



Fall 2015

Linkage

Putting Residents First

Marjorie P. Lee Master Plan
Gets An Update

PLUS: MEET THE TELEHEALTH ROBOT

ERH

Episcopal Retirement Homes



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ON THE COVER:

Episcopal Retirement Homes President and CEO Doug Spitler (pictured) and the Excel Team share key information about the Marjorie P. Lee master plan update on page 6. Photograph by Gary Kessler

ERH Communities & Services

Premier Retirement Communities
Deupree House | Marjorie P. Lee

Affordable Living Communities
25 locations in Cincinnati and the Tri-State. For a complete list and more information on these communities visit AffordableLivingbyERH.com.

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*Deupree Meals On Wheels
Living Well Senior Solutions
Parish Health Ministry*



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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.

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Linkage is a resource to address issues and interests of older adults, providing a link between ERH's programs and the community. Since 1951, Episcopal Retirement Homes (ERH) has dedicated itself to improving the lives of older adults from all faiths through innovative, quality living environments and in-home and community-based services delivered by experienced and compassionate professionals.



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Linkage is published by *Cincinnati Magazine* on behalf of Episcopal Retirement Homes.

ERH Next Generation Leaders Promoted

Photograph by Gary Kessler



*From left:
Laura Lamb,
Megan Kron,
Emerson
Stambaugh
and Ginny
Uehlin.*

If you ask Robin Smith, the Board Chair of Episcopal Retirement Homes (ERH), what's on her mind these days, the answer is very clear: "The transition of ERH's leadership management is the top priority for the Board for 2015, with the primary responsibility of selecting and hiring a new CEO to replace Doug Spitler, who will retire in 2017." She continues, "The Board will be conducting a national search for Doug's replacement and will be vetting our internal candidate, Laura Lamb."

The next steps in this process are to put a leadership framework in place for the future.

As ERH prepares for the transition, we are excited to announce the following promotions:

- Laura Lamb is appointed Executive Vice President of ERH. In her new role, Laura will provide leadership and oversight in the areas of strategy, finance, technology, business development, and

residential housing and healthcare operations.

- Ginny Uehlin is appointed Vice President of Residential Housing and Healthcare and will become a member of the ERH Excel Team.
- Emerson Stambaugh is appointed Executive Director of the newly created Hospitality Services Team. Emerson will be responsible for the non-healthcare services ERH provides to residents, such as dining services, housekeeping, maintenance, transportation, life enrichment at Deupree House and move-in coordination at Marjorie P. Lee.
- Megan Kron is appointed Administrator for Deupree House and Deupree Cottages and will also be responsible for the overall operations of Deupree Cottages.

Please join us in congratulating Laura, Ginny, Emerson and Megan and wish them well in their new assignments!

—Kristin Davenport

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.

ERH was delighted to hear that Board Chair Robin Smith has committed to another three-year term. “I want to provide continuity of leadership during this critical period of senior-management transition,” she says.

In this issue of Linkage, we visit with Smith and meet two new dynamic and passionate volunteer Board members who help drive ERH.

By Whitney Harrod Morris | Photographs by Gary Kessler



Robin Smith

ERH Board Chair

How long have you been on the ERH Board? Eight years.

Why have you chosen to continue serving on the Board?

I'm fully committed to the mission of ERH and to the ERH organization.

What makes your board service rewarding for you? I enjoy the talented and dedicated people I get to work with on the Board and at ERH. They are passionate about serving elders in our communities, and they will do whatever is asked of them to advance the mission of ERH.

What do you envision as the future of ERH? ERH will continue to grow and expand to serve more elders in more communities. ERH will continue to lead and innovate in services—memory support, enriched living, healthcare delivery and wellness—to enhance the wellbeing of our elders.

What will be ERH's biggest challenge over the next 10 years? Assessing and pursuing the many opportunities for future growth through partnerships, joint ventures, affiliations and transformation of our existing communities, while maintaining a strong focus on ERH's core services and ministries.



