

# 2024 Annual Report

*Celebrating 50 Years of Advocacy, Connection, and Impact*



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



Julia E. Tarvin, J.D.  
*Board President*

## Friends,

As we reflect on 2024, we do so with deep pride and gratitude—because 2025 marks Pro Seniors’ 50th anniversary. What began in 1975 as a small, determined effort to protect and empower older adults has grown into a trusted and vital force for justice, dignity, and respect across Ohio.

This milestone invites us not only to look back on five decades of service, but also to celebrate the countless lives we have touched and the meaningful connections we have forged along the way. From protecting the rights of nursing home residents to providing critical legal assistance to older Ohioans facing financial or housing challenges, our vision has remained steadfast: to ensure that all older adults experience justice, safety, and well-being.

We are especially proud of the collaborative spirit that defines this anniversary year. Whether through community partnerships, volunteer engagement, or the support of donors and advocates like you, the strength of our impact has always come from working together. Every conversation, every resolved case, and every moment of advocacy contributes to the tapestry of care and commitment that defines Pro Seniors.

As we look ahead to our next chapter, we remain as dedicated as ever to meeting the evolving needs of older adults with compassion, innovation, and integrity. Thank you for being a part of this journey—past, present, and future.

We are pleased to share our 2024 report, highlighting the impact of our work.

## Our Mission

Pro Seniors is a non-profit organization dedicated to helping older Ohioans resolve legal and long-term care problems and fight Medicare fraud.

## Our Vision

Older Ohioans experience justice, safety and well-being.

# Legal Assistance

## About Our No-Cost Services

### INFORMATION & ADVICE

Pro Seniors' statewide Legal Helpline offers Ohio residents aged 60 and over free access to legal information and advice to help resolve issues that threaten their well-being and financial security.

### REPRESENTATION BEYOND INFORMATION & ADVICE

Our staff attorneys provide legal representation to older adults in Southwest Ohio. These services address complex legal issues rarely handled by private attorneys, including Medicare, Medicaid, Social Security, other public benefits, financial exploitation, consumer law, and housing. Representation may include negotiation or litigation. In addition, our Pension Project assists Ohioans of all ages in securing the retirement benefits they are entitled to receive.

### REFERRAL

When a senior's legal issue cannot be fully resolved through the Legal Helpline or by our staff attorneys, Pro Seniors seeks to connect the client with a private attorney through our Helpline Referral Attorney Panel. In 2024 we referred 1,360 matters to panelists for legal assistance. Over half of these referrals were provided on a reduced-fee or pro bono basis. Referral panelists play a critical role in bridging the justice gap for older Ohioans.

## Our Impact



**13,281**

Legal Helpline appointments



**8,383**

legal matters handled



**7,968**

clients helped



**5,060**

clients with a disability helped



**893**

veteran clients assisted



# Our Clients

## Guided Through Grief Paula's Journey with Pro Seniors

After the loss of her husband, Paula found herself overwhelmed trying to navigate the complexities of widow's benefits, Social Security, and Medicaid. "I had always handled everything," Paula said, "but suddenly, I didn't even understand half of what was happening."

Desperate for help, she reached out to Pro Seniors. She was quickly scheduled for a call with a helpline attorney, who guided her step by step through the application process. "He told me exactly what to do," Paula recalled. "Without them, I don't know what I would've done."

Pro Seniors also supported Paula earlier, when her husband required long-term care. Facing unaffordable facility costs, she turned to them again for help exploring Medicaid eligibility.

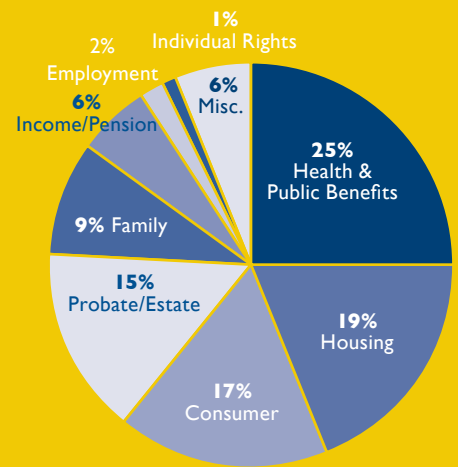
"They were there when I needed them most," Paula says. "All you have to do is call. Tell them what you need—and they'll help you through it."

