

All About USS

Annual Report 2024-2025

THE POWER OF PROTECTION

When Frannie's previous guardian passed away, Ursuline Support Services became her successor guardian in August 2022. With a long history of mental illness and estrangement from her family, Frannie was facing eviction because she verbally abused and threatened bodily harm to other residents, and her apartment was in deplorable condition. Because she wasn't taking her medication, Frannie was hostile with the successor guardian during their initial meeting; she was manic, unkept and odorous.

At first, the guardian visited Frannie three times a week to build trust. Frannie had been victimized so many times in her life that it was difficult for her to trust anyone. Three months later, Frannie was evicted. Her apartment was deadbolted and she was unable to remove any personal items. Frannie refused to go anywhere except her boyfriend's apartment outside of the city. Due to the lack of resources, the guardian agreed to allow Frannie to move into the boyfriend's apartment temporarily and replaced her medications, food, and clothing.

During that time, the guardian arranged transportation and accompanied Frannie to her mental health and medical appointments. The guardian applied for 11 apartments with no success. Frannie's explosive behavior disqualified her from a group or personal care home.

After two months of either living with her boyfriend or being un-homed, Frannie attempted an overdose. The guardian involuntarily committed Frannie, who was

restricted to a mental health unit for 10 months, and visited her weekly. Ultimately, Frannie went to a long-term mental health facility where she began to receive appropriate treatment.



After three months at the long-term mental health facility, Frannie was unexpectedly sent to the hospital. The facility then refused to accept Frannie back, saying she needed more care than they could provide. An assessment determined Frannie needed care at a skilled nursing facility. Due to her long history of mental illness, aggressive physical and verbal behaviors, and the fact that she was a smoker and an elopement risk, it was difficult to find a facility.

Upset about going to a long-term care facility instead of an apartment, Frannie began acting out again and was nearly involuntarily committed to the mental health unit of the local hospital. The guardian made multiple visits with Frannie in her new facility to try to calm her down.

The staff at the facility have been very patient with Frannie, creating a daily routine and medication regimen with positive results. She began making

friends for the first time, playing bingo, participating in the garden project, making crafts together, and emotionally supporting each other.

Since moving to the facility, Frannie complies with her medications and mental health treatment. The guardian recently located Frannie’s siblings and is helping Frannie to rebuild those relationships. Frannie still has a very unsteady gait despite months of physical therapy, so she needs to remain at the skilled nursing facility until she improves and can move to a less restrictive environment.

Many share concerns about the restrictions of guardianship, but Frannie’s story shows how guardian limits can unlock opportunities for our most vulnerable neighbors to gain a stronger quality of life.

Disclaimer: Based on a true client story—name changed for privacy.

ANNUAL FINANCIAL REPORT

JULY 1, 2024 - JUNE 30, 2025

INCOME	FY25	FY24
Protective Services*	\$1,606,646	\$1,616,872
Public Guardianship*	\$510,000	\$510,000
Service Coordination		
Eviction Prevention Program**	\$228,369	\$245,592
SLEP**	\$156,529	\$150,007
Community Builders Hillcrest	\$19,624	\$25,000
Manchester Scattered Sites	\$10,000	-
Glen Hazel RAD	\$9,501	\$12,833
On Your Behalf		
Medical Assistance Fees	\$281,100	\$320,300
Fee for Service	\$282,479	\$307,844
Independence Support Programs		
Representative Payee Program	\$47,222	\$41,896
Money Management Program*	\$37,821	\$37,821
Administration/Fundraising***	\$33,341	\$19,661
TOTAL	\$3,222,632	\$3,287,826

*Allegheny County Area Agency on Aging programs (AAA)
** Housing Authority of the City of Pittsburgh programs (HACP)
*** \$227,750 of Administration income & expense is included in the contract amounts of the AAA & HACP programs.
\$84,421 of Administrative income & expense is included in the remaining program budgets.

LEADERSHIP STAFF

- Anthony J. Turo, MPA**
Executive Director
- John A. Daub, MBA**
Director, Finance & Operations
- Melissa Osman**
Director, Protective Services
- Michelle Smart, MS, NPM**
Director, Guardianship & OnYourBehalf Services
- Karen Miller Tobin, Med**
Director, Independence Support Service

EXPENSES	FY25	FY24
Protective Services*	\$1,606,646	\$1,616,896
Public Guardianship*	\$510,000	\$510,001
Service Coordination		
Eviction Prevention Program***	\$236,771	\$255,540
SLEP***	\$155,397	\$150,004
Community Builders Hillcrest	\$21,237	\$25,236
Manchester Scattered Sites	\$8,234	-
Glen Hazel RAD	\$7,465	\$11,420
On Your Behalf		
Fee for Service	\$428,902	\$457,430
Independence Support Programs		
Representative Payee Program	\$47,291	\$41,868
Money Management Program*	\$37,821	\$37,821
Administration/Fundraising***	\$128,907	\$102,374
TOTAL	\$3,188,671	\$3,208,590

