The National Council on Aging (NCOA) is a nonprofit service and advocacy organization headquartered in Washington, DC.

Our mission is to improve the lives of millions of older adults, especially those who are vulnerable and disadvantaged, and to act as a national voice for older adults and the community organizations that serve them.

We bring together nonprofit organizations, businesses, and government to develop creative solutions that improve the lives of all older adults.

We work with thousands of organizations across the country to help seniors find jobs and benefits, improve their health, live independently, and remain active in their communities.

For more information, please visit: www.NCOA.org.

**MISSION STATEMENT**

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- Donna Whitt, Senior Vice President & Chief Financial Officer
- Wendy Zenker, Vice President, Benefits Access
NCOA seeks improved health and reduced disability for all older adults. Our goal is that older adults, especially those who are vulnerable and disadvantaged, will improve awareness of and capacity for preventive and self care, and self determination.

**Chronic Disease**

Our Center for Healthy Aging (CHA) is supporting a national effort to promote low-cost, convenient, evidence-based programs that empower older adults to manage their chronic conditions and live healthier lives. In FY10:

- Over 28,000 older adults participated in evidence-based health programs offered by over 300 organizations in more than 1,000 locations nationwide. CHA is the national resource center for the Administration on Aging (AoA) Evidence-Based Disease and Disability Prevention Program.
- NCOA played a lead role in securing $34 million in funds from the American Recovery and Reinvestment Act to expand the Stanford University Chronic Disease Self-Management Program (CDSMP) in 45 states, the District of Columbia, and Puerto Rico. NCOA was named the national resource center to support states as they implement the program.
- We secured funds to support a national study on implementation effectiveness of CDSMP in 22 communities with longitudinal data on nearly 1,200 participants including large numbers of Hispanics and African Americans.
- NCOA launched the nation’s first and only online version of CDSMP. Entitled Better Choices, Better Health®, this free web-based workshop allows thousands of older adults to learn how to manage their symptoms and better communicate with their doctors.

**Falls Prevention**

We lead the Falls Free® Coalition—a national movement to prevent falls and fall-related injuries among older adults. In FY10:

- Over 12,000 older adults participated in evidence-based programs designed to address the risks of falls. More than 175 organizations in 27 states offered programs in 710 locations.

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Improving Health

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- NCOA and its partners in the Falls Free® Coalition maintained the FY09 $1 million increase in federal appropriations to support evidence-based falls prevention programs.

- We continued to lead 31 state falls prevention coalitions, many of which actively participated in the 2010 National Falls Prevention Awareness Day in September. The coalition procured the third annual Senate proclamation for the event.

- We collaborated with the U.S. Centers for Disease Control on a multi-site program to assess the feasibility of widespread replication of two proven falls prevention programs.

Community Health Education

We forge national partnerships to bring critical health information to older adults through education and local events. In FY10, we held:

- *Pack Your Bag* events at 453 senior centers where 9,000 participants received educational materials and more than 2,200 participated in one-on-one counseling on medication management with a CVS pharmacist.

- *Connect the Dots: Diabetes and Your Heart* events in five states to educate seniors on how to reduce their risk for diabetes and hypertension and use Medicare’s preventive benefits.

- Five *Patchwork of Hope Network* events for older adults and two regional train-the-trainer events for professionals to raise awareness about shingles and postherpetic neuralgia, or after-shingles pain.

- Three *Diabetes Screening: Medicare Benefits for Better Health* events to educate aging and health care professionals on the importance of diabetes screening for older adults.

- *A Look Within: What to Know, What to Do, What to Ask* events in eight states to educate seniors on the benefits and risks of medical imaging for individuals with pacemakers.

Mental Health

We seek to bring proven mental health programs to older adults nationwide. In FY10, we:

- Estimate that over 9,000 older adult clients of 33 organizations in 15 states participated in evidence-based community depression care management programs.

- Fostered collaboration among state and local mental health services and the aging services network, resulting in increased allocation of mental health funding to older adults in several states.

- Collaborated with federal agencies and a university to develop an evidence-based medication and alcohol misuse prevention intervention to increase the availability of programming to older adults.
NCOA works to ensure that all older adults, especially those who are vulnerable and disadvantaged, achieve economic security.

Our focus is on providing person-centered, holistic support to help disadvantaged older adults improve their economic status through benefits enrollment, employment and community service, appropriate use of home equity, lower out-of-pocket health expenditures, and reduced incidence of consumer debt, bankruptcies, and foreclosures.