## Tracy & Lucille's Fight for Housing Stability

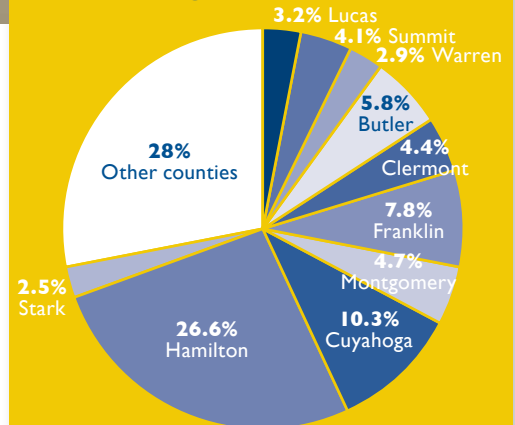
Tracy reached out to Pro Seniors on behalf of her mother, Lucille, a resident of a senior apartment complex. Lucille was experiencing repeated billing errors—her rent was misapplied, and she was even double billed.

Frustrated and unsure where to turn, Tracy connected with Pro Seniors, where a helpline attorney guided her through next steps. The helpline attorney encouraged Tracy to escalate the issue to the executive management for the apartments. Once Tracy contacted management, communication improved immediately, and real action began.

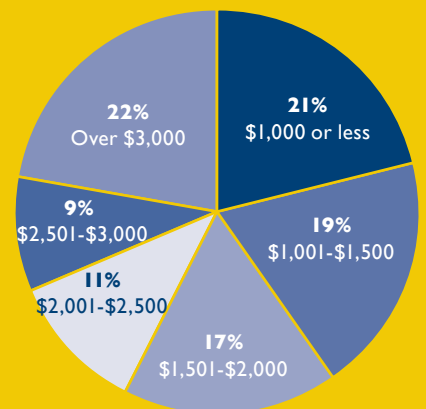
With continued support from the helpline attorney, who offered advice and key resources, Lucille's account was fully audited. The audit confirmed the billing errors which were corrected, finally bringing resolution and peace of mind.



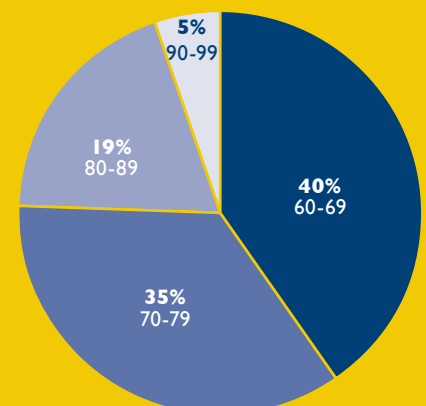
## Legal Issues



## County of Residence



## Monthly Income



## Age



# Long-Term Care Ombudsman

Advocates for Excellence in Your Care

Pro Seniors’ long-term care ombudsmen advocate for quality care and services for individuals receiving long-term care in Butler, Clermont, Clinton, Hamilton, and Warren counties.



Pro Seniors’ Ombudsman team.



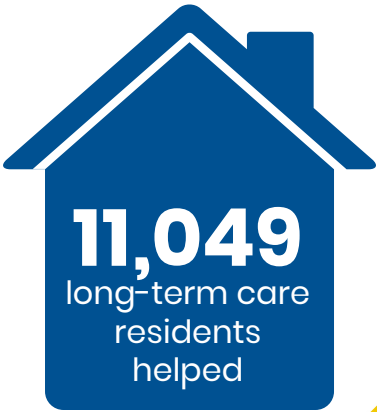
Ombudsman Volunteer Coordinator Nick Stockburger at a community outreach event.



Ombudsman Program Director Eric Carpenter with 2023-2024 Bachelor of Social Work Interns Mary Anderson, Dania Mousa, and Morgan Kinney.

## Selecting Long-Term Care

Our trained ombudsman staff assist individuals and families in evaluating long-term care options. They help identify care needs, and available local services and providers to meet those needs.



## Complaint Investigation & Resolution

Pro Seniors investigates and works to resolve complaints regarding nursing homes, assisted living, home care and long-term care services. We also have a specifically trained ombudsman to assist individuals enrolled in MyCare Ohio, the state’s managed Medicare and Medicaid plans.





The Ohio Senior Medicare Patrol (SMP) empowers older adults to prevent, detect, and report health care fraud, scams, and identity theft. Through a combination of staff and volunteers, SMP provides group education and outreach both virtually and in-person at various locations across Ohio. These include senior centers, retiree events, senior housing, and partner organizations.



Ohio SMP team members Renee Buchanan, Marihelen Gallagher, Cathy Raffles, David Phillips, Jodi Roberts, and Susan Marshall (left to right).



Volunteers John McCarthy and Pat Kincer, joined by their friend 'the transformer,' sharing fraud prevention resources at a community education event.



SMP Program Director Cathy Raffles interviewing then Hamilton County Board of Elections Deputy Direct Alex Linser for her weekly WMKV radio show.



Community members and a service dog share the fun at this inclusive community event.