URSULINE COMMITS TO STRATEGIC PLANNING

Based on input from staff, board members, funders and the community, the strategic planning process refined the organization's mission and vision to guide the organization's future:

OUR MISSION: *To provide personalized social support and financial guidance with the compassion and care everyone deserves.*

OUR VISION: *Age and ability are no longer barriers to a life of independence, connection, and purpose.*

To deliver our mission and vision, our plan includes three high-level priorities for Ursuline over the next three years:

- 1. Strategic growth in housing support and financial guidance services:** Ursuline will pursue targeted and strategic growth at the intersection of demand in the community, sustainable funding opportunities, and organizational capacity. Service coordination, eviction prevention, guardianship, representative payee, and power of attorney services all align with these criteria.
- 2. Create a data-driven culture:** Improving data systems and supporting their effective use will help Ursuline more reliably track the people it serves, how it serves them, and their outcomes, all while reducing organizational risk. This data is critical to pursuing any program expansion.
- 3. Build a foundation for the future:** As Ursuline anticipates retirements, this strategic plan sets the stage for the next generation of leadership and the organization through succession planning, recruiting new leaders, exploring partnerships with peer organizations, investing in board governance, and strengthening support infrastructure.

The following strategic plan expands the process, the current state of the organization, the details and rationale of each goal, and measurable impacts to achieve before the end of the 2027–2028 fiscal year.

THE PLANNING PROCESS

Beginning in January 2024, Ursuline Support Services engaged Hoffmann Consulting, LLC to facilitate a strategic planning process, beginning with an assessment of the organization:

- Review financials, governance, past strategic plans, HillCap plans and reports, organizational chart, and staffing
- Working sessions with executive director, program leaders, and strategic planning working group
- Staff focus groups (n=32) and interviews (n=7) with participation from every employee at the time
- Board survey (n=10/14, 71% response rate)
- Community stakeholder survey (n=17/40, 43% response rate)
- External stakeholder interviews (n=11)



Photo by: Nate Smallwood for Age-Friendly Greater Pittsburgh

That analysis was the starting point for a strategy retreat with leadership and the Board of Directors that yielded broad consensus on the strategic priorities within this plan. The facilitator then worked with the executive director, program leaders, and strategic planning working group to refine the language of the strategic priorities and create action steps, timelines, metrics, and owners to achieve those priorities over the next three years. The staff reviewed the draft and provided feedback.

The Board of Directors of Ursuline Support Services approved the resulting plan on October 28, 2024.



STRATEGIC PRIORITIES

The following strategic priorities will guide the organization through the end of the 2027–2028 fiscal year:

1. Strategic growth in housing support and financial guidance services

- Grow service coordination and eviction prevention
- Grow financial guidance services and guardianship
- Explore new service lines and funding models

2. Create a data-driven culture

- Strengthen staff capacity to use data
- Invest in data infrastructure

3. Build a foundation for the future

- Formalize succession plans
- Explore partnership opportunities with other providers
- Expand board recruitment and development
- Update training, onboarding, and other organizational policies
- Implement new communication strategies to highlight Ursuline’s impact

These priorities are detailed in a working document with their component objectives, the rationale for these priorities, and key metrics.

The Board of Directors has established a new Strategic Plan Committee to oversee the implementation and monitor the progress through the plan over the next three years.



Photo by: Nate Smallwood for Age-Friendly Greater Pittsburgh

CURRENT STATE OF THE AGENCY

Since its founding in 1981, Ursuline Support Services has provided social and financial support services to older adults and people with disabilities. While the organization and its services have evolved throughout that history, the last few years have marked particular change and resilience since the COVID-19 pandemic.

Gold
Transparency
2024
Candid.

PANDEMIC-ERA CHALLENGES

Ursuline entered the pandemic facing mounting financial challenges: annual operating losses and flat-funded public contracts, and the lingering effects of program losses between 2012 and 2017. Stimulus funds and pandemic grant-making paid off the line of credit, eliminating a major liability. But the core challenge of limited liquidity remains. One such opportunity was the Hillman Capitalization Program (HillCap), providing capital and consulting support to improve the organization's business model. HillCap resulted in creating and growing the *OnYourBehalf* private guardianship model and investment in supporting infrastructure, including implementation of a Salesforce-based data system. While the HillCap support is ending, stakeholders see opportunities for guardianship services to grow, and the fee-for-service model allows for a small margin to reinvest in the organization's capacity.