Benefits Access
We help find and enroll older adults in benefits to help them pay for critical needs such as food, housing, and health care. In FY2010:

- Our 10 Benefits Enrollment Centers used person-centered strategies in a coordinated, community-wide system to submit more than 68,000 benefits applications on behalf of financially vulnerable seniors and younger adults with disabilities.
- BenefitsCheckUp®, our free online benefits screening service, helped 213,935 people identify $1.2 billion in public and private benefits for which they were eligible.
- We supported states as they helped over 185,000 low-income Medicare beneficiaries apply for Medicare Part D Extra Help and the Medicare Savings Program—two vital benefits that help pay for prescriptions and health care.
- The Affordable Care Act allocated $5 million to NCOA’s National Center for Benefits Outreach and Enrollment to continue providing technical assistance to organizations conducting benefits outreach and enrollment for Medicare beneficiaries.

Mature Workers
We support two federal programs that provide training and employment opportunities for older adults who want or need to continue working. In FY10:

- Our Senior Community Service Employment Program (SCSEP), funded through the U.S. Department of Labor, served 5,395 participants who provided 3 million hours of community service. A total of 626 participants found permanent employment.
- With extra funding from the American Reinvestment and Recovery Act, we served an additional 1,328 SCSEP participants who provided 557,034 community service hours.
- Through a demonstration grant, we helped 150 older adults complete training to find jobs in direct care and other health care positions. This concluded a three-year demonstration grant that trained a total of 424 older adults.
- Our Senior Environmental Employment Program (SEE), funded through the U.S. Environmental Protection Agency, served an average of 114 participants who supported environmental initiatives.

Economic Casework
In FY10, NCOA launched a national demonstration to help organizations build their capacity to assist economically vulnerable older adults. With support from the Harry and Jeannette Weinberg Foundation, NCOA’s Economic Security Service Centers in eight communities began providing comprehensive, person-centered economic casework to 4,000 seniors over two years. Trained staff at the centers provided one-on-one assistance to help seniors find job training; assistance with health care, housing, and nutrition programs; and financial planning.

Home Equity
We’re a national leader in educating older adults on how they can tap their home equity wisely to stay healthy and independent longer. In FY10, we:

- Successfully counseled 6,891 older homeowners through our new Reverse Mortgage Counseling Services Network.
- Distributed 29,600 copies of NCOA’s reverse mortgage consumer booklet Use Your Home to Stay at Home.
- Created the Reverse Mortgage Counseling Toolkit website, with the new Financial Interview Tool and a customized version of BenefitsCheckUp®. These online tools became a mandatory part of federal reverse mortgage counseling nationwide in September 2010.
NCOA gives community organizations tools, education, and resources to help them meet the growing needs of the older adult population—today and into the future.

Learning Opportunities
We provide opportunities for professionals to learn and share what works when it comes to serving older adults. In FY10, we:

• Co-sponsored the 2010 Aging in America conference in Chicago with the American Society on Aging. Nearly 4,000 professionals attended hundreds of workshops featuring national experts such as Kathleen Sebelius, Secretary of the U.S. Department of Health & Human Services, and aging and longevity expert Dr. Robert Butler.

• Hosted over 30 free webinars on critical topics in aging, allowing more than 4,000 aging services professionals to learn and hear directly from experts from the convenience of their own offices.

• Launched the Aging Exchange website as a collaborative space where aging services professionals could share ideas on how to improve the Older Americans Act. The site garnered more than 2,100 visitors, 200 registrants, 900 votes, 85 ideas, and nearly 100 comments.

• Hosted nearly 2,100 aging services professionals on Crossroads, NCOA’s online community. The community includes groups for senior centers and workforce development professionals, and those serving the spiritual needs of elders. NCOA grantees connect in private groups devoted to economic security, SCSEP, and the Medicare Improvements for Patients and Providers Act. More than 7,300 people have visited the community and viewed nearly 167,000 pages.

Community Action & Volunteering
We develop new models to help nonprofits tap the vast talent, time, and energy of older volunteers. In FY10, we:

• Worked with and evaluated 19 competitively selected community-based subgrantees running exceptional older adult civic engagement programs to define and develop the first set of 21st century standards for older adult volunteering. Over 100 self-directed volunteer teams were developed to tackle community problems.

• Developed a suite of new organizational tools and curricula designed to enable community-based organizations to significantly increase older adult volunteering and utilize the social capital of the boomers to build sustainable capacity, increase services, and strengthen communities.

Senior Centers
We strengthen senior centers by promoting best practices, advocacy, research, and the nation’s only national standards and accreditation program. NCOA’s National Institute of Senior Centers (NISC) is the only national program focused on the needs of senior center professionals. In FY10:

• NISC celebrated 40 years of service to the nation’s 10,000+ senior centers, highlighted by a year-long emphasis on best practices and professional development through a webinar series, conference workshops, electronic and web resources, and online networking and learning opportunities.

