



2020 Annual Report

Friends,

Since 1975, Pro Seniors has advocated for the rights and dignity of Ohio seniors – providing no-cost services to help seniors maintain their independence, financial stability and peace of mind.

Last year, thanks to your support, we helped more than 8,000 seniors resolve legal and long-term care problems that had the potential to derail their lives.

We are pleased to share our 2020 Annual Report highlighting our work to improve the lives of Ohio seniors and the people who made it possible: you — our supporters, our volunteers, and staff.

Throughout the COVID-19 pandemic, seniors faced increasing challenges and have reached out for our help. Yet, due to the state of the economy, our funding sources are strained. We need your continued support to ensure that we can be there for seniors when they need us most.

With appreciation for your support,



Michael M. Kennedy
Board President



Dimity V. Orlet, J.D.
Executive Director

Who We Are

Founded in 1975, Pro Seniors is a non-profit organization dedicated to helping seniors maximize their independence and quality of life. Pro Seniors' experienced staff understands the complex issues seniors face. Our expertise allows us to take a comprehensive approach to promoting seniors' legal rights, access to health care, and financial security.

What We Do

Pro Seniors helps older Ohioans prevent and resolve legal and long-term care problems. We offer a range of legal assistance to help seniors understand and protect their legal rights and resolve their legal issues, including information, advice and representation. In southwestern Ohio, our long-term care ombudsmen help seniors and their families with long-term care problems. Throughout Ohio, our Senior Medicare Patrol helps teach seniors how to prevent, detect and report health care fraud, scams, and identity theft.

About Our No-Cost Services



INFORMATION & ADVICE

Our Legal Helpline, a statewide service, provides all Ohio residents age 60 and over no-cost access to the legal information and advice needed to resolve problems that threaten their well-being and economic security. In 2020, Pro Seniors' Legal Helpline aided over 6,000 clients in resolving their legal problems.

LEGAL HELP



REPRESENTATION BEYOND INFORMATION & ADVICE

Pro Seniors' staff attorneys provide no-cost legal representation to seniors in Butler, Clermont, Clinton, Hamilton and Warren counties on issues that are not often handled by private attorneys, including Medicare, Medicaid, Social Security, other public benefits, financial exploitation, and housing. This representation ranges from negotiation to litigation. Our Mid-America Pension Rights Project helps Ohioans of any age obtain all the retirement benefits to which they are entitled.



LAWYER REFERRAL

If a senior's problems cannot be resolved by the Legal Helpline or our staff attorneys, Pro Seniors attempts to match the senior with an affordable private attorney who will handle the matter. Approximately 70 attorneys participate in our Helpline Referral Attorney Panel and accept these matters. In 2020, more than 1,000 matters were referred to our referral panelists.

Helping Those Who Need Us Most

We strive to serve all seniors in need, but make special effort to reach those who are low-income, minority, disabled, or living in rural communities.