The Rev. John “Jack” F. Koepke III

ERH Board Member

Board committees he serves on: CEO Search Committee and the Leadership Committee

Occupation: Canon to the Ordinary of the Diocese of Southern Ohio.

Areas of expertise: I bring experience of being a leader, pastor and theologian to the Board. I also have experience in organizational development and management.

Something people might not know about you: I’ve served on the boards of the Miami Valley Hospital in Dayton, Dayton Public Radio and Habitat for Humanity. I understand some of the challenges and opportunities that nonprofits face.

How many years have you been with ERH? At least 10 years. This spring I was appointed to the Board by The Rt. Rev. Thomas Breidenthal.

Most rewarding part: Getting to know and work with the other members of the Board and members of the committees on which I serve.

What do you do in your free time? I golf, sail and cook—but not all at the same time!



Anne Wilson

Alternate Board Representative from Deupree House

ERH committee she serves on: Executive Committee of the Residents’ Council

Former occupations: Office manager, teacher and tax preparer at H&R Block

Area of expertise: Finance, specifically tax returns

Something people might not know about you: I was a 50-year member of the Junior League of Cincinnati. I’ve also served as a first-person interpreter at the Cincinnati History Museum.

How long have you been with ERH? I’ve lived at the Deupree House for eight years, and I joined the Board in January 2014.

Why do you volunteer on the Board? To help preserve ERH for future residents.

Most rewarding part: Seeing how involved the Board is in advancing the welfare of the organization. The Board has done a great job of improving facilities and increasing opportunities for residents.

What do you do in your free time? I lead a Saturday morning aqua aerobics class held at the Deupree House indoor pool.



MPL residents like Dan Wheeler can visit their doctor without leaving home.

High-Tech House Call

By Val Prevish | Photos by Gary Kessler

Residents at Marjorie P. Lee and Deupree Cottages may notice a new “face” in the halls—a robotic face, that is. Episcopal Retirement Homes (ERH) is piloting a VGo robot that enables physicians and family members to interact with patients remotely to enhance care and improve communication.

At about 4 feet tall with wheels and a 4-inch-square screen where the remote operator’s face appears, the VGo is a sleek new piece of technology, says Executive Vice President Laura Lamb. Using a secure Internet connection, the remote operator is able to direct the VGo independently of those near to the robot. The user and those who interact with the VGo user, get the feeling the operator is right there to see, hear and talk to the people in the room as if he or she was physically present.

“I could be anywhere in the world, and I could dial in to the VGo and then I can be in that spot through the robot,” Lamb says.

This new technology has the potential to revolutionize the way residents receive care from physicians, and even the way they are able to interact with distant loved ones, says Lamb.

ERH is piloting the device in conjunction with The Christ Hospital Heart & Vascular physicians and with University of Cincinnati Medical Center. Already the robot has exceeded expectations.

“This enables us to improve communication between doctors and residents,” Lamb says. “The VGo makes it simpler for a specialist to examine a resident remotely, saving time and improving outcomes.”

In addition to visual and audio communication, the VGo uses USB ports to enable remote monitoring of vital signs such as heart rate, pulse, body temperature and breathing. The robot’s camera allows for zooming in to get a better view of a specific area, wound or injury.

Judi Dean, Director of Nursing at Marjorie P. Lee, says the VGo is a big step forward in the care of residents who are healing from surgery or recent illness.

“Before the VGo, our nurses spent a lot of time back and forth with physicians on the phone painting a picture of what the resident’s condition was like,” Dean says. “The physician usually wanted to see the resident, and that meant a trip to the hospital, often unnecessarily. Using VGo, the physician can see the resident and make the proper diagnosis. It’s valuable, and it can prevent re-hospitalizations.”

Lamb says she also sees opportunities for residents to communicate in a more personal way with distant relatives and friends. “Family members who are far away can use the VGo to see their loved one and be involved in care planning,” says Lamb. “This isn’t just for doctors.”

Eventually, Lamb says she’d like to have more than one VGo. “Once you see this robot in action, the light bulb comes on,” she says. “You see the value. I’d love to add more of them to our residences.” ■



Director of Nursing at Deupree, Lisa Zimmers, teams up with VGo to bring a doctor and resident together.