**739** educational presentations to seniors, helping empower them to prevent, detect, and report fraud, identity theft, and other scams



**71, 973** older adults, families, and caregivers reached through community education programs



**81, 535** pieces of educational literature providing timely, up-to-date information about preventing Medicare fraud and scams distributed



Our one-of-a-kind annual event that celebrates inspiring older adults and challenges ageism by honoring those who continue to lead, contribute and uplift our communities.



Our remarkable 2024 honorees (from left to right below) were Louise Roselle, J.D., Linda Tache, and Dot Christenson.



City Manager Sheryl Long provided opening remarks at Seniors Who Rock.



Staff attorneys Erin Cambell and Matt Barnes joined with Leilani Pelletier and Erin Pettegrew from the State Long-Term Care Ombudsman Office to provide testimony at a public hearing with Ohio Department of Veteran Services regarding proposed rule changes (right to left).



Managing Attorney Miriam Sheline being interviewed for a news story on Medicaid Estate Recovery.



Staff attorney Matt Barnes with 2024 summer legal interns Michelle Hampton (left) and Ava Pinales (right).



## RESPECTED LEADERSHIP

Helpline Managing Attorney Mike Walters received the Ohio Access to Justice Foundation's 2024 Denis J. Murphy Award, an honor presented annually to an Ohio legal aid staff member in recognition of outstanding leadership and advocacy. Over his 25-year career at Pro Seniors, Mike has been a dedicated advocate for older Ohioans. He currently leads a team of 14 Legal Helpline attorneys who assist older adults with civil legal issues. Throughout his tenure, Mike has personally assisted more than 20,000 clients.



## ETHICAL STEWARDSHIP

Pro Seniors is proud to be a BBB-accredited charity and is honored to have been named a finalist for the BBB Torch Award for Ethics for the second consecutive year. This recognition celebrates our commitment to character-driven leadership, a positive workplace culture, and impactful community involvement.



# Donors & Volunteers

We are profoundly grateful for the generous contributions of our volunteers and donors, whose support, along with the vital backing of our funders, makes our work possible.

*A complete list of volunteers and donors is available on our website.*

## Funders

Administration for Community Living

Cincinnati Bar Foundation

City of Cincinnati Human  
Services Fund

Council on Aging of Southwest Ohio

Jewish Home of  
Cincinnati Foundation

Local Initiatives  
Support Corporation

Millstone Fund

Ohio Access to Justice Foundation

Ohio Attorney General

Ohio Department of Aging

United Way Greater Cincinnati

## Financial Stewardship

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

<b>Total Revenue:</b>	<b>\$3,901,760</b>
Program Expenses:	\$3,198,503
Administrative Expenses:	\$408,808
Fundraising Expenses:	\$115,582
Total Expenses:	\$3,722,893
Ending Net Assets	\$2,473,978
	(as of 9/30/2024)

## Board of Trustees

Julia E. Tarvin, J.D., *President*

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*Treasurer*

Jill Gorley, LSW,  
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Mary Lynn Creighton, J.D.

Cynthia D. Durkin, CPA

Joshua Goode, J.D.

Kathy Grant

Tabitha Hochscheid, J.D.

Michael M. Kennedy

Chad S. Levin, J.D.

Esther M. Norton, J.D.

Tyra Oldham, Ph.D.

Ryan O'Leary

Olivia Smith, J.D.

Jami Vallandingham, CPA

Alex Wertz, CFP

## Staff

### ADMINISTRATION/OPERATIONS

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

Tom Bedall, J.D., *IT Specialist*

Mary Day, *Development &  
Communications Director*

Barbara Gilkey, *Staff Accountant*

Jeremy Koenemann, J.D., *IT Director*

### OHIO SENIOR MEDICARE PATROL

Cathy Raffles, *Project Director*

Renee Buchanan

Marihelen Gallagher

Susan Marshall

David Phillips

Jodi Roberts

### LONG-TERM CARE OMBUDSMAN

S. Eric Carpenter, *Program Director*

Susan Bell

Sonja Cheatham

Jessica Hankins

Carolyn King

Dixie Koenemann

Peter Labore

Carla Mason

Dania Mousa

LeVon Pressley

Stephanie Reardon

Nick Stockburger

Brian Wurster

### INTAKE AND SUPPORT

Katie Chisholm

Melissa Lake

James Sheline

Sharon Taphorn

### HELPLINE ATTORNEYS

Mike Walters, J.D.,

*Managing Helpline Attorney*

Susan Ayers, J.D.

Christopher Bazeley, J.D.

Colleen Bulach, J.D.

Joel Deutch, J.D.

Dayle Donithan, J.D.

Laura Drake, 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.

### STAFF ATTORNEYS

Miriam Sheline, J.D.,

*Managing Attorney*

Matt Barnes, J.D.

Erin Campbell, J.D.

Karen Donnelly, J.D.

Rose Scollard, J.D.



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