### Dear Friends,

If I had only one word to describe 2023, it would be "rebuild." In all aspects of ERS, there are threads of rebuilding in 2023: Our residents were re-energized and returned to the full swing of their lives. We re-established our teams after the pandemic. Our staff restored services that were on hold due to staffing challenges. We rebuilt stable occupancies to ensure financial health. No matter the subject, we know that recreating takes more energy than maintaining. Therefore, it is not surprising to anyone who lived at or worked with ERS that 2023 was a difficult yet rewarding year.

Our Annual Report for 2023 is a testament to ERS's resilience. We are fortunate to be a strong organization that has weathered the storms of COVID-19, rising interest rates, and a hardened labor market. The tenacity of our residents, staff, and partners to recreate, restore, and rebuild has been remarkable. The annual report on the following pages not only highlights our financial position but also shares success stories from the year, inspiring us all for the future.

• 2023 presented ERS with financial challenges, primarily due to the record number of resident transitions through our continuum of care. These transitions have strained our community relations teams and our budget. However, despite these challenges, our team welcomed a record number of residents in 2023. The pressure we faced also helped us identify numerous opportunities for improvement.

• Our staff are at the heart of all we do. In 2023, we invested significantly in our staff wages to ensure we could recruit and retain top talent to care for our residents. Many teams had significant openings. In this report, we have highlighted how we recreated our Deupree House dining team. This team represents many of our teams throughout the organization.

• We were blessed to have several tax credits awarded for some Affordable Living communities. In 2023, we had three communities under development – one new community and two projects to restore existing communities. Read about our new community, Pedretti Place, and the next chapter on our Wilmington & Blanchester campuses.

• ERS made headway in rekindling our desire to grow in the Middle Market by making our site in Batavia, Ohio "shovel-ready" while we wait for bank terms to equalize. The greatest need for older adults in the future is for those who would be served in a community like Batavia. They are "stuck" in the middle with too many assets for an Affordable Living community, but not enough for a continuing care retirement community.

We are deeply grateful for the unwavering support and steadfast leadership of those who serve on our Boards and Committees. Thank you to every resident, family member, volunteer, donor, and partner for your invaluable support of ERS as we have rebuilt. With you at our side, we are committed to excellence in aging services and senior living communities.



Sincerely,

LeuraRhamb

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.

**33,145** Individuals served through ongoing services & support or contacts by people seeking information/education



#### ERS Ministry Reaches Across the Tri-State in 2023

## 2023 Overview and Financial Report

The financial information below is for the year ending December 31, 2023. This financial information is based on audited financial data compiled by the staff of Episcopal Retirement Services. Additionally, this information was subjected to independent external audits with final reports for both 2023 and 2022 available upon request.

### Condensed Balance Sheet

#### As of December 31, 2023

Assets	2023	2022
Current Assets	\$25,304,225	\$26,053,001
Investments and Reserves	\$38,608,039	\$36,267,261
Fixed Assets	\$233,381,376	\$238,686,643
Beneficial Interest in Endowments	\$35,559,658	\$32,228,658
Other Assets	\$5,734,437	\$6,166,728
Total Assets	\$338,587,735	\$339,402,291

Liabilities	2023	2022
Current Liabilities	\$16,834,159	\$15,702,905
Unamortized Entrance Fees	\$41,151,224	\$35,570,965
Long-Term Debt	\$92,752,670	\$97,912,668
Other Liabilities	\$290,023	\$245,115
Total Liabilities	\$151,028,076	\$149,431,653

Net Assets	2023	2022
Total Net Assets	\$187,559,659	\$189,970,638
Total Liabilities & Net Assets	\$338,587,735	\$339,402,291

#### **Condensed Statement of Revenue and Expenses** *For the year ending December 31, 2023*

	2023	2022
Operating Revenue	\$57,697,480	\$53,288,115
Operating Expense	\$(72,440,059)	\$(67,561,388)
Net from Operations	\$(14,742,579)	\$(14,273,273)

	2023	2022
Non-Operating Revenue (Expense)	\$8,791,748	\$1,217,660
Total Net Loss	\$(5,950,831)	\$(13,055,613)