Our Legal Clients

6,140

clients helped

7,196

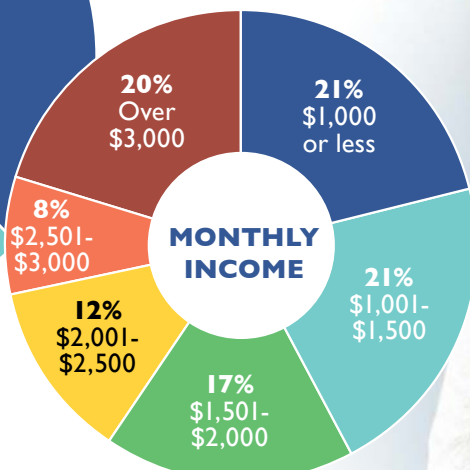
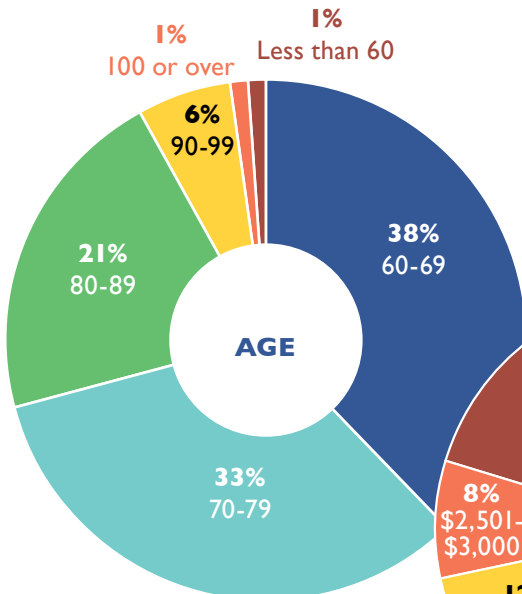
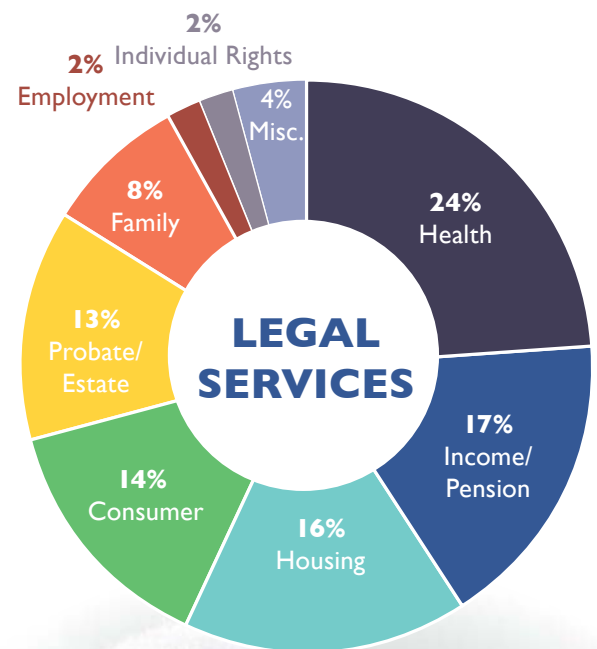
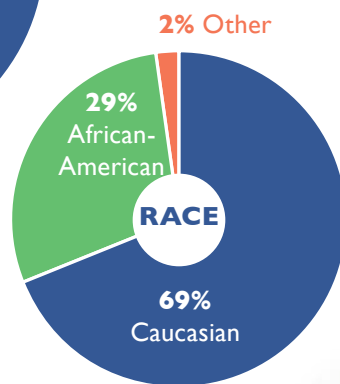
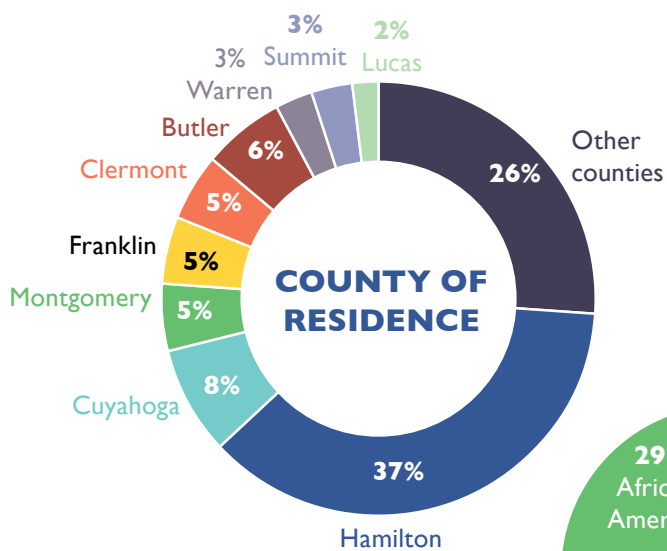
legal matters
handled