Marjorie P. Lee Master Plan Putting Residents First

Residential Living Will Be a Key Element

By Arielle Goldberg | Photo by Gary Kessler



Episcopal Retirement Homes (ERH) is responding to needs expressed by current and prospective residents—needs that are apparent right now in the community. “As people live longer, many folks are coming to us later in life, when there is an acute need for more services, particularly on the healthcare side,” says Doug Spitler, President and CEO of ERH. “We want to make sure we can meet their increasing healthcare needs, while ensuring they still maintain their independence and lifestyle choices as much as possible.”

This is the reason master planning is so important. Each decade since the 1960s, ERH has revised the master plan for the Marjorie P. Lee (MPL) community to keep in step with the changing needs of older adults. This year, ERH announced the sixth and latest version of its dynamic, multifaceted MPL master plan.

“We’re going to be able to accommodate people at all steps along the path [of senior living] without their having to pick up and move,” adds the Rev. David Lowry, ERH Board member and MPL resident. Once again, ERH is leading the way. By anticipating increased demand and a shift to more personalized service delivery, the MPL master plan will expand available services and improve residential home design to enhance the living experience of current residents and to attract new ones.

Research Underscores New Concepts

“We believe that as a leader in senior healthcare in Cincinnati, we really need to respond to community

“We’re going to be able to accommodate people at all steps along the path [of senior living] without their having to pick up and move.” —Rev. David Lowry

“The last retirement community I lived in doesn’t hold a candle to Marjorie P. Lee.”

—Joe Front



needs,” says Laura Lamb, Executive Vice President of ERH.

These needs were underscored in a detailed analysis of short- and long-term trends, which, according to Michael Starke, research consultant for the master plan and managing director of PMD Advisory Services, revealed that senior living and care services provided by MPL will be in high demand through 2035. Additionally, the MPL Excel Team gained further insights through Starke’s research and competitive analysis, three rounds of market studies and additional resident feedback that the categories of independent and assisted living are evolving. “The lines have been blurred between independent and assisted living,” Lamb explains.

Building on that research and analysis, the master plan shifts ERH’s focus to the concept of “residential living,” says Lamb, which encompasses a continuum of care for needs and lifestyles without labels and is in line with ERH’s philosophy of Person-Centered Care. “Considering all residents as unique individuals,” says Lamb, allows ERH leadership “to open up a whole new way of thinking about providing high quality services to those who need it.”

Physical Changes to MPL

The master plan focuses on services provided to residents with less emphasis on physical changes to the building, says Lamb. In order to make those in-

dividualized services possible, however, more private rooms and long-term care options will be created, and the campus will undergo major redesigns and upgrades when construction starts in September 2016.

“The ability to upgrade the community to what would be state-of-the-art today is excellent,” notes Jack Brunner, an MPL resident. “I think it’s a forward-looking program.” Brunner recently completed a successful six-week stay in MPL’s short-term rehab center, which is just steps away from his apartment.

Starke noted that the residential-living concept shifts the focus from brick-and-mortar locations to defining and delivering the individual care residents receive. Some physical modifications to MPL are also planned this year, he adds, and will “enable ERH to enhance its Person-Centered Care philosophy.”

Expanding Services

The MPL master plan will expand and enhance services, offering a wider range of support and allowing ERH to serve residents across a wide range of different needs. Specifically, Lamb says, the master plan will dramatically increase memory-support accommodations for residents to four times the current number to meet increased demand. Lowry notes that this expansion is a huge benefit of the plan, with the entire fifth floor being devoted to memory support.

ERH will also create Centers of Excellence for

selected therapies, as well as expand short-term complex-care rehab services at MPL.

Enhancing Existing Relationships and Building New Ones

The most exciting change, says Betsy Babb, an RN and geriatric care manager with the ERH Living Well Senior Solutions team, is that residents will be able to stay where they live and receive care that works for them, rather than having to move to different parts of the building to receive customized assisted-living services.