### 2023 Contributions and Commitments

**\$907,004** Good Samaritan Mission Gifts and Grants

\$352,041 Realized Planned Gifts in 2023

### \$1,376,352

Capital Gifts and New Programs The Good Samaritan Mission Fund

\$2.79 Million Total Ministry Costs

**\$1.15M** Residential Financial Aid

\$1.26M Affordable Living by ERS

\$241,807 Spiritual Care

\$60,009 SAIDO Assistance Fund

\$39,267 The Staff Assistance Fund

\$34,364 Volunteer Coordinators

\$10,945 Community Outreach programs

\$5,015 Partners In Care Fund

**\$0\*** Deupree Meals On Wheels

\*The Meals On Wheels program experienced growth in meals, growth in clients, costs and staff levels were maintained while reimbursement increased. Therefore, 2023 ministry costs were \$0. Ministry for residents or through ongoing support

4,221 People served as residents or through ongoing support

1,996 Affordable Living Residents

589 Deupree Meals On Wheels Clients

521 Skilled Nursing Care Residents

360 Independent Living Residents

99 Personal Care Residents

146 Middle Market Residents

75 Living Well Senior Solutions Clients

7 Pete's Eats Clients

315 Swipe 'N' Dine Registrants

143 Student Educational Experience Ministry through community outreach

28,924 Number of contacts by people seeking information/education

41,401 Linkage Online Blog Views

777 Episcopalretirement.com Downloads

2,478 ERS Center for Memory Support & Inclusion Contacts

2,500 Community Outreach Education Contacts

Growth in Affordable Living by ERS

Number of Apartments

2021 2023

2018

1,718 1,775 1,832 1,833

1,527

873

Years 2007 2008- 2010- 2013 2014 2015 2016- 2019 2020- 2022-

568

215 383 401

2009 2012

# A New Era for Deupree Dining

By Caroline Puryear



(L-R) Pete Juszczyk, Sam Gillivan, Sofia Aveyard, Eugene Gaines, Madison Daly, Eric Graham, Sr., Rodney Nixon, and Garet Aveyard

At Deupree House, dining is as busy as ever, thanks to the dedicated culinary team that ensures residents have access to a top-notch dining experience. However, navigating the service industry post-COVID-19 was not easy according to Dining Services Director Pete Juszczyk and Executive Chef Sam Gillivan. As pandemic restrictions eased and the world adjusted to a new normal, a rough labor market proved it difficult to replace the staff they had lost. This lef them to make difficult decisions about service to residents. "The biggest focus was dayto-day operations to make sure we were fulfilling the residents' expectations," Juszczyk said. "We still strived every day with our commitment to serve residents."

Gillivan, who oversees daily operations alongside Juszczyk, explained that at the height of the culinary shortage, it was just the two of them. This resulted in a brief shift to take-out meals, delayed reopening of services such as Grille 39, the casual counterpart to the traditional dining room, and a popular employee dinner take-out program.

However, after three years, they now have a full culinary team. "We opened up the dining room gradually," Gillivan explained, saying that residents saw signs of hope when the traditional dining room returned to a full à la carte menu.

The residents were thrilled when they heard Grille 39 was reopening for lunch service. A favorite, the Grille is an extension of the traditional dining room offering a casual menu of soups, salads, and burgers. "Everyone has been very welcoming to it," Deupree House resident

Pat Donaldson said. "It affords us another option."

Grille cook Eric Graham noted that it has also served as a new social meeting place. "They'll come down here and play cards," Graham laughed. He explained that, for many residents who moved in during the pandemic, Grille 39's opening has allowed them to meet new neighbors and create connections with each other and employees.

Grille 39 opened for weekday lunch and dinner services in June. Juszczyk said the team aims to include weekend service by the end of Summer 2024 once they have a full server team. "We are excited to restore the services we had prior to the pandemic," Juszcyzyk said.

Through a popular take-out program, staff members can also take home a delicious meal for their families at a discounted rate. "They can take care of themselves and those in their life," Juszczyk shared. "It's so convenient."