5,013

clients with
a disability

775

veteran clients



New Hamilton County Benefits Project Connects Seniors with Food and Healthcare

Thanks to a Community Development Block Grant from Hamilton County, Pro Seniors provided expanded legal assistance to improve the financial security and quality of life of low-income Hamilton County seniors. Our experience and research demonstrated that several government benefit programs with the potential for life-changing impacts were vastly underutilized by eligible seniors. These benefits include Community Medicaid, which pays for healthcare coverage; the Medicare Premium Assistance Program, which helps pay out-of-pocket medical costs for Medicare recipients; Medicare Extra Help, which helps pay Part D premiums, deductibles and co-pays; and the Supplemental Nutrition Assistance Program, which helps cover the cost of food. While each of these programs provides a modest monthly benefit, by enabling seniors to shift their resources towards other immediate needs, the impact of the benefits is dramatic.

Many low-income seniors are unaware of their eligibility for these benefits or have the misperception that they will not qualify. Others find it overwhelming to navigate the enrollment process. Still others are denied coverage due to circumstances that could be remedied by an experienced attorney.

Hamilton County Benefits Project Results

Provided legal helpline assistance &
benefits screening to more than

1,000 seniors

57%

of clients were
female heads
of household

34%

of clients were
minorities

Provided extended legal representation to

42 clients
in 55 matters

Obtained over
\$700,000

in annual benefits for low-income senior clients



Staff attorney Jeremy Koenemann meets
with Hamilton County Benefits Project
client Suzanne Whalen

Suzanne, who has been blind since birth, spent her early years on a farm in upstate New York where she and her sister both helped herd the sheep. Valedictorian of her graduating class from the New York State School for the Blind, Suzanne went on to study in the US and Spain, earned her Master's degree in bilingual education, and taught bilingual students in Texas for over 30 years before retiring in Cincinnati. Despite her years of work, money was tight. Suzanne initially reached out to Pro Seniors for advice about getting repairs made on the mobile home she rented. In addition to getting help on that issue, Pro Seniors' attorneys determined that she was likely eligible for SNAP and the Medicare Premium Assistance Program. The attorneys pursued applications for these programs, successfully securing \$216 in monthly SNAP benefits and \$148.50 in monthly Medicare Premium Assistance for Suzanne. In addition to greater financial stability, Suzanne now has peace of mind knowing that she can afford food and medical care.

Long-Term Care Ombudsmen Help

Our long-term care ombudsmen advocate for excellence in long-term care services and supports in Butler, Clermont, Clinton, Hamilton and Warren counties.

Selecting Long-Term Care

Pro Seniors' ombudsmen help people who are considering long-term care options. Trained staff help people identify their long-term care needs, and available local services and providers to meet those needs.

Ombudsman Assistance

- 8,754 long-term care residents helped
- 1,520 hours of assistance & advocacy to long-term care residents
- 1,115 complaints investigated
- 6,056 hours of complaint investigation



Ombudsman Jimmy Gillespie meets outside with a long-term care client to help her address concerns.

Complaint Investigation & Resolution

Pro Seniors investigates and resolves concerns regarding nursing homes, assisted living facilities, home care and other types of long-term care. We also have a specially trained ombudsmen to help with MyCare Ohio issues for those enrolled in the state's managed Medicare and Medicaid plans.

Top Five

Long-Term Care Consumer Complaints that Ombudsmen Help Resolve

1. Improper Discharge
2. Problems with Care Planning
3. Dignity and Respect Violations
4. Loss or Theft of Personal Property
5. Financial Exploitation



Ombudsman Marvin Wilson follows-up with a client by phone.

Despite the challenges posed by the pandemic, our ombudsman team was steadfast in their advocacy for long-term care residents, communicating with them through outdoor, phone and virtual visits. And, when necessary for a client's well-being, ombudsmen advocated for in-person visits by essential caregivers.

Ohio Senior Medicare Patrol Help

Using a team of volunteer peer educators, Senior Medicare Patrol teaches seniors how to identify, prevent, and report health care fraud, scams, and identity theft. Group education and outreach are presented virtually and at various locations throughout Ohio, including senior community centers, retiree groups, senior buildings and partner host organizations.