For Babb's father, Joe Front, a current resident at MPL, the master plan will enhance his already positive experience. "He is so much more active now because he has everything right here," Babb says. His social network, she adds, is key for her father to remain independent and intellectually engaged. The benefits extend to her relationship with him, too.

"It allows me to be a daughter to him rather than a caregiver—our conversation can be about a music performance or play he saw, rather than, 'Did you take your medicine?' Or, 'How did the doctor's visit go?' It gives me my relationship as a daughter back. It's awesome."

By bringing services to residents in their existing accommodations, rather than automatically asking them to move to other areas of MPL as their needs change, the master plan enhances the already dynamic sense of community residents enjoy by affording more stability and better personalization in their care. If and when long-term skilled nursing care or memory support is called for, MPL will have expanded capabilities and services there as well.

Babb, Lowry and Brunner concur that the biggest improvement the master plan will provide is freeing residents to stay in their own homes to receive personalized care, allowing them to socialize, build relationships and enjoy the resources and classes MPL offers that much more.

Questions on the Master Plan?

Phased construction for the \$20 million project will start in September, 2016. Questions are welcomed and should be directed to Ginny Uehlin, Vice President of Residential Housing and Healthcare, at (513) 979-2333.



"The ability to upgrade the community to what would be state-of-the-art today is excellent." —Jack Brunner with his wife, Jean



"It allows me to be a daughter to him rather than a caregiver."

—Betsy Babb with her dad, Joe Front

The 2015 Martindell Award

Congratulations to Patrice Pryor! *By Kristin Davenport*

Photo by Kristin Davenport



The family of a Deupree Cottages resident nominated Pryor and described her as a person who “always responds with gentleness, patience and respect.” Former ERH Board Chair Trish Martindell, right, presented the award to Pryor, pictured holding her certificate.

Please join Episcopal Retirement Homes (ERH) in congratulating Patrice Pryor, a versatile worker at ERH’s Deupree Cottages, who received the Martindell Award on September 22. An employee who goes above and beyond the call of duty in caring for residents receives this distinguished award and is recognized for outstanding service within the ERH community.

The family of a Deupree Cottages resident nominated Pryor and described her as “hard working, strives to treat the residents like family, has always responded with gentleness, patience and respect.” The nomination continues, “Patrice improves our mother’s daily life with her kind and caring interactions. We are grateful for her dedication to the residents at the Cottages.”

Former ERH Board Chair Trish Martindell founded the award as a legacy in memory of her father, John Wahlberg, who resided at the former Deupree Health Center. She was inspired to endow the award

by her father’s caregivers and their devotion to service. These compassionate and skilled ERH team members made a lasting impression on Martindell by the way they enabled her father to live out his last years with dignity, purpose, choice and freedom.

Pryor was recognized personally by her managers and coworkers and received a \$1,000 check, presented by Martindell and her husband, Jack.

In this third year for the award, ERH residents and families made more than 140 nominations of non-management team members who exemplify Person-Centered Care. It was very difficult to pick one winner from so many deserving nominees.

“Patrice is dearly loved by all of the residents at Deupree Cottages, and we are so proud of her!” adds Joan Wetzel, Director of Human Resources & Organizational Development.

Nominations for the 2016 Martindell Award will be accepted beginning in June. Information can be found online at episcopalretirement.com/awards.

Going Above and Beyond for Affordable Living Communities

70 Edgers rappelled at the two-day Over The Edge For Elders event.



Over The Edge For Elders photos by Rommy Salerno



Crowd-favorite VIP rappellers included 94-year-old Astar Daniels of St. Paul Village and U.S. Bank's Carl Adkins, dressed as Spiderman.



Vice Mayor David Mann and former Vice Mayor Jim Tarbell rappelled 10 stories down the Central Parkway YMCA at Celebrate! Over The Edge For Elders.



VIP rappellers included three Episcopal priests—the Rev. Darren Elin, the Rev. Canon Jack Koepke and the Rev. Jason Leo—who all went Over The Edge For Elders.



