Mission

To improve the lives of older Americans

Core Values

- Social and economic justice
- Respect and caring for all
- Innovation
- Excellence and integrity

Core Competencies

Collaborative Leadership
- Creating and leading strategic alliances, coalitions, and multi-sector partnerships
- Organizing, mobilizing, and supporting nationwide “communities” of organizations and leaders

Innovation
- Fostering and diffusing innovations
- Making markets work better for older adults

Advocacy
- Improving public policies by:
  - Being a national voice for older adults in greatest need and those who serve them
  - Combining community service and advocacy
  - Empowering and engaging older adults

Impact Areas

For all older adults, with special focus on those who are disadvantaged and/or vulnerable:

Healthy Aging
- Improved health and reduced disability

Workforce Development
- Increased participation in meaningful and rewarding work

Civic Engagement
- Increased community service that enriches participants and is productive for society

Access to Benefits
- Increased access to public and private benefits and resources

Long-Term Services and Supports
- Enhanced capacity to live in communities with dignity, choice, and financial security

Who We Are

The National Council on Aging is a nonprofit service and advocacy organization headquartered in Washington, DC. NCOA is a national voice for older Americans—especially those who are vulnerable and disadvantaged—and the community organizations that serve them. It brings together nonprofit organizations, businesses and government to develop creative solutions that improve the lives of all older adults. NCOA works 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, visit www.ncoa.org.
National Vision, Local Impact

By James Firman, President & CEO and Monsignor Charles Fahey, Chair

A troubled national economy creates serious economic and social challenges for all older Americans. Stories of vulnerable seniors who are losing their homes, struggling to make ends meet, or who are concerned about the future of their retirement savings make headlines daily.

The National Council on Aging (NCOA) is prepared to address these challenges in collaboration with the thousands of community organizations that serve the country’s seniors and with the support of many partners who make it possible for us to do our vital work.

Since 1950, NCOA has been improving the lives of older Americans. We are proud of what we’ve been able to accomplish through collaborative leadership, innovation, and advocacy. We have achieved success by combining the capacity to develop compelling national visions for aging in America with a deep passion for local impact.

These perspectives and strengths will guide us as we face nearly unprecedented economic and social challenges for older Americans and for the millions of baby boomers who are entering their third age. In the years ahead:

- NCOA will continue to be a trusted national advocate on behalf of older Americans—especially disadvantaged and vulnerable elders—and the community organizations that help them.
- NCOA will continue to work with our thousands of community partners to make sure that the basic needs of older adults are met each day.
- NCOA will continue to work with national and local supporters to develop creative evidence-based strategies, to take them to scale nationwide, and to advocate for public policies that support proven and effective programs that address real needs.

Whereas many view the aging of America primarily as a crisis, NCOA views it primarily as an opportunity. We firmly believe that older Americans are the key to addressing many of the challenges posed by the aging of society. Through helping older people to remain healthy, financially secure, and more engaged, we will greatly strengthen the social, civic, and economic fabric of society and improve the welfare of all Americans.

Over the past few years, NCOA has been committed to transforming itself from a “very good” organization to a “great” one. This transformation has prepared NCOA for the big job now ahead of us, allowing NCOA to do much more not just for older Americans but for all of society.

Thank you for your support of NCOA, allowing us to become an even greater force for good. We can’t succeed without you!
Benefits for Seniors

Helping older Americans access benefits that improve the quality of their lives...

Mission & Goals

NCOA believes that all older Americans—particularly disadvantaged and vulnerable elders—who need, want, and are eligible for public benefits should receive them. Yet, decades after their inception, public benefits programs are remarkably under-subscribed. Millions of seniors and younger adults with disabilities who have limited income and resources qualify for programs that help pay for medications, healthcare, food, or heat, but they are not enrolled in them.

NCOA is implementing 21st century solutions to this pressing social policy issue. Through a network of community-based organizations and innovations in technology, NCOA is providing outreach, education, eligibility screening, and enrollment assistance to older adults nationwide. NCOA leads a nationwide network that advocates for improved access to benefits so that people with limited resources get all benefits for which they qualify in the most seamless and cost-efficient way possible.