• NISC released Building Excellence 2010, the latest edition of the National Senior Center Standards & Accreditation Manual, to advance the quality of senior centers nationally. For the first time, the manual was made available online, so senior center professionals could use it easily to assess their center’s strengths and areas for improvement, and as a guide to becoming a nationally accredited center. During the year, 17 senior centers earned national accreditation.
Health Reform

NCOA successfully advocated for strengthening and protecting major public programs for seniors, including the Patient Protection and Affordable Care Act, which was signed into law in March 2010. The new health reform law will:

• Provide long-term services and supports for older adults who want to remain in their own homes as long as possible, particularly expanding access to home and community-based services.

• Address the needs of chronically ill seniors, through care coordination and evidence-based chronic disease self-management in non-medical, community-based programs.

• Better address the growing problem of elder abuse and neglect through passage of the Elder Justice Act.

• Make improvements to the Medicare prescription drug program.

• Improve access to preventive services.

• Protect and strengthen the Medicare program for the future.

• Make health insurance coverage more available and affordable to those in need who currently lack coverage.

NCOA also launched a successful campaign called Straight Talk for Seniors™ on Health Reform to give older adults “just the facts” on how the new law would affect them. The campaign included a national poll, community presentations, webinars, an online quiz, and a toolkit of fact sheets and information that aging services professionals used to educate hundreds of thousands of seniors nationwide. We also worked with the White House to convene a national town hall summit on health reform for older adults with President Obama and HHS Secretary Kathleen Sebelius.

Long-Term Services & Supports

NCOA chaired a collaborative effort comprised of 20 aging and disability organizations focused on ensuring that long-term services and supports were included in health reform. Members of the collaborative shared strategic and tactical ideas, developed messaging, and met with Congressional staff. The group was successful in ensuring that the CLASS Act, Community First Choice Option, Home and Community Balanced Incentives Program, and spousal impoverishment protections for Medicaid home and community-based services beneficiaries were included in the law.

Older Americans Act

We advocate for OAA funding for critical services that keep older adults healthy and independent, such as meals, job training, caregiver support, transportation, and health promotion. In FY10, we:

• Successfully advocated for a 13% increase in FY10 OAA appropriations, including an historic increase of $253.5 million for the Senior Community Service Employment Program (SCSEP).

• Secured first-time dedicated funding of nearly $1 million for the Multi-Generational Civic Engagement Program, which was first authorized in 2006.
NCOA continued to generate positive changes in Unrestricted Net Assets for fiscal year 2010. The net change in Unrestricted Assets was a positive $24,000 for fiscal year 2010, after including an $82,000 positive pension plan related adjustment. This compares to the prior year’s net loss of $830,000, which had included an extraordinary, negative pension related adjustment of $1.06 million. The total Unrestricted Net Assets grew from $1.33 million at the end of 2009 to $1.35 million at the end of fiscal year 2010.

The operating revenues for 2010 amounted to $58.5 million, which was a 19.1% increase over the prior year amount. In 2010, federal grants accounted for 85% of the funding, which included approximately $7.4 million in added economic stimulus add-ons to the Department of Labor-supported Senior Community Service Employment Program. For 2010, as in previous years, NCOA continued to maximize resources used to support the organization’s core mission, expending 95% of its operating resources on direct programs.

The following charts present the highlights of the revenue and expenditure distributions by categories for fiscal year 2010. Full Audited Financial Statements for fiscal year 2010 with comparisons to 2009 are available on NCOA’s website at www.NCOA.org.
# NCOA Consolidated Statement of Changes in Unrestricted Net Assets

<table>
<thead>
<tr>
<th>Revenue and other support:</th>
<th>2010</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government Grants and Contracts</td>
<td>$49,841,021</td>
<td>$38,980,700</td>
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<tr>
<td>Foundation and Corporate Grants and Contracts</td>
<td>6,944,804</td>
<td>8,055,980</td>
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<td>Membership Services and Conference Revenues</td>
<td>446,601</td>
<td>546,398</td>
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<tr>
<td>Contributions and Other Income</td>
<td>1,078,725</td>
<td>1,232,116</td>
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<tr>
<td>Investment Income</td>
<td>52,882</td>
<td>130,685</td>
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<tr>
<td>Other Income</td>
<td>156,589</td>
<td>192,500</td>
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<tr>
<td><strong>Total Revenue and Other Support</strong></td>
<td><strong>58,520,622</strong></td>
<td><strong>49,138,379</strong></td>
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</table>