As for the future, Juszcyzyk and Gillivan both expressed excitement for new opportunities. "I can do the fun part of my job now," Gillivan exclaimed. In April, he hosted the first Texas Barbeque Extravaganza to introduce residents to a new era of dining at Deupree. Residents enjoyed coming together to partake in delicious food, laughter, and comradery that had been missing from the dining room for far too long.

"The residents are so appreciative, that makes us want to come to work," Eric Graham said with a smile. "Going forward I just want us to keep prospering."

## Living Well Senior Solutions Snapshot

By Megan Bradford



Front Row (L-R) Betsy Babb, Kathy Braun, Peggy Slade-Sowders Back Row (L-R) Susan Miller, Mindy Horgan, Margaret Saxton, Sarah Shaffer

Serving as one of ERS's outreach ministry programs, Living Well Senior Solution (LWSS) is a care management service for older adults in need of additional support in navigating the healthcare system and their care needs both within the ERS network and in the broader community. For over 16 years, Peggy Slade-Sowders has served as the program's Director. Emulating ERS's Core Values and Ways of Working, Peggy's dedication to her clients and support of her fellow team members has created a team which is equipped to serve their clients in a personcentered way, focusing on what matters most to each individual. Peggy describes the team as, "An extraordinary Care Management and Concierge team that is dedicated to advocating for quality care, informed decision making, and self-determination."

#### Making Dreams Come True

In the spring of 2023, a LWSS client shared with her Care Concierge that she was worried she wouldn't be able to travel to the Adirondacks in New York State for the summer, as she had done for the last 60+ years. While various family members were able to be there to support her much of the summer, there was a two-week gap of support coverage that needed to be secured before the summer away could be officially on the books.

Without hesitation, two LWSS team members jumped into action to support the client in a variety

of ways – including time spent at their clients "home away from home" and a road trip back to Cincinnati at the end of the summer. Without the support of LWSS, the client's annual summer tradition would have come to an end. Instead, the client and her LWSS team enjoyed paddleboarding, hiking, and picnics with old and new friends. One team member shared, "It was truly a magical place. We all had a great time."

#### The Little Things Closer to Home

The LWSS team begins each client interaction with one goal in mind: How can I support my client to be as safe, healthy, and engaged as possible in what matters most to them. There is no request or wish too big or what some may consider small. If something matters to their client, it is just as important to them. This could mean anything from stocking up on a client's favorite ice cream flavor or arranging for medication to be delivered directly to the client's home. In 2023, a LWSS team member accompanied a client to a local family wedding. Without this support, the client would have been unable to attend the event. LWSS' support meant the world to him; his smile says it all. Peggy summarized the experience beautifully stating, "I am so grateful LWSS is able to support our clients and their families as they experience both challenges and joys in life."

## Welcomed Progress in ERS Affordable Living By Megan Bradford

2023 was a year of tremendous progress in funding and construction for three ERS Affordable Living communities.

Historically, ERS Affordable Living deals have closed around 12 months after an award is received, due diligence is completed and any additional funding has been secured. However, due to COVID-19, the last few years have proved challenging in many ways. Like other areas of ERS, Affordable Living faced financing delays and significant, unanticipated increases in construction materials and labor costs. Additionally, HUD funds presented unique challenges in receiving various needed approvals. Over the last several months, the Affordable Living team has worked diligently to close the increased funding gaps. The Ohio Housing Financing Agency (OHFA) awarded ERS additional housing credits for Prairie Gardens in Wilmington, Ohio, and Westminster Court II in Blanchester, Ohio. With these funds secured, official closings for Prairie Gardens (originally funded in 2020) and Westminster Court II (originally funded in 2021) took place in the summer of 2023.



Construction is in full swing at both properties



The original structure at Prairie Gardens has been demolished to make room for 32 new, garden-style units across 6 buildings. This project also includes

the rehab of a 10-unit community nearby, Mulberry Place. Additionally, the comprehensive renovation of Westminster Court II's 50-unit 2-story building is underway. Updated apartments will meet modern day accessibility standards, energy efficient appliances, new floors, and updated finishes, as well as enhanced energy efficiency across the community. Construction is ahead of schedule for both projects, with completion anticipated in late summer 2024.