Making a Difference

Maria Ibarra’s Story

Maria Ibarra is accustomed to helping people. As a health coach with a master’s degree in public health, she talks with people daily about improving their lives. But the task of helping two elderly members of her own family who needed help proved to be a challenge.

“I have an elderly father-in-law who moved in with us, and I am helping him find employment, as well as resources like food stamps that he may be eligible for,” Ibarra said. “I am also helping my 87-year-old dad locate adult housing and home care options.”

Ibarra spent considerable time on the Internet looking for information but did not find the help she needed. Then she read about BenefitsCheckUp® in a local Florida newspaper.

“BenefitsCheckUp® was easy to navigate, and I found so many resources I did not know about,” she said. “It centralizes everything, so I saved a lot of time by not having to visit a lot of different Web sites. It’s great for me because my elders are relying on me for information.”

Ibarra, who is Hispanic, found BenefitsCheckUp® to be friendly for people of all backgrounds. “It appeals to all cultures and includes resources for everybody, which I found very welcoming.”
**Key Accomplishments**

**Collaborative Leadership**

NCOA leads the Access to Benefits Coalition, a nationwide network of hundreds of community-based organizations that help seniors and younger people with disabilities get the prescription drug benefits for which they are eligible. Through this network, nearly 255,000 people have been enrolled in Medicare’s Extra Help and related benefits, including over 91,000 people in fiscal year 2008 alone.

In 2008, NCOA was designated as the National Center for Benefits Outreach and Enrollment by the U.S. Administration on Aging (AoA). Through this center, NCOA will remain at the forefront of continuous innovation, learning, and sharing of best practices to find and enroll people in benefits.

NCOA’s partnership with AstraZeneca Pharmaceuticals expanded in 2008 to include an online community for professionals and volunteers who work with Medicare beneficiaries. The My Medicare Community now has over 1,400 members and is growing steadily. For consumers, the My Medicare Matters Web sites continue to provide credible, easy-to-use information about Medicare in English and Spanish.

Early in 2008, NCOA also joined key nonprofit partners to ensure that seniors were included in Congress’ economic stimulus package. Following passage, NCOA worked with the Internal Revenue Service to make sure that as many as possible of the eligible 20.5 million low-income seniors and veterans with disabilities received their payments. With AARP Tax-Aide, NCOA created and publicized an Economic Stimulus Payment tool that helped more than 58,000 people apply for the payment, amounting to nearly $17 million in short-term fiscal relief to low-income older Americans. More than 80 percent of eligible people who would normally not need to file taxes received their stimulus payment.

“I have signed up for all of the benefits access programs that NCOA offers and encourage all of our State Health Insurance Program (SHIP) counselors to do the same. I think they are a great asset.”

—Brian Kelly, Montana SHIP Program Officer, Helena, MT

**Innovation**

Since 2001, NCOA has conducted more than 2.2 million screenings and identified more than $6.7 billion in benefits for older adults through BenefitsCheckUp®, a free Web-based service that screens individuals for more than 1,550 benefits programs.

In 2008, NCOA also issued a final report on its two-year national demonstration program in which community organizations reached out to more than 40,000 Medicare beneficiaries with limited income and resources and helped them apply for the Medicare Extra Help and related benefits. NCOA has shared the lessons learned from this program, along with an accompanying electronic toolkit, with community-based organizations nationwide, so they too can adopt these innovative strategies.

**Advocacy**

NCOA is a leading advocate for improving seniors’ access to benefits. It created and achieved federal funding for the National Center for Benefits Outreach and Enrollment. NCOA and grassroots advocates also played a pivotal role in the 2008 passage of the Medicare Improvements for Patients and Providers Act. This legislation included the most significant improvement to Medicare for low-income beneficiaries in decades, totaling an estimated $4 billion over five years. Additional funds were included for low-income outreach and assistance for area agencies on aging, state health insurance assistance programs, and aging and disability resource centers.
Healthy Aging

Advancing proven programs that help older Americans remain healthy and vital…

Mission & Goals
NCOA continues its work to help older Americans live healthier lives by increasing the quality and accessibility of health programming in communities nationwide. Older Americans are disproportionately affected by chronic diseases and conditions that account for seven of every 10 deaths and more than three-quarters of all health expenditures in the United States.