More than

200

educational presentations

made to seniors, helping empower them to prevent, detect and report fraud, identity theft and other scams.

More than

9,000

seniors, their families and caregivers reached through community education programs.



More than

27,000

pieces of educational literature providing timely, up-to-date information about preventing Medicare fraud and scams distributed.

Pro Seniors' Ohio Senior Medicare Patrol collaborated with the Council on Aging, the Freestore Foodbank, and Crossroad Health Center to help distribute food and educational material about fraud prevention to seniors in need.



Seniors Who Rock

Seniors Who Rock is our one-of-a-kind annual event celebrating positive images of aging and inspiring Ohio seniors who continue to be a vibrant part of the community. Our remarkable 2020 honorees were Jean Dowell, James Johnson and Barbara Kellar.



Pro Seniors' Executive Director Dimity Orlet with honoree Barbara Kellar



Honoree Jean McDowell



Orlet with honoree Jim Johnson

Past Honorees

2015

The Honorable Nathaniel Jones
Sr. Rose Ann Fleming, Esq.
Mary Meinhardt
Marty Brennaman

2016

Sr. Kathryn Ann Connelly
Jim Scott
Lilly Narusevich
Dee Shaffer
The Honorable Walter H. Rice

2017

Alvin H. Crawford, M.D.
Kathleen M. Brinkman, Esq.
Marilyn Harris
Ronald J. Pfliegerhaer

2018

Dan Hurley
Marianna Brown Bettman, Esq.
Don Neyer
Walter T. Oka

2019

Tom Cuni, Esq.
William Deimling
Maralyn Itzkowitz, M.D.
Dolores J. Lindsay

2020

Jean Dowell
James Johnson, Esq.
Barbara Kellar

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In honor Bob and Barb Winslow
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Anonymous

In memory of Jane Erin Vines
David & Beth Zainey

Pro Seniors appreciates the generosity of donors who contributed between October 1, 2019 and September 30, 2020. Every effort has been made to list donors and respect anonymous contributions as requested. Please forgive unintended errors and notify us of changes by calling (513) 458-5525.

Statement of Financial Position

2020 OPERATING REVENUE

Ohio Access to Justice Foundation	305,996
Council on Aging of Southwestern Ohio	442,245
Victim of Crimes Assistance	401,493
Ohio Senior Medicare Patrol	291,326
Ohio Department of Aging	161,092
City of Cincinnati	30,000
Other federal funding	221,053
Contributions	142,722
Contributed services	59,268
Investment return, net	56,381
Miscellaneous revenues	56,869
Net assets released from restrictions:	
United Way	84,800
Other	79,821
Total operating revenue	2,333,066

2020 FUNCTIONAL EXPENSE

Legal Program	842,232
Ombudsman Program	574,149
Ohio Senior Medicare Patrol Program	333,663
Management and general	532,591
Fundraising	88,439
Total expenses	2,371,074

ASSETS

	2020	2019
Cash and cash equivalents	577,386	256,939
Grants and other receivables	101,987	223,252
Investments	1,070,943	1,015,504
Prepaid expenses	500	-
Property and equipment, net	81,762	31,827
Total assets	1,832,578	1,527,522

LIABILITIES AND NET ASSETS

Liabilities

Accounts payable	10,987	34,091
Accrued expenses	195,530	153,950
Refundable advances	20,823	5,035
Paycheck Protection Program loan	308,800	-
Total liabilities	536,140	193,076

Net Assets

Without donor restrictions	1,262,530	1,311,212
With donor restrictions	33,908	23,234
Total net assets	1,296,438	1,334,446
Total liabilities and net assets	1,832,578	1,527,522

Program Funders

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Helpline Referral Attorney Panelists

Thank you to our referral panelists for helping us bridge the justice gap by providing pro bono and reduced-fee legal services to low-income seniors. Of the 1,116 referrals made in 2020, more than half were completed on a pro bono or reduced-fee basis.

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From left to right, legal interns Glenda Wright and Rachel Harp with staff attorney Matt Barnes.

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