

2023 **ANNUAL REPORT**



Friends,

Since 1975, Pro Seniors has advocated for the dignity and rights of older Ohio adults – providing no-cost services to help seniors maintain their independence, quality of life and financial stability. Last year, thanks to your support, we helped more than 18,000 seniors resolve legal and long-term care problems that had the potential to affect their well-being. And we empowered more than 34,000 seniors through outreach and education.

We are pleased to share our 2023 report highlighting the impact of our work.

Thank you for your support,



Chad S. Levin, J.D.,
Board President



Dimity V. Orlet, J.D.
Executive Director

Who We Are

Pro Seniors is a non-profit organization dedicated to helping older adults 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 and fight Medicare fraud. We offer a range of legal assistance to help older adults 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 older adults and their families with long-term care problems. Throughout Ohio, our Senior Medicare Patrol teaches seniors how to prevent, detect and report health care fraud, scams, and identity theft.

Legal Assistance

INFORMATION & ADVICE

Our statewide Legal Helpline provides Ohio residents aged 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 2023, Pro Seniors' Legal Helpline provided more than 12,000 appointments, which resulted in the Helpline aiding over 7,700 clients in over 8,500 legal matters.

REPRESENTATION BEYOND INFORMATION & ADVICE

Our staff attorneys provide no-cost legal representation to older adults 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. Over 50 attorneys participate in our Referral Panel and accept these cases. In 2023, we referred more than 1,200 cases to panelists. Nearly half of these referrals were made on a reduced fee or pro bono basis.

12,878 Legal Helpline Appointments

937
veteran clients
assisted

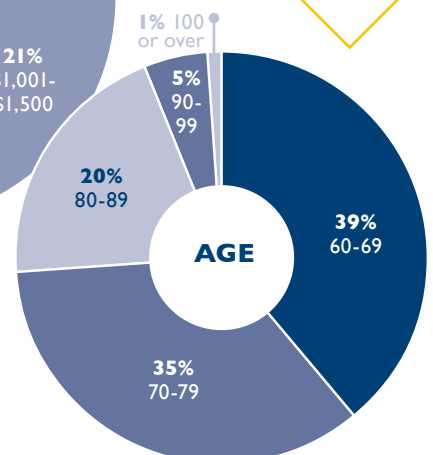
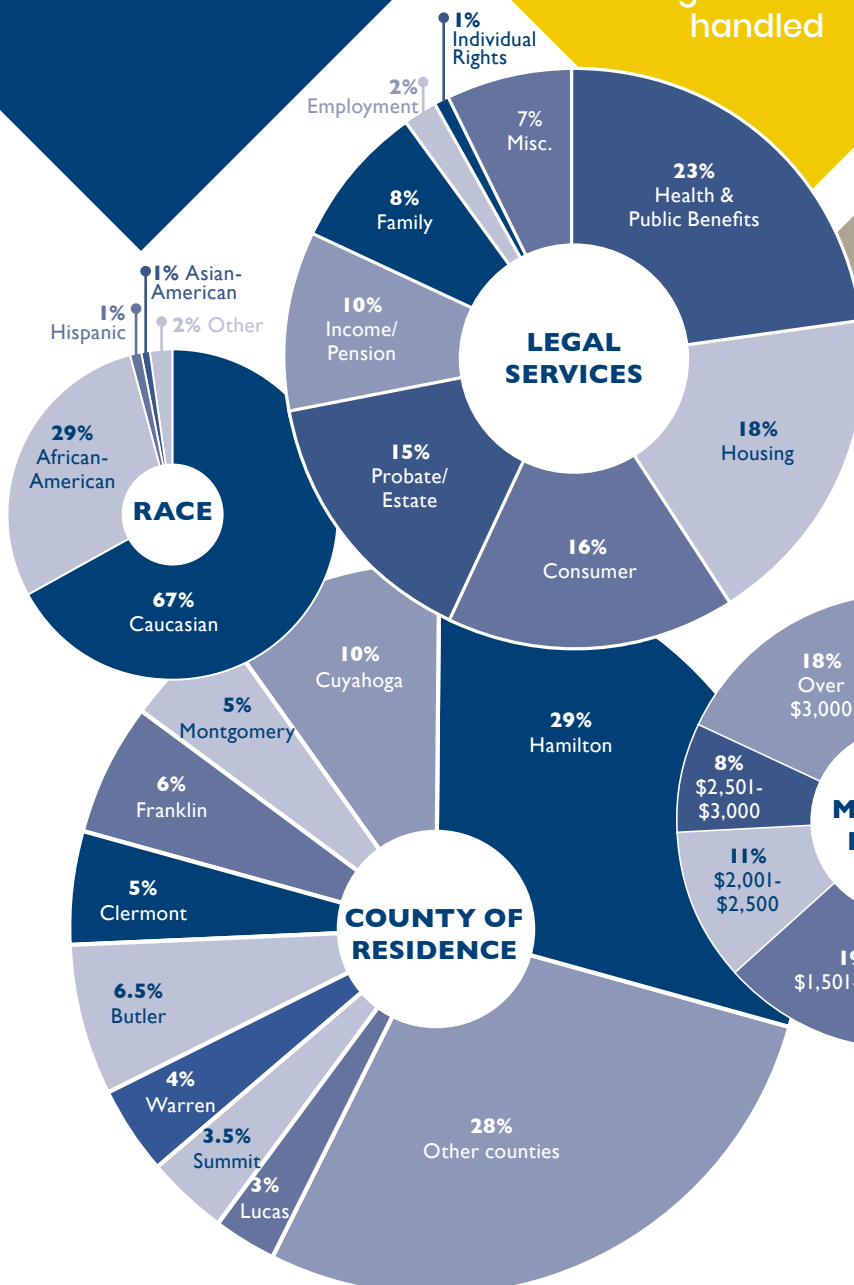
Staff attorney Tracie Hill
preparing for a virtual
community education
presentation.

