

# & For With

2023  
ANNUAL  
REPORT





**“I called and  
got Erika,  
and everything  
just got better.”**

Kepina Hasegawa received more benefits for healthy food thanks to Erika Murdoch of Sacramento Food Bank & Family Services, an AARP Foundation grantee.



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OUR MISSION

AARP Foundation creates  
and advances effective  
solutions to reduce poverty  
*for & with* older adults.

How  
&

# In 2023, we worked *for & with*

**1,043,254**

older adults with low income



Up 10%  
from 2022

**2,151,600**

caring and  
generous donors



**27,465**

passionate and  
dedicated volunteers



**7,758**

committed  
community partners



**3,256**

children becoming  
better readers



Together, our programs secured

**\$913,288,052**

in income, earnings,  
benefits and tax refunds



Up 25%  
from 2022





# Letter from the President

## Dear Friends,

Reflecting on my first year as president of AARP Foundation, I am filled with gratitude to have had the privilege to join an organization with such a profound commitment to service and the expertise and resources to make meaningful change. In 2023, we created new pathways to financial wellbeing and economic mobility for more than 1 million older adults with low income.

We also took a hard look at how we can do *more*. We asked ourselves, how can we build on our strengths to serve more people and have a greater impact in their lives? And we realized that one of our greatest strengths is *all of you*. Our partners.

Our volunteers who fight poverty in their communities. Our donors who invest in a shared vision of a future where no older person feels vulnerable. The older adults who seek out AARP Foundation programs and resources to meet their basic needs and work for a better tomorrow. And the courageous people who put their personal interests aside to join years-long lawsuits to advocate for a fair living wage for home care aides or a hiring process free from age discrimination.

By coming together and focusing our collective commitment and energy, our ability to increase our impact and achieve our vision becomes possible.

As we thought about who we are and where we are going, we organized the Foundation to build new capabilities and take advantage of what we do best. And we updated our mission statement to reflect our true purpose and strength: “AARP Foundation creates and advances effective solutions to reduce poverty **for & with** older adults.”

AARP Foundation works to reduce poverty. But not just **for** older adults. **With** older adults. And our collective success, our very identity, is based on and because of those efforts.

**This annual report shows how our successes this year were achieved through partnership. **Together**, we are building the foundation for a brighter future without poverty where all older adults can live with purpose and dignity.**

With gratitude,

**Claire Casey**  
*President, AARP Foundation*



# 01

# Stronger With Volunteers

At AARP Foundation, volunteers are a driving force of our success. In 2023, more than 27,000 older adults came together to operate the nation's largest free tax preparation service and to help children in underserved communities become better readers. Their commitment, skills and motivation helped us dramatically expand our reach and impact.

That's why we decided to double down on this superpower by bringing our two flagship volunteer programs together into one team.

By collaborating more closely, our programs can learn from each other, including new ways to recruit volunteers, provide them with the best experiences, and bring them back year after year.

We are already one of the largest older adult volunteer organizations in the country. As we continue to grow, we can share successful strategies with other volunteer-powered organizations, helping them grow, too.



**“There is so much potential in partnering with older adult volunteers. They bring knowledge, time, passion and energy, and they see the importance of investing in their communities.”**

*Mioshi Moses*  
VP, Volunteer Programs

# 1.1

## AARP Foundation Tax-Aide

Tax-Aide is the nation's leading free tax preparation service, operating in every state. Each year in February, volunteers set up folding tables in library basements and civic centers in more than 3,500 communities. And during the 10-week peak tax season, our IRS-certified tax preparers meet with taxpayers from morning till night, helping them to navigate the tax code and maximize their returns.

Tax refunds are an important source of financial support for tax filers struggling with low income, sometimes representing one of the largest payments they receive all year. This additional income can be used to build savings, pay down debt, make home or car repairs or large household purchases.<sup>1</sup>

### TAX-AIDE IN 2023

Tax-Aide and our grantees secured

# \$563,947,534

in tax refunds and credits for

# 918,774

older adults with low income.