Research shows that specific interventions can have a significant impact on older adults’ health, yet many seniors simply don’t have access to programs that can provide these benefits. NCOA believes that the 29,000 community-based organizations currently reaching 7 to 10 million older adults each year are a valuable and untapped resource in offering these evidence-based programs. Through its Center for Healthy Aging, NCOA is working to identify, translate, and disseminate evidence on what works in areas such as mental health, fall prevention, chronic disease self-management, physical activity, and healthy eating.

Making a Difference

Alice & Paul Rose’s Story

After 67 years of marriage, Alice and Paul Rose found they needed more than just each other to lean on. To help them maintain their balance and prevent falls, the couple enrolled in A Matter of Balance at the Fairhill Center, a Cleveland nonprofit that offers programs and resources to help older adults age successfully.

“I was fearful of walking because I always need something near me, some type of support,” Paul Rose said. He uses a walker and also needs assistance getting in and out of a chair.

As a participant in A Matter of Balance, Rose learned to cope with his fear of falling and enhance his balance through group discussion, exercises, and support. The eight-week, evidence-based course is taught by trained volunteers, often older adults themselves.

“I learned that I have to have the initiative to move about every day,” Rose said. “They gave me a booklet of instructions with exercises, and it’s up to me to have the initiative and motivation to do them.” As a former physical education instructor and coach, Rose appreciated learning tips that could help him help himself. “I learned that I’m not alone, but I just have more experience,” he said.
Key Accomplishments

Collaborative Leadership
In 2008, NCOA convened partner organizations to address one of the most prevalent mental health issues facing older Americans—depression. Depression in seniors often goes unrecognized and untreated, yet it can severely affect quality of life and complicate the treatment of chronic diseases. With government and other partners, NCOA helped organize a national conference, convene an expert meeting, and host a series of Webinars—all designed to make it easier for local organizations to access proven programs that help older adults identify and manage depression and its symptoms.

NCOA also continued to work with state and national partners to address falls, a major public health concern. The Falls Free National Advisory Group led by NCOA continued to advance a legislative strategy and identify and promote best practices to reduce falls among older adults. NCOA briefed Congress about the staggering cost of falls and how they can be prevented and hosted the State Coalitions on Fall Prevention Workgroup. CEO James Firman promoted NCOA’s work in a segment about fall prevention on ABC’s Good Morning America.

Innovation
NCOA continues to advance the use of proven programs to help older adults improve the quality of their lives. Through a public-private partnership that includes the U.S. Administration on Aging (AoA), NCOA, and the Atlantic Philanthropies, Stanford’s Chronic Disease Self-Management Program (CDSMP) helped more than 10,000 diverse older adults better manage their chronic conditions. NCOA is working with Stanford to promote the online version of CDSMP, so this valuable program can reach even more elders.

NCOA also is promoting the use of Healthy IDEAS (Identifying Depression, Empowering Activities for Seniors), developed at Baylor College of Medicine’s Huffington Center on Aging with Care for Elders in Houston. It allows local organizations to screen older clients for depression, educate them about its signs and symptoms, provide links to mental healthcare, and empower them to make behavioral changes that can improve their quality of life. This program became available for national distribution last year and is now available in 10 states.

Advocacy
NCOA is a national voice for the importance of older adult health programming based on proven scientific evidence. Thanks to its work, evidence-based health programming is now a major component of the Older Americans Act strategy to modernize health and long-term care for older adults.

In 2008, NCOA also worked successfully to pass the Keeping Seniors Safe from Falls Act, which authorizes demonstration programs, research, and public education to prevent senior falls. The bill incorporates recommendations from the NCOA-led Falls Free National Action Plan.

“Healthy IDEAS was the answer to our prayers. We knew we wanted to address depression, and this was an evidence-based intervention with proven results. Healthy IDEAS fits well into our case management program and really helped reduce our clients’ depression and pain.”