The Rev. Charlie Brumbaugh from Episcopal Church of the Redeemer rappelled on Saturday to raise money for limited-income seniors.

On Friday, June 12, more than 350 guests packed a tent near the Central Parkway YMCA for the *Celebrate!* event to kick off the Over The Edge For Elders fundraiser and watched as 11 Edgers rappelled 10 stories. Those intrepid individuals included Cincinnati's Vice Mayor David Mann, former Vice Mayor Jim Tarbell, the Rev. Canon John Koepke from the Episcopal Diocese of Southern Ohio and U.S. Bank Vice President Carl Adkins, who dressed as Spiderman! The most anticipated rappel of the evening was by 94-year-old St. Paul Village resident Astar Daniels.

The following day, 59 more Edgers rappelled to raise funds for affordable senior housing where deserving older adults can live with dignity in a secure and enriching community.

Combined, the two-day event raised more than \$85,000 in support of the life-enriching programs and services offered within Affordable Living by ERH communities.

Former ERH Board member Trish Martindell served as the honorary chairperson, and ERH Board member Susie Lame led as chairperson. The presenting sponsor was U.S. Bank, and lead sponsor was the Model Group. The building sponsor was the Central Parkway YMCA, soon to house Parkway Place—an ERH community offering 65 apartments for older adults with limited incomes. Thanks to everyone who made this event such a huge success!

—Kristin Davenport



Photo by Gary Kessler

Trish Martindell

Photo by Gary Kessler



Welcome Joy Blang

One of the newest members of the Episcopal Retirement Homes (ERH) team brings a wealth of knowledge and experience to a new role. ERH welcomes Joy Blang as Executive Director of Philanthropy.

Blang's most recent responsibilities in nonprofit development and leadership include six years with Josh Cares, an organization dedicated to providing seriously ill children with comfort, support and companionship at Cincinnati Children's Hospital Medical Center. As executive director of Josh Cares, she doubled both funding and services provided.

In addition to her career experience, Blang holds a bachelor's degree in education from DePauw University and a master's in public affairs, with a concentration in not-for-profit management, from Indiana University.

While Blang's early career choices focused on children and families, the challenges of older adults became more important to her personally as she looked at her parents' changing needs. "Life dramatically changed for me recently as my parents have reached a new stage in life, and the ERH mission is that much closer to my heart now," she explains.

Blang's overarching goal in this role, she says, is to secure the future of ERH residents. Blang heads up a fund development team that is responsible for fundraising for the entire ERH organization, including the Good Samaritan Mission, Affordable Living Communities, and Major and Planned Giving. She and her team are focused on both the long- and short-term needs of ERH residents, including meeting annual ministry needs and raising the philanthropic support necessary to fulfill the vision of the latest Marjorie P. Lee master plan.

"ERH is at a time of great growth," Blang says. "Affordable living is growing very rapidly—and what makes it so special is that we are not only providing a nice environment for limited-income older adults to live in, but we're also providing a great deal of additional life-enriching activities and health and wellness opportunities to help them live happy lives and remain as independent as they can for as long as possible."

Blang is also passionate about her team and getting to know the residents. "One of my top priorities now," she says, "is becoming engaged in the communities where residents live and forming relationships and friendships of my own with them."

"Joy brings a deep commitment to and considerable experience in nonprofit ministries to ERH," says the Rev. Bruce Smith, ERH Board member and Vice-Chair of Development. "And she is definitely a people person, which is essential for anyone working in the field of philanthropy."

For her part, Blang says, "I'm fortunate to be part of an organization that's so forward-thinking and so committed not only to its physical communities but also everything that goes into helping someone live a fulfilled life." —*Arielle Goldberg*

Donor Spotlight

The Rev. Susan Lehman



Photo by Gary Kessler

When the Rev. Susan Lehman retired as chaplain of Sweet Briar College in Virginia, she and her husband John Dalzell were planning to “spend eternity” in the mountains of Virginia.