Financing for a third deal made tremendous progress in 2023. ERS was awarded Pedretti Place in 2022 and, like other projects, was met with a significant funding gap due to construction cost increases after the award was received in 2022. With the hard work of the Affordable Living team, several additional funding sources were received to fill the gap and allow the project to move forward.



After much anticipation, Pedretti Place officially closed in March of 2024; construction of the new 48-unit building is now underway in Delhi Township. Pedretti Place will feature 1- and 2-bedroom apartments, as well as a large community room, fitness center, laundry room, outdoor covered patio, and on-site staff offices. Construction is on schedule, with anticipated completion in June 2025.

"The hard work was worth it." Janet Westrich, Affordable Living's project development manager, shared. "The work accomplished in 2023 represented years of efforts to overcome many challenges. With teamwork and perseverance, these projects are moving quickly towards the end goal of providing safe, modern homes in updated communities for 140 older adults."

#### 2023 Episcopal Church Home Donors

The Episcopal Church Home would like to recognize the following contributors for the extraordinary kindness and generosity they have expressed in 2023 through their philanthropic investments of \$1,000 or more.

#### Gifts of \$20,000 and above

Estate of Benjamin F. Few, Jr.

#### Gifts of \$10,000-\$19,999

Community Foundation of Louisville<sup>~</sup> Stock Yards Bank

#### Gifts of \$5,000-\$9,999

William C. Almstedt Foundation Baird Trust William Chandler ~ Mark and Laura French The Rev. John F. Koepke, III\* Joanna and William Panning PCA Pharmacy Gordon and Nancy Ragan ~

#### Gifts of \$1,000-\$4,999

William Alden, III<sup>~</sup> Edith Bingham Rebecca Burns<sup>^</sup> W. Thomas Cooper<sup>\*</sup>

William Davis ECH Woman's Board Jessica Eddleman Beverly Edwards^ Sharon Farson Jean Frazier Robin Garr and Mary W. Johnson Thomas Gebhart Mary Louise Gorman Thomas and Marcia James Patricia King Rob\* and Laura King Laura Lamb^ Michael and Betty Mahoney W. Eugene and Barbara March Wendell Meyer and Ann Stevenson Paul Scheper\* Robert and Tori Spagat Juanita "Weezie" Walker+

#### Morton Society Members:

The John P. Morton Society celebrates founder of ECH, John P. Morton by recognizing individuals who have remembered Episcopal Church Home in their estate plans.

Georgine Buckwalter
Ann Davis
Stephen and Barbara Ellis
James and Kathy Hendon

Keith Knapp Wendell Meyer and Ann Stevenson Robert and Sharon Nesmith Gordon and Nancy Ragan Anne and John Vanderburgh Virginia and James Woodward

(\*) Denotes an ERS Corporate Board, ERS Foundation Board, ECH Foundation Board, Affordable Living Board, or Committee Member in 2023; (^) Denotes a Staff Member in 2023; (+) Denotes an individual who passed away; (~) Donation was made via The Community Foundation; Note: Every effort was made to accurately recognize donors for their generous contributions. Please contact the ECH Fund Development office at 502.813.4895 if you believe an error has been made in the listing of your gift so that we can correct it in future listings.

#### 2023 Community Partnerships

ERS is grateful to the following foundations, corporations, churches and other organizations that made contributions last year.