—Jan Edwards, Director, Case Management Services, Sheltering Arms Senior Services, Houston, TX
Civic Engagement

Helping older Americans stay active and engaged in their communities...

Mission & Goals
NCOA believes that older adults can play an integral role in solving communities’ critical social problems. The impending retirement of the baby boom generation offers an unprecedented opportunity to tap into these individuals’ skills, time, and desire to stay actively engaged in their communities. NCOA works to identify and disseminate innovative programs that help nonprofit organizations tap older adults as valuable volunteers.

Making a Difference

Faye Lee’s Story
Even before she retired from her job at Toyota Financial Services, Faye Lee was thinking about where she wanted to volunteer. Like many retirees in her Phoenix neighborhood, she chose Sun Health, an established hospital with a well-organized volunteer team.

Yet, at 55, Lee wasn’t content with the traditional volunteer assignments. She had lots of energy and professional experience, and she wanted to make a difference. “If you put me behind an information desk all day, I’d go crazy,” Lee admitted.

Recognizing her enthusiasm and skills, Sun Health asked Lee to take the lead in changing the way volunteers worked throughout the hospital. Sun Health is a participant in NCOA’s RespectAbility initiative, which is helping nonprofits find new ways to engage older volunteers in professional-level roles.

Lee soon became a “roving ambassador,” acting as a liaison between staff and volunteers to help both sides find ways to tap into volunteers’ abilities and energy. She sparked a dialogue with employees about how volunteers could play a more integral part in their work.

“We were looking to bust the roof off of what the word ‘volunteer’ means,” Lee explained. It didn’t take long for staff to realize the immense potential of volunteers. Several units now have their own “roving ambassadors” who are fully engaged members of the care team. Lee also developed a leadership manual and training program to help volunteers grow.

“Being part of this program has given me the opportunity to go after my passion and make a change that can really help people,” Lee said.
Key Accomplishments

Collaborative Leadership
Using a government grant as a springboard, NCOA provided training and technical assistance to projects across the country that serve grandparents raising grandchildren, parents raising children with special needs, and caregivers of frail elders. In 2008, NCOA formed a multi-sector partnership with the Corporation for National and Community Service, the Atlantic Philanthropies, and MetLife Foundation to further expand this initiative to effective programs that have the potential for wide-scale replication.

Innovation
NCOA’s RespectAbility initiative is on the cutting edge of social media, having launched its online community in 2008. The Continuous Learning and Innovations Community (CLIC) networks organizations that have an interest in promoting civic engagement among seniors. On CLIC, professionals can share, learn, and exchange resources and information. RespectAbility also created a Web-based Standardized Metrics and Results Tracking System, a tool that helps nonprofit organizations demonstrate the return on investing in older adults as a new talent pool.

NCOA’s Wisdom Works: Building Better Communities initiative, meanwhile, has proven successful in helping senior centers attract new, younger senior volunteers to work in teams to address critical issues such as West Nile Virus and childhood obesity. Wisdom Works, funded by MetLife Foundation, also developed a training curriculum that nonprofits can use to replicate the self-directed team model in their own organizations.

Advocacy
NCOA successfully advocated for including provisions for a Silver Scholarship Program in both Senate and House bills to reauthorize the National and Community Service Act. The program awards seniors who volunteer for at least 500 hours of tutoring, mentoring, or caregiving activities with a $1,000 transferable education award.

“As we've implemented our own civic engagement initiative, NCOA has provided us with great support, technical assistance, and resources—including an amazing coach and access to field experts around the country.”

—Ann Curtice Rich, Executive Director, Chicago Life Opportunities Initiative, Chicago
Workforce Development

Fostering meaningful work opportunities for older adults...

Mission & Goals
NCOA is working to increase older adults’ participation in meaningful and rewarding paid employment. NCOA is one of 18 national sponsors of the Senior Community Service Employment Program (SCSEP), which provides job training and unsubsidized employment opportunities for low-income workers aged 55 and older. NCOA also has created MaturityWorks Alliance (MWA) to work with community groups and leaders on older worker issues.