<table>
<thead>
<tr>
<th>Operating Expenses:</th>
<th>2010</th>
<th>2009</th>
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<tbody>
<tr>
<td>Healthy Aging Programs</td>
<td>2,936,679</td>
<td>3,663,280</td>
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<tr>
<td>Access to Benefits</td>
<td>2,474,651</td>
<td>3,539,979</td>
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<tr>
<td>Workforce Development</td>
<td>43,756,636</td>
<td>33,926,051</td>
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<tr>
<td>Civic Engagement</td>
<td>1,710,336</td>
<td>2,768,822</td>
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<tr>
<td>Long-Term Services and Supports</td>
<td>1,562,450</td>
<td>539,278</td>
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<tr>
<td>Healthy Aging Social Enterprises</td>
<td>429,963</td>
<td>120,392</td>
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<td>Shared Services</td>
<td>1,869,459</td>
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<td>Innovations and Incubator Programs</td>
<td>61,536</td>
<td>176,286</td>
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<td>Public Policy and Advocacy</td>
<td>958,565</td>
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<td>Management and General</td>
<td>2,543,340</td>
<td>2,119,318</td>
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<tr>
<td>Fundraising</td>
<td>274,572</td>
<td>29,430</td>
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<tr>
<td><strong>Total Operating Expenses</strong></td>
<td><strong>58,578,187</strong></td>
<td><strong>48,912,807</strong></td>
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</table>

<table>
<thead>
<tr>
<th>Net Operating (Unrestricted) Results</th>
<th><strong>(57,565)</strong></th>
<th><strong>$225,572</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Other Comprehensive Income (Loss)</td>
<td>82,019</td>
<td>(1,055,740)</td>
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</tbody>
</table>

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<thead>
<tr>
<th>Net Change in Unrestricted Net Assets</th>
<th><strong>24,454</strong></th>
<th><strong>(830,168)</strong></th>
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<tbody>
<tr>
<td>Unrestricted Net Assets at Beginning of Year</td>
<td>1,326,268</td>
<td>2,156,436</td>
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<tr>
<td>Unrestricted Net Assets at End of Year</td>
<td>$1,350,722</td>
<td>$1,326,268</td>
</tr>
</tbody>
</table>


- Consolidated Audited Financial Statements
- NCOA (Parent Only) Financial Statements
- NCOA (Parent Only) Form 990
- NCOA Foundation Form 990EZ
LEADERSHIP COUNCIL

- W. Andrew Achenbaum, University of Houston
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- The Harry and Jeanette Weinberg Foundation
- MetLife Foundation
- The SCAN Foundation
- The California HealthCare Foundation
- AARP Foundation
- The Archstone Foundation
- The Retirement Research Foundation
- Wallerstein Foundation
- The Virginia G. Piper Charitable Trust
- Goodwill of San Francisco
- MacArthur Foundation
- The John A. Hartford Foundation
- The Margaret A. Cargill Foundation

Government
- U.S. Department of Labor
- U.S. Environmental Protection Agency
- U.S. Administration on Aging
- U.S. Department of Housing & Urban Development
- U.S. Centers for Medicare & Medicaid Services
- U.S. Corporation for National & Community Service
- U.S. Substance Abuse & Mental Health Services Administration

U.S. Centers for Disease Control & Prevention
U.S. Agency for Healthcare Research and Quality

Other Supporting Partners
- Financial Industry Regulatory Authority Investor Education Foundation
- University of Colorado at Denver and Health Sciences Center
- State and Territorial Injury Prevention Directors Association
- Expert Patient Programme Community Interest Company
- Group Health Cooperative
- National Association of Area Agencies on Aging
- Benefits Data Trust

Corporations
- AstraZeneca Pharmaceuticals LP
- CVS/Caremark
- Sanofi-Aventis
- Medtronic
- Novartis Pharmaceuticals
- Novo Nordisk, Inc.
- Alberta Health
- WellPoint, Inc.
- Endo Pharmaceuticals
- The Lewin Group

- Merck
- Coventry Health Care, Inc.
- First Health Services Corporation (EPIC)
- Kaiser Permanente/Kaiser Foundation Health Plan, Inc.
- Independent Living Systems
- AGIS Networks Inc.
- Pfizer Inc.
- JP Morgan Chase Bank, NA.
- Humana Active Outlook, Inc.
- MetCare of Florida, Inc.
- Addus HealthCare
- Walmart
- Public Consulting Group
- Cardinal Point Communications
- GlaxoSmithKline
- Wells Fargo
- HealthTrust
- Mathematica
- Human Arc Corporation
- Eye Care America
- Philips LifeLine
- Volunteer Match
- Harris Private Bank
- Wellcare
- Cellular Recycler
- Care.com

Other Major Donors
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