#### Gifts of \$20,000+:

The Ellen A. and Richard C. Berghamer Foundation Christ Church Cathedral Hamilton County CARES Relief Funds H.B., E.W. & F.R. Luther Charitable Foundation Model Group L. & L. Nippert Charitable Foundation Ohio Capital Corporation for Housing Ohio Capital Impact Corporation Ridge Stone Builders & Developers Jacob G. Schmidlapp Trusts, Fifth Third Bank Trustee

#### Gifts of \$10,000-\$19,999:

The Diocese of Southern Ohio Meals on Wheels America PNC Bank Church of the Redeemer The Springfield Foundation

#### Gifts of \$5,000-\$9,999

William P. Anderson Foundation ATA Beilharz Architects BMO Harris Bank Brunner's Lawn and Services The Butler Foundation Community Health Foundation The Dayton Foundation Ft. Washington Investment Advisors Graydon HealthPath Foundation of Ohio TheKey Millennium Business Systems Premier Mail & Fulfillment Sysco Tidwell Group

#### Gifts of \$2,500-\$4,999

Buerger Energy Calvary Episcopal Church Key Bank Lutheran Benevolent Society Medpace NextStep Networking Paycor Planes Companies Riverhills Bank SFCS St. Thomas Episcopal Church UC Department of Neurology & Rehabilitation US Bank Wohlgemuth Herschede Foundation

#### Gifts of \$1,000-\$2,499

**Aegis Protective Services** The Asset Advisory Group Braun Heating and Air Conditioning Christ Episcopal Church, Dayton DeBra-Kuempel Deffet Group Gallagher HealthPro Heritage Johnson Investment Counsel Ken Never Plumbing Kroger - Community Rewards **Personnel Profiles** Relequint RSM US St. Mark's Episcopal Church St. Paul's Episcopal Church Vogt Strategic Insights Ziegler Senior Living Finance

#### 2023 Living Legacy Society

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

Anonymous (4) Frances N. (Nicky) Bade Gay and St. John+ Bain Leah Bird Joy Rowe Blang<sup>•</sup> Jon B\* and Jeanne M. Boss Eleanor A. Botts Anna K. and George G.+ Carey, IV Mr. and Mrs. A. B. Closson, Jr. Diana L. Collins<sup>•</sup> Christopher and Melissa Cowan Katherine Duval Robert Evans and Brian Miller Mary Beth and Jim+ Foxworthy Tal+ and Alan M. Gast Sue Grethel\* Al Harris Robert and Judith Heaton Theodore+ and Barbara High Stanley A. Hooker, III "Tad" Angela and Noel\* Horne Kathy Ison-Lind® Harry Kangis\* and Julia Hawgood K. Jay • and Lana Kittenbrink Kathy and Mike+ Krug Jeff and Laura<sup>•</sup> Lamb Louise Landen Mr. and Mrs. Keith\* and Sue Lawrence Susan C. Lehman Mr. and Mrs. Robert G. Linkins The Rev. David Lowry Janice W.+ and Gary R. Lubin Mary-Morse ("Mimi") Matthews<

Tom and Nancy McOwen Jane+ and Earl Mills Ken<sup>•</sup> and Pam Paley The Rev. Angelo<sup>•</sup> & Mary Louise Puopolo, Jr. Paul\*•and Mary Lee Scheper Mike T. Schueler The Revs. Bruce and Susan Smith Robin and Geoff Smith Doug<sup>•</sup> and Kathy Spitler Barbara Sporck-Stegmaier Mr. Emerson Stambaugh<sup>•</sup> and Mr. Michael Abernathy David and Linda Stetson Dr.+ & Mrs. Thomas U. Todd Frank<sup>•</sup> and Ginny<sup>•</sup> Uehlin Mr. James Wersching Jack+ and Elizabeth Williams Anne\* and Samuel+ Wilson

#### Planned gifts realized in 2023

The Estate of James T. and Jayne T. Aglamesis The Estate of Marilyn F. Bubel The Estate of Wilson and Nancy Breiel The Estate of Elizabeth Lilly The Estate of Cece and Tom Mooney The Estate of Eli and Ilona Perencevich The Estate of Dr. Elizabeth Goessell Rule

(<) Individual(s) joined in 2023; (+) Former or Current Staff Member; (\*) Denotes an ERS Corporate Board, ERS Foundation Board, ECH Foundation Board, Affordable Living Board, or Committee Member in 2023; (+) Denotes an individual who passed away; Note: Every effort was made to accurately recognize donors for their generous contributions. Please contact the ERS Fund Development office at 513.979.2308 if you believe an error has been made in the listing of your gift so that we can correct it in future listings.

