 residents).....	\$14,165
Staff Emergency Fund (7 staff)	\$3,503
Total	\$1,078,262

AFFORDABLE HOUSING

At each of our affordable housing communities (Canterbury Court, Cambridge Heights and St. Paul Village), ERH goes above and beyond rudimentary H.U.D. requirements by offering services and amenities not usually offered in similar H.U.D. facilities. A testament to this is the recent renovations to Canterbury Court and Cambridge Heights, and future renovation of St. Paul Village.

Through the years, ERH has worked to keep each of the communities relevant with new fitness rooms, gardening areas and Wii systems. If you think living in affordable housing means going without, just ask one of our residents.

2009 AFFORDABLE HOUSING

Residents served.....	465
Cost.....	\$79,360



Resident and staff using the new Canterbury Court hair salon

COMMUNITY OUTREACH

Although ERH's mission is committed to helping seniors, ERH goes above and beyond by serving the children of Martin's Ferry, Ohio, each year at Christmastime. During that special time of year, ERH looks beyond its own mission to give staff and board members the opportunity to collect toys and money for the children of low-income families. Besides the Martin's Ferry Children

Outreach, the best example of ERH's community outreach can be seen in the non-professional lives of ERH's employees, which are filled with the giving of their time to schools, hospitals and other nonprofits.

2009 COMMUNITY OUTREACH

Outreach programs	42
Martin's Ferry toy donations	350
Martin's Ferry monetary donations.....	\$1,704



Staff with toys for the Martin's Ferry toy drive

VOLUNTEERS

Volunteers are the glue that holds ERH together and brings out the best in all of us. Gene Todd, a dedicated volunteer at Episcopal Retirement Homes (ERH), regularly volunteers at Canterbury Court in West Carrollton and holds computer classes for residents at Marjorie P. Lee in Hyde Park. Even with his very busy schedule, Todd took it upon himself to apply for a \$250 grant from Wal-Mart, where he is currently employed. Todd was awarded the grant for Canterbury Court and was celebrated not only for his volunteer hours, but for caring enough to pursue other ways to help ERH communities.

2009 VOLUNTEERS

Hours	27,227
Auxiliary Members.....	131
Auxiliary Donations.....	\$21,750

COMMUNITY EDUCATION

With the breadth and depth of knowledge and expertise about the aging population, ERH has been identified in Ohio as an expert in the field of aging. The best way to use our expertise and be a resource to others is to explore many different outlets to educate others about aging. As a practical tool, ERH provides a booklet called "Planning Ahead," which walks people through important steps such as writing a will, documenting medications and planning a funeral. Through education, not only can seniors and their families be more prepared to deal with what's to come, but a future generation of students can be trained to care for our elders in a knowledgeable and effective way.



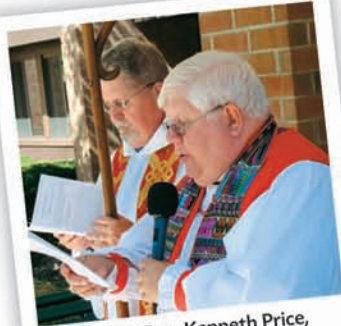
Xavier student intern Megan Kron with Doug Spitler

2009 COMMUNITY EDUCATION

Interns.....	4
Programs.....	36
Participants.....	874

CHAPLAINCY

ERH provides each of its communities with chaplains who serve the spiritual needs of the residents. The job of the chaplain can be a challenging one since residents are often dealing with life-altering events and serious issues, such as life and death. With these challenges, though, comes a 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. This past year our chaplains have been able to walk with residents through building renovations, economic hardships, the death of loved ones and friends, and even welcomed new life with the birth of grandchildren and great-grandchildren. ERH truly values the important work their chaplains do in the spiritual life of the ERH family.



The Rt. Rev. Kenneth Price, Cambridge Heights' blessing

2009 CHAPLAINCY

Worship Services.....	253
Bible Studies.....	227
Counseling Sessions.....	865

PARISH HEALTH MINISTRY

ERH ministers to people throughout Southern Ohio and Northern Kentucky by offering a Parish Health Ministry (PHM) program. PHM partners with various churches offering health-care screenings, programs and information to those living in the region. This year, PHM started a program called "Walk to Bethlehem." This program was designed to increase the physical, spiritual and emotional health of participants. This "imaginary" trip to Bethlehem is accomplished by participants logging their own walking miles per week. The miles of all participants are totaled, with the goal of accumulating enough miles per congregation to reach Bethlehem by Christmas. Congregations embraced this program and took the trek to Bethlehem with great enthusiasm. One congregation reported they reached Bethlehem much earlier than Christmas, and were excited to discover where else they could travel as a congregation.

2009 PARISH HEALTH MINISTRY

Congregations.....	77
Contacts.....	31,739
Volunteers.....	937
Hours of Service.....	17,676
Cost.....	\$212,774

MEALS ON WHEELS

ERH serves homebound seniors throughout Greater Cincinnati through Deupree Meals on Wheels (MOW). Although providing nutritious food is the primary focus of this ministry, the contacts made are often the only social contact many seniors experience on a daily basis. Recently, Deupree Meals on Wheels was featured on a local news station for continuing to serve our seniors during a snow storm. Although viewers were very impressed with the dedicated volunteers who deliver in all types of weather, the commitment to seniors comes naturally to these volunteers. They simply could not fathom leaving people without their meals, even at the expense of their own comfort in cold and icy conditions.



Meals on Wheels volunteer and client

2009 MEALS ON WHEELS

Meals.....	94,925
Clients.....	450
Neighborhoods.....	14



Episcopal Retirement Homes

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Living Legacy Society

Individuals giving through their estate

Lori and David Asmus
Mrs. Marjorie Austin
Carol and Corning Benton
Mrs. Ellen A. Berghamer
The Rt. Rev. and Mrs. William G. Black
Miss Virginia A. Bohn
Mr. and Mrs. Jon B. Boss
Anna K. and George G. Carey IV
Mr. and Mrs. Donald Y. Carpenter
Joy and Chet Cavaliere
Mrs. Olga S. Clark
Mr. and Mrs. A. Burton Closson, Jr.
Miss Irene E. Ehrmann
Mrs. Ruth Ferriss
Jack and Helen Fix
Mary Beth and Jim Foxworthy
Dr. and Mrs. James M. Garvey, Jr.
Mrs. Morton B. Gusweiler
The Rev. Canon Jim Hanisian
and Alex Chesson

Mrs. Elizabeth T. Hatcher
Mr. and Mrs. Charles B. Hedrick
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The Rev. and Mrs. William E. Rathman
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Mrs. Mamie E. Rooks
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Mr. and Mrs. James H. Scott
Elizabeth C.B. and Paul G. Sittenfeld
The Reverends Bruce Smith and
Susan Warrenner Smith
Mrs. Charlotta B. Smith
Mrs. Kay Smith
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