Key Accomplishments

Collaborative Leadership
In fiscal year 2008, NCOA projects served more than 5,500 mature workers and placed 1,056 into unsubsidized employment opportunities ranging from clerical and library aides to healthcare workers. NCOA also served 130 enrollees in positions for adults aged 55 and over that support environmental activities through the Senior Environmental Employment (SEE) program funded by U.S. Environmental Protection Agency (EPA).

Advocacy
MaturityWorks Alliance continues to serve as a national voice and advocate for public policies, business practices, and societal attitudes that enable employers to recruit, retain, and value mature workers. In 2008, MWA offered a Workforce Summit and a series of Webinars on aging workforce issues, including strategies for managing, training, and retaining older workers. MWA also reviewed and submitted comments to the U.S. Department of Labor on proposed regulations for SCSEP, and members met with congressional staff on key aging workforce legislation throughout the year.
Making a Difference

Leo Corben’s Story
If you ask Leo Corben when he plans to retire, he will gladly tell you that he has “never tried it and never will.” After spending a highly successful career managing advanced research at Polaroid and then as a consultant, Corben found a new niche at an EPA lab in North Chelmsford, MA.

Corben participates in NCOA’s SEE program, which matches highly trained older adults with jobs that support the EPA’s environmental activities. According to Corben, the program is “the greatest thing ever invented.” The government benefits from experienced workers, while older adults have the chance to earn money and continue to contribute their knowledge to society.

“It tickles my brain just enough, and I’m interacting with the world every day. I’m in the stream of life here,” Corben said. He works 40 hours a week and plans to do so indefinitely. “When you’re highly educated and experienced, what else is there for you to do?” he asked.

Katherine Dean’s Story
Katherine Dean has always been an active woman. Growing up in Bermuda, she ran track, played cricket, raised three sons, and went to school. She came to the U.S. in 1957 to finish school as a dental assistant. Upon completion, she began working for a dental practice in the Washington, DC area, where she continued to work for over 50 years. Dean finally thought she was ready to retire.

“I only stopped working about three weeks,” Dean said. “I’m just not a sit-at-home person. So I headed to a senior citizens center in my area looking for something to get me out of the house one or two days per week.”

There, she was introduced to Wanda Moore-Johnson, NCOA’s vice president of human resources, who mentioned that NCOA could use some help packing for an office move. Soon afterward, NCOA’s receptionist retired and Dean was asked to come on board full time.

Five years later, Dean, 85, loves coming to work every day and has no plans to retire. “It’s just nice to be here and greet people. I’m everybody’s grandmother.”
Long-Term Services & Supports

Promoting programs that keep seniors independent...

Mission & Goals
NCOA supports efforts to allow all older Americans to remain independent and in their own homes and communities for as long as possible. Since aging services organizations play a critical role in delivering services that can help seniors stay healthy and living on their own, NCOA continues its leadership as a national advocate for increased funding for OAA programs and also leads initiatives that educate older homeowners who wish to tap the equity in their homes to help them remain independent.

Key Accomplishments

Collaborative Leadership
In 2008, NCOA created and gained broad support for a set of principles for financing long-term care services and supports. Both the Leadership Council of Aging Organizations and the Consortium of Citizens with Disabilities, which together represent over 150 national organizations, endorsed the NCOA principles.

In order to protect older consumers, NCOA also worked with the U.S. Department of Housing & Urban Development (HUD) and the reverse mortgage industry to establish the National Housing Counseling Association. It has already stabilized and improved counseling on reverse mortgages. NCOA also helped the Financial Planning Association inform financial planners about how reverse mortgages can be used to support community living.

Innovation
With a grant from HUD, NCOA formed a partnership with AoA and Money Management International to create the Reverse Mortgage Counseling Services Network. The network brings aging and disability resource centers and area agencies on aging into the reverse mortgage consumer counseling arena. Members provide counseling to seniors, explaining terms and financial implications of reverse mortgages, as well as alternatives to a loan. In 2008, NCOA also secured agreements with HUD and AoA to develop a pilot program to make reverse mortgages a better value for vulnerable seniors. NCOA also completed a consumer study on factors that can influence the use of reverse mortgages to age in place.