8,573
legal matters
handled

4,870
clients with
a disability
helped

Staff Attorney Matt Barnes and
Managing Attorney Miriam Sheline
gearing up for a community
education presentation
on long-term Medicaid
eligibility.

7,731
clients
helped





Long-Term Care Ombudsman

Advocates for Excellence in Your Care

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



Members of our amazing Ombudsman Team (from left to right, back row): Linda Kerdolff, Nick Stockburger, Shannon Bryant, Donna Wisowaty, Sue Bell, Carolyn King, Eric Carpenter, Dania Mousa (intern), Mary Anderson (intern) and (left to right, front row) LeVon Pressley and Carla Mason.



Volunteer Cindi Acree-Hamann and Representative Cecil Thomas discussing issues impacting older adults.

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.

11,191
long term care
residents
helped

Complaint Investigation & Resolution

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

4,194
hours of
assistance
& advocacy to
long-term care residents

992
complaints investigated

4,281
hours of complaint investigation

Ohio Senior Medicare Patrol

Joined by a team of volunteers, the Ohio Senior Medicare Patrol (SMP) teaches seniors how to prevent, detect, and report health care fraud, scams, and identity theft. Staff and volunteers provide group education and outreach virtually and in-person at various locations throughout Ohio, including senior centers, retiree gatherings, senior buildings, and partner host organizations.



Our wonderful Ohio SMP Team (from left to right): David Phillips, Susan Marshall, Cathy Rafales, Lisa Dalga, Marihelen Gallagher, and Renee Buchanan.



Volunteers John McCarthy and Mary Hurlburt engaging with community members at a fraud prevention event.

460+

educational presentations to seniors, helping empower older adults to prevent, detect, and report fraud, identity theft, and other scams

34,000+

seniors, families, and caregivers reached through community education programs

66,000+

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



Seniors **Who Rock**

Seniors Who Rock is our one-of-a-kind annual event that celebrates positive images of aging and inspiring older adults who continue to be a vibrant part of the community.