MAJOR CONTRACT HIKES

Following the pandemic, demand for services also changed. Ursuline is one of three contracted Older Adult Protective Services providers in Allegheny County, a system that saw demand increase by more than 82% across the county from 2019 to 2023. All contracted providers saw major increases to their contracts and a mandate to expand their teams. While all providers faced challenges in hiring and adapting to the demand, Ursuline outperformed its peers in staffing the program and meeting needs. The team tripled in size and became Ursuline's largest program by staff, budget, and reach. However, as a program-funded service with no ability to generate margin, this growth has made little impact on the organization's financial position.

STABILITY THROUGH TRANSITIONS

Independence Support Services (ISS) also grew in the volume served during this period, increasing by 32% from FY 2021–2022 to FY 2023–2024. This growth included expanding service coordination beyond the Housing Authority of the City of Pittsburgh to three other housing communities in Allegheny County. However, these contracts have historically been underfunded, limiting the ability to invest in the team, infrastructure, or cover full costs. As with Guardianship, stakeholders see opportunities for future growth with other housing authorities and private developers for service coordination and eviction prevention. These contracts offer the potential to negotiate higher rates that cover full operating costs and serve as a model for renegotiating with existing payers.

Through these transitions, the organization has maintained a stable team and leadership. With the exception of newly added roles in Protective Services, Ursuline has a median tenure of 6.4 years, more than double that of the human services industry as a whole (per 2022 Bureau of Labor Statistics data.) Even with those new positions, 30% of the organization has been with Ursuline for over a decade, including all leaders. This tenure reflects a strong workplace culture, extensive experience, and institutional knowledge.

BOARD OF DIRECTORS



Since 2014

OFFICERS

Scott Pipitone

Board Chair
Owner/CEO
Pipitone

Nicholas Barone, JD, MBA, MS

Board Vice-Chair
Innovation Manager
Covestro, LLC

Jennett Hafer

Board Secretary
Finance & Strategy Manager
PPG, Inc.

Christopher Albecker, CPA

Board Treasurer
Sr. Mgr., Auditor/Public Accounting
McClintock & Associates P.C.

Robert T. O'Connor

Past Board Chair
Executive Director, GM, Retired
Aetna

Anthony J. Turo, MPA (Non-Voting)

Executive Director
Ursuline Support Services

DIRECTORS

Randy Detweiler

Sr. Community Affairs Analyst,
Retired
PALS (People Able to Lend Support)
Highmark, Inc.

John T. Haller, JD, MPIA, MPA

Technical Manager
Software Engineering Institute
Carnegie Mellon University

Bradford Holden, MBA

CEO
Resilient Lifescience, Inc.

Lisa Kerlik

Sr. Director, AE Brand Marketing
American Eagle Outfitters

David Pollino

Managing Director
Head of Fraud Prevention &
Insider Threats
Bank of New York

Jeffrey T. Sarabok, RN, MBA

Sr. Practice Manager
Hematology, Oncology &
Bone Marrow Transplants
Children's Hospital of Pittsburgh

Nichole E. Sisk

Attorney
Federal Home Loan Bank of
Pittsburgh

Lisa R. Skinner, MSHA, BSN, CMCN

Community Volunteer

Elizabeth A. Zawistowski, MBA

Manager, Enterprise Portfolio
Planning
Bank of New York

THANK YOU FOR YOUR SERVICE

Members Rotated Off the Board Since the Last Annual Report:

Jeanne Givner
Jeffrey Mitch

Jen Martchek
Adele Towers

Sean McCann
Miles Urban

DIRECTORS EMERITI

Jean Robinson, Community Volunteer, Deceased, January 2021

Barbara K. Shore, Ph.D., Retired, University of Pittsburgh School of Social Work, Deceased, October 2018

Guy Tumolo, Retired, Controller's Office, Allegheny County

WHERE EMPATHY MEETS EXPERIENCE

Dear Friends,

The story of my sister, Lisa, has created an especially important place in my heart for the work of Ursuline Support Services. After contracting spinal meningitis at age 2, Lisa's development stalled, but her quality of life never wavered, thanks to the care of my parents and the support she received from the social workers in our hometown. For decades, she has lived in a group home community with a daily routine that gives her purpose and a sense of accomplishment.

This past July, as we celebrated Lisa's 60th birthday, I stepped into the role of Board Chair for Ursuline Support Services. My position follows the dedicated leadership of Bob O'Connor, who has offered years of service and an unwavering commitment to the mission of our organization.