Advocacy
NCOA is a leading national advocate for the Older Americans Act. OAA is the backbone of services to America’s aging population, funding services such as meals programs, senior centers, older worker programs, and caregiver support. Through grassroots advocacy, more than 1,100 e-mails were generated to members of Congress in which NCOA activists told their personal stories of why OAA funding is critical to their communities. Congress approved $111 million in increases to the OAA for fiscal year 2008.

“NCOA is a powerful advocate for older adults and the organizations that serve them. Their leadership, expertise, and unflagging commitment played a major role in passing legislation that will directly benefit people with Medicare and provide much-needed support for on-the-ground aging and disability service providers.”

—Jon Lavin, CEO, Age Options, Oak Park, IL
Membership

Mission & Goals
NCOA seeks to support aging services professionals by offering members access to timely news and information, best practices in the field, educational opportunities, and interest groups designed to enhance their professional development.

Accomplishments
Approximately 4,100 people attended the joint American Society on Aging-NCOA annual conference in Washington, DC. A stirring keynote presentation by poet and author Maya Angelou was the highlight of the meeting, and NCOA’s video “Aging in America” received a standing ovation.

Throughout 2008, more than 1,600 individuals participated in NCOA’s Healthy Aging Briefing Webinar series, in which national experts discussed current topics such as cutting-edge senior center programming, fall prevention, medication use among seniors, civic engagement, and caregiver resources.

The National Institute of Senior Centers (NISC), one of NCOA’s interest groups, accredited or reaccredited its 160th senior center in 2008. The first-annual Prescription for Better Health Contest honored senior centers for developing best practices in health programming.

NCOA’s electronic communications such as NCOA Week, Benefits Alert, Public Policy Update, and Senior Center Voice continued to keep members up-to-date on critical issues related to the field, and NCOA’s magazine Innovations won additional awards for its coverage and design.
Finance

Goals & Accomplishments
NCOA continued to generate positive changes in operating net assets in fiscal year 2008, extending to six straight years positive growth in unrestricted net assets (before required pension plan related adjustments). The pension plan-related adjustments are now required each year due to new accounting rules implemented with the Pension Protection Act of 2006. The net change in unrestricted assets before this adjustment was a positive $68,000 for fiscal year 2008, compared to $501,000 the prior year. With the adjustments for the pension plan, the net change in unrestricted net assets for fiscal year 2008 was a net negative $424,000, bringing the balance in unrestricted net assets at the end of 2008 to $2.16 million.

Operating revenues for 2008 amounted to $44.3 million, which was a 7.6 percent increase over the prior year amount. In 2008, federal grants accounted for 75 percent of the funding, as NCOA continues to diversify and raise revenue from non-governmental sources. For 2008, as in previous years, NCOA continued to maximize resources used to support the organization’s core mission, expending 95 percent of its operating resources on direct programs.

Full audited financial statements for fiscal year 2008 with comparisons to 2007 are available on NCOA’s Web site at www.ncoa.org.
## NCOA Consolidated Statement of Changes in Unrestricted Net Assets

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<th>2008</th>
<th>2007</th>
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<tr>
<td><strong>Revenue and other support:</strong></td>
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<td>Government grants and contracts</td>
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<td><strong>Net Operating (Unrestricted) Results</strong></td>
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<td><strong>Other Comprehensive Income (Loss)</strong></td>
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<td>Unrestricted Net Assets at End of Year</td>
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See a complete set of audited financial statements with accompanying footnotes and disclosures at NCOA’s Web site, [www.ncoa.org](http://www.ncoa.org).
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U.S. Centers for Medicare & Medicaid Services
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Washington State Department of Social & Health Services
Other Supporting Partners

Easter Seals
Generations United
George Washington University
Home Safety Council
Mathematica
Money Management International
National Assembly
National Association of Area Agencies on Aging
National Governors Association
P.A.D. Coalition
Temple University
Volunteer Impact Fund, spearheaded by
  The UPS Foundation
VolunteerMatch

Corporations

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CogniFit
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