Our remarkable 2023 honorees (from left to right) were Georgia Keith, John Pinney, J.D., and Polly Doran.

Ethical Stewardship

We are proud to be a BBB accredited charity and were thrilled to be named a 2023 Torch Award for Ethics finalist by the BBB in recognition of our character-driven leadership, positive workplace culture, and high-impact community involvement.

We value transparency and work diligently to responsibly steward Pro Seniors' resources. Our audited financial statements and 990 are available on our website.

Total revenue: \$3,301,49
 Program expenses: \$2,511,700
 Administrative expenses: \$453,028
 Fundraising expenses: \$97,159
 Total expenses: \$3,061,887
 Ending net assets (as of 09/30/2023): \$2,111,413



From left to right, Ombudsman Program Director Linda Kerdolff, Executive Director Dimity Orlet and Board President Chad Levin at the BBB Torch Awards Gala.

Donors, Volunteers, & Funders Thank You for Your Support

We are deeply grateful for the generous support
of our volunteers, donors, and funders
who make our work possible.

A full list of volunteers, donors,
and funders can be found
on our website.

Leadership & Staff

Board of Trustees

Chad S. Levin, J.D., *President*
Julia E. Tarvin, J.D., *Vice President*
Helen Fanz LeVay, J.D., *Secretary*
Thomas R. Meyer, CPA
(Inactive), *Treasurer*

Simon T. Buchman, CFP
Ashley Shannon Burke, J.D.
Christine A. Buttress, J.D.
Nancy M. Cassidy
Mary Lynn Creighton, J.D.
Jeffrey Daniher, CFP

Cynthia D. Durkin, CPA
Joshua Goode, J.D.
Jill Gorley, LSW
Michael M. Kennedy
Sandra Jones Mitchell
Esther M. Norton, J.D.

Tyra Oldham, Ph.D.
Ryan O'Leary
Candis M. Smith
Jami Vallandingham, CPA

Staff

Dimity V. Orlet, J.D., *Executive Director*

ADMINISTRATION

Tom Bedall, J.D., *IT Specialist*
Mary Day, *Communications &
Development Director*
Jeremy Koenemann, J.D.,
IT Director

INTAKE AND SUPPORT

Katie Chisholm
Melissa Lake
James Sheline

STAFF ATTORNEYS

Miriam Sheline, J.D.,
Managing Attorney
Matt Barnes, J.D.
Erin Campbell, J.D.
Karen Donnelly, J.D.
Tracy Hill, J.D.
Rose Scollard, J.D.

HELPLINE ATTORNEYS

Mike Walters, J.D.,
Managing Helpline Attorney
Susan Ayers, J.D.
Christopher Bazeley, J.D.
Colleen Bulach, J.D.
Laura Drake, J.D.
Joel Deutch, J.D.
Dayle Donithan, J.D.
Joy Gazaway, J.D.
Maria Hunter, J.D.
Michael Kearns, J.D.
John Labmeier, J.D.
Louise Roselle, J.D.
Thomas Straus, J.D.
Erika Van Ausdall, J.D.
Vanessa Wernicke, J.D.

LONG-TERM CARE OMBUDSMAN

Linda Kerdolff,
Ombudsman Program Director
Eliza Barrett
Susan Bell
Shannon Bryant
S. Eric Carpenter
Dunisha Johnson
Carolyn King
Dixie Koenemann
Carla Mason
Dania Mousa
LeVon Pressley
Stephanie Reardon
Nick Stockburger
Marvin Wilson

OHIO SENIOR MEDICARE PATROL

Cathy Raffles, *Project Director*
Renee Buchanan
Lisa Dalga
Marihelen Gallagher
Susan Marshall
David Phillips



(513) 345-4160
or (800) 488-6070

7162 Reading Road,
Suite 1150, Cincinnati, 45237

www.proseniors.org