I begin this new chapter with humility, relying on the expertise of Tony Turo, our Executive Director, the talented Ursuline staff, and my fellow Board members. Together, we pursue the spirit of "Where Empathy Meets Experience" through our three key strategic priorities: strategic growth in housing support and financial guidance services; creating a data-driven culture; and building a foundation for the future.

Lisa's experience as a vulnerable adult has deepened my understanding and gratitude for the empathy and experience of leadership and staff of Ursuline. My years as a Board member of Ursuline Support Services and my past partnerships with the Good Grief organization have demonstrated just how far contributions from the community can go.

Looking forward, a financial gift to Ursuline helps us continue to provide the safety, care, and compassion that transform lives like my sister's. Thank you for ensuring our most vulnerable neighbors receive the support they deserve.

With warmest thanks,

Scott Pipitone
Board Chair



THE URSULINE WAY

Dear Community,

In addition to our strategic planning update, we want to share some key points from the “organizational scan,” which compiled information from stakeholder interviews by our consultant, board, and staff:



- **As a sector, human services faces high turnover:** Bureau of Labor Statistics data suggests that median tenure in the field is 3.1 years, compared to 4.1 years in the economy as a whole.
- **Ursuline has a remarkably long-tenured staff with little turnover,** particularly in administrative roles, Guardianship, and Independence Support Services (ISS). Across those programs, median tenure is 6.4 years, exceeding both the sector and economy-wide benchmarks. More notably, every member of our current leadership team has at least 15 years of service with the agency, most with more than 20 years and one with over 30!
- **Staff overwhelmingly see the culture as one of the organization’s greatest strengths,** highlighting that colleagues are reliable, collaborative, and supportive of one another and citing the long tenure of the team. Feedback about supervisors and program leaders is also positive.
- **Ursuline is in a strong competitive position in guardianship:** 40 years of history, a reach across 15 counties, and a contract to serve as the sole provider for older adults in Allegheny County.
- **Pennsylvania will soon require all guardians to be certified,** a change that Ursuline is prepared for, as the agency has been preparing and testing guardians to become National Certified Guardians for nearly two decades. Stakeholders expect this may drive some other providers out of the market, creating opportunities for successor guardianships.
- **Both Housing Authority City of Pittsburgh (HACP) staff and Ursuline staff speak highly of Independence Support Services (ISS) services,** attributing it to personalized attention and relationships with residents.

These examples exemplify the dedicated service based on care and compassion that have characterized our agency for over 40 years.

As Executive Director, I was thrilled with the input of our staff and Board members, along with significant external stakeholders. Their thoughtful feedback will help Ursuline Support Services lay a foundation for the agency’s ongoing service to our community and its most vulnerable neighbors for decades to come!

Sincerely,

Tony Turo

Executive Director

A REFRESHED BRAND FOR A TIMELESS MISSION

This past year, Ursuline Support Services refreshed our brand to reflect our growth and commitment to the community through our visual identity and messaging. A key part of our strategic plan, the brand refresh builds a strong foundation for the future and strengthens how we communicate our mission.

The goal was to create a clear, consistent brand that resonates with our clients, partners, and supporters. The process involved updating our logo, color palette, and tagline to better represent our core values: respect, empathy, professionalism, and transparency.



Our refreshed brand is built on:

- **Our Mission:** To provide personalized support and guidance with compassion and care.
- **Our Vision:** Age and ability do not limit a life of independence, connection and purpose.
- **Our Tagline:** Where empathy meets experience.

This rebrand reinforces our role as advocates and expert support for individuals facing life's challenges.

We are grateful to the Pipitone team for their in-kind support throughout this process. Their expertise and generosity in guiding our re-branding and developing new marketing materials have brought our new vision to life. Thank you, Pipitone, for being a dedicated partner in our mission.



YOUR GIFT MAKES ALL THE DIFFERENCE

As the year comes to an end, we invite you to be part of our mission—helping people like Frannie receive the safety, care, and compassion they deserve.

You can make a difference by joining us on **Give Big Pittsburgh's Giving Tuesday, December 2, 2025**, to make an online gift [here](#), or visit our [Donate](#) page for additional giving options.

Together, we can protect those who cannot protect themselves.

Your gift is tax deductible within the limits of current tax laws. The official registration and financial information of Ursuline Support Services may be obtained from the Pennsylvania Department of State by calling toll free, within Pennsylvania, 1-800-732-0999. Registration does not imply endorsement.



Ursuline Support Services provides personalized social support and financial guidance with the compassion and care everyone deserves.

United Way Donor Designation Code: 281



Ursuline Support Services was awarded this Seal of Excellence by the Pennsylvania Association of Nonprofit Organizations (PANO), under the Standards for Excellence.