#### 2023 Samaritan Circle

The Samaritan Circle is comprised of individuals who generously support ERS' annual ministry needs through the Good Samaritan Mission Fund, Emergency Relief Fund and specific project requests with a donation of \$1,000 or more.

#### latinum Level: \$10,000+

Mrs. Linda Callard George Fabe Fund of Greater Cincinnati Foundation Alan M. Gast JoAnn\* & Gary Hagopian Charitable Fund Harris Family Charitable Fund Noel\* and Angela Horne Linda Klump\* Elizabeth Lilly+ Anonymous Fund of Greater Cincinnati Foundation Nash McCaulev Leslie and Redmond+ O'Neill Charitable Trust Mills Family Fund Charles and Clare Rodes Gates\* and Kathy Smith Family Fund Albert\* and Liza Smitherman Stetson Family Fund Sally Tieke

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

Anonymous Marjorie Davis\* Charitable Fund of The Greater Cincinnati Foundation Brian and Missy\* Fox Bob and Naomi Gerwin Stanley A. Hooker, III "Tad" Andrew MacAoidh and Linda Busken Jergens Sally R. Kelsall Michael C.+ and Kathleen B. Krug Krug Episcopal Retirement Services Fund of Greater Cincinnati Foundation Jeff and Laura<sup>^</sup> Lamb The Lyon Family Fund Bobby and Rachel Maly Jeff and Jeanette March

Tom and Pam Mischell Paul\* and Mary Lee Scheper The Linda and Miles Schmidt Working Dog Charitable Fund Marilyn Sesler Steve and Liz Sudberry Anne Warrington Wilson\* Chip\* and Abby Workman Charitable Fund

#### Silver Level: \$2,500-\$4,999

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#### Bronze Level: \$1,000-\$2,499

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Gay Bain Gaysie Fund of Greater Cincinnati Foundation Mary Ellen Baude David and Marilyn Beran Berres Charitable Gift Fund Leah Bird Ann and Ben Blemker **Bolek Charitable Giving** Dan and Megan<sup>^</sup> Bradford Wilson Breiel+ Diane Brown Tony\* and Michelle Bruns Marilyn F. Bubel+ James and Eileen Chalfie Christenson Giving Fund Scott and Kelly Clark Family Foundation Michelle^ and Tom Cole Diana L. Collins Dean Colville and Marvin Collins Mary Crosset+ Bill and Polly Culp Pierson Davis Judi Dean^ Barbara M. Elleman Walter and Mary Ann Feige Alonzo Folger\* Don and Beverly Good Nancy R. Gottschalk Charitable Foundation RCL Fund of The Greater Cincinnati Foundation Haas Family Foundation Fund at Schwab Charitable Suzy Hall Anne W. Harrison A.C. Hickox Linda and Richard Holthaus Gregory Hopkins\* Lona and Gregory Hough

Terry and Heather Howe Nancy Ike The New York Community Trust Overbrook Family Advised Fund of Stephen F. Áltschul Martha N. Jones Peter Juszczyk^ Harry J. Kangis\* and Julia Hawgood Barbara Kauper Eric H.\* and Jan-Michele Lemon Kearney Janet Kindel Corky Ladd John and Susie Lame Foundation with Greater Kansas City Community Foundation Chuck\* and Peggy\* Landes Louise LaNouette Mary Patrick Latham Charitable Account Keith\* and Sue Lawrence Susan Lehman The Rev. David B. Lowry Jenni Miller-Francis^ Roy A. Mitchell\* Jack D+. and Marilyn+ Osborn Marilyn J. and Jack D. Osborn Fund of Greater Cincinnati Foundation Thomas H. Ottenjohn Richard B. Paulsen Donor Advised Fund Iennifer Pavne\* and Todd Stevens John Poffenberger Apryl Pope\* Nancy Powell Esther Power+ The Rev. and Mrs. Angelo J.^ Puopolo, Jr. Stephen and Catherine Rabe The Reed Family Foundation

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