After living in their retirement home for a while, it became apparent that the mountains would in fact be a challenging place to retire. So in 2006, the two moved to Cincinnati, where they had lived during the 1970s and where Dalzell was born and raised.

The couple took up residence downtown on Fourth Street, near Christ Church Cathedral, where Lehman served in pastoral care ministry. Lehman’s work included visits to church members at many retirement communities around the city, which gave her insight into a variety of senior living lifestyles. “Regarding Marjorie P. Lee,” says Lehman, “with everything we would need under one roof and at the center of a vibrant neighborhood, there’s no question it will

be the place for us, when the time is right.”

The couple continues to be very active in the broader community: Dalzell is a talented artist, and Lehman continues her ministry in the Episcopal Church.

Their varied interests give them many options to consider for making a charitable gift. Lehman felt it was important and exciting to make a bequest to MPL. “To give for a future that I cannot know—it’s daring and I love that. It’s a moment of grace.” She adds: “We took time to think about the things that really matter in our lives. I have a chance to make a statement, and supporting Marjorie P. Lee’s mission is the statement I want to make.”

ERH is grateful to the Rev. Susan Lehman for her trust and her commitment to our mission. We are thankful for her gift to the Marjorie P. Lee community. ■ —Kristin Davenport

For more information on charitable gifts, contact Diana Collins at (513) 979-2307, dcollins@erhinc.com, or visit online at EpiscopalRetirement.com. All gifts are tax-deductible to the extent provided by law.

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Meet your personal financial goals and maximize your philanthropic giving through sound and timely gift planning with ERH.

Gift planning combines your financial, tax and estate objectives with an appreciation of the current needs and long-term goals of ERH.

The result? A contribution that can:

- Save you taxes
- Preserve your estate
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A Quick Reference to Get You Started in the Gift-Planning Process

YOUR GOAL	HOW & WHY
Support ERH's future without affecting your current cash flow or portfolio.	Make a bequest in your will or living trust and retain control of your assets during your life-time while receiving an estate-tax deduction.
Avoid double taxation on IRAs or other retirement plans.	Name ERH as a full, partial or secondary beneficiary of your retirement plan and leave other assets to your family. This will eliminate income tax on retirement-plan assets and free up other property to pass to your heirs.
Receive stable income, reduce the capital-gains costs, secure stable lifetime payments.	Set up a charitable gift annuity and receive an income tax deduction with fixed payments for life, part of which are tax-free. The guaranteed interest rates are up to 9 percent based on your age.
Provide current support to ERH and reduce the cost of transferring assets to your family.	Set up a charitable-lead trust and pass assets on to your family with minimized estate and gift taxes because you freeze the taxable value of growing assets before they pass to your family.

For more information, contact Diana Collins at (513) 979-2307, dcollins@erhinc.com or visit online at EpiscopalRetirement.com. All gifts are tax-deductible to the extent provided by law.

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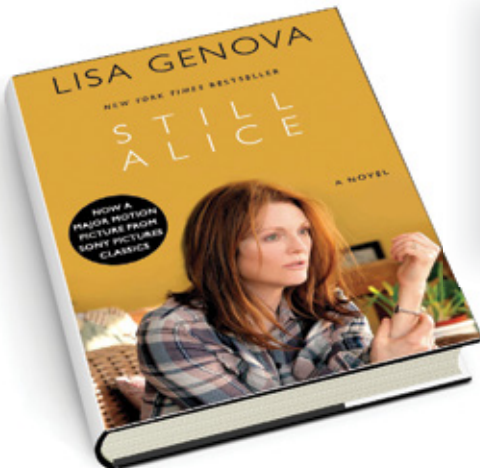
Alzheimer's & Dementia: Caring & Communication that Works

Featuring **Lisa Genova**,
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who will challenge our thinking
about living with Alzheimer's.

Save the Date: Friday, March 4, 2016

Location: Tri County Assembly in northern Cincinnati

9 a.m. – 4:15 p.m.



Keynote **Lisa Genova, PhD**

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Also featuring **Teepa Snow, MS, OTR/L, FAOTA**
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