**With an average  
tax refund of \$905,**



**we helped taxpayers secure critical  
funds to help meet their daily expenses.**

The average refund of \$905 is more than enough to cover the average cost of **a year of cell phone service** for an older adult with low income.<sup>2</sup>



**“We have people who  
burst into tears when  
they find that they get  
a refund.”**

*Janelle Riedl  
Tax-Aide volunteer*

TAX-AIDE

## Chuck Raeder

*Volunteer*

When Chuck sold his construction company in 2012, he started volunteering for Tax-Aide. He enjoyed helping people so much, he kept coming back and taking on more responsibilities until he eventually became chair of the national committee that oversees training for more than 27,000 volunteers. He has made countless meaningful connections and built enduring friendships through his time volunteering.

“For whatever  
you put in,  
you get so much  
more out.”

For  
& With



EXPERIENCE CORPS

## Calvin Leonard

*Volunteer*

In 2023, AARP Foundation had the honor of bringing Calvin Leonard to Washington, D.C., to receive the President's Volunteer Service Lifetime Achievement Award for contributing more than 4,400 hours of service over 20 years. Calvin joined Experience Corps after he retired from a career in manufacturing and has since helped an entire generation of children become stronger readers. His dedication has helped them build the solid foundation they need to succeed later in school and in life.

**“You’ll be working with a child, and all of a sudden, you can see in their face that they got it. It just makes you feel good.”**



# 1.2

## AARP Foundation Experience Corps

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Nearly 30 years ago, Experience Corps was cofounded by a geriatrician after she started writing prescriptions for her older patients to go volunteer. To Dr. Linda Fried, the health benefits of sustained connection and purpose gained through a meaningful volunteer commitment were clear.

Today this national intergenerational literacy program, administered by AARP Foundation, brings meaning and connection to older adult volunteers while fulfilling a vital mission for children and schools in underserved communities.

The ability to read at grade level by the end of third grade is an important predictor of future success in education, career and life. Experience Corps volunteers work with elementary students to strengthen their literacy skills so they can meet this critical milestone.

**In 2023, we partnered with 155 schools and afterschool programs in 18 cities and regions. The Mesa, Arizona, school system came on as a new partner, inspired by our success in neighboring Tempe.**

**3,256**  
children served

---

**1,302**  
volunteers



# 02

## Preparing the Future Workforce

Over the next decade, more than a third of the labor force in the United States will be over 50.

Older adults are the workforce of the future — and at AARP Foundation, we prepare them to overcome age discrimination and compete for good jobs in rapidly changing workplaces.

In 2023, we served 45,463 older adults with low income through AARP Foundation Senior Community Service Employment Program (SCSEP), BACK TO WORK 50+ and other programs.

Participants found jobs faster and at higher wages, taking advantage of the tight labor market. In addition, we dramatically expanded digital skills training for older adults with low income to help them navigate essential workplace technologies.

**45,463**

older adults with low income served in 2023



**Up 35% from 2022**



## 2.1

# BACK TO WORK 50+

BACK TO WORK 50+ provides older adults with free resources and career coaching so they can compete for high-quality jobs.

Only about half of people are steadily employed through their 50s. Many leave the workforce due to layoffs, personal health issues or caregiving responsibilities.<sup>3</sup>

BACK TO WORK 50+ offers a step-by-step process for securing a new job. Jobseekers nationwide have access to free virtual coaching, and in-person coaching is offered through partnerships with 12 community colleges and nonprofits in eight states.

**12,662 older adults with low income accessed our resources or attended a workshop in 2023 to learn proven strategies for finding employment. Nearly 1,700 of those jobseekers went on to receive career coaching virtually or in person, an increase of 37% from 2022.**

Following the program, those who secured jobs reported average wages of \$23 an hour, up nearly 10% from 2022.

BACK TO WORK 50+ generated

# \$18,036,398

in income in 2023



## 2.2

# AARP Foundation SCSEP

The Senior Community Service Employment Program (SCSEP) matches unemployed older adults with training opportunities at local nonprofits and public agencies. Through this model, jobseekers can build their résumés and self-confidence while earning income and serving their communities. AARP Foundation has administered this U.S. Department of Labor-funded program for more than 50 years, becoming a national leader in creating pathways for older adults to return to work.

**In 2023, our program participants graduated *three months faster*, reducing the average program duration from 21 months to 18, and they secured jobs earning *25% more*, with their hourly wage for post-SCSEP employment growing to an average of \$13.40.**

### SCSEP IN 2023

SCSEP served

# 11,527

older adults with low income

↑ **Up 6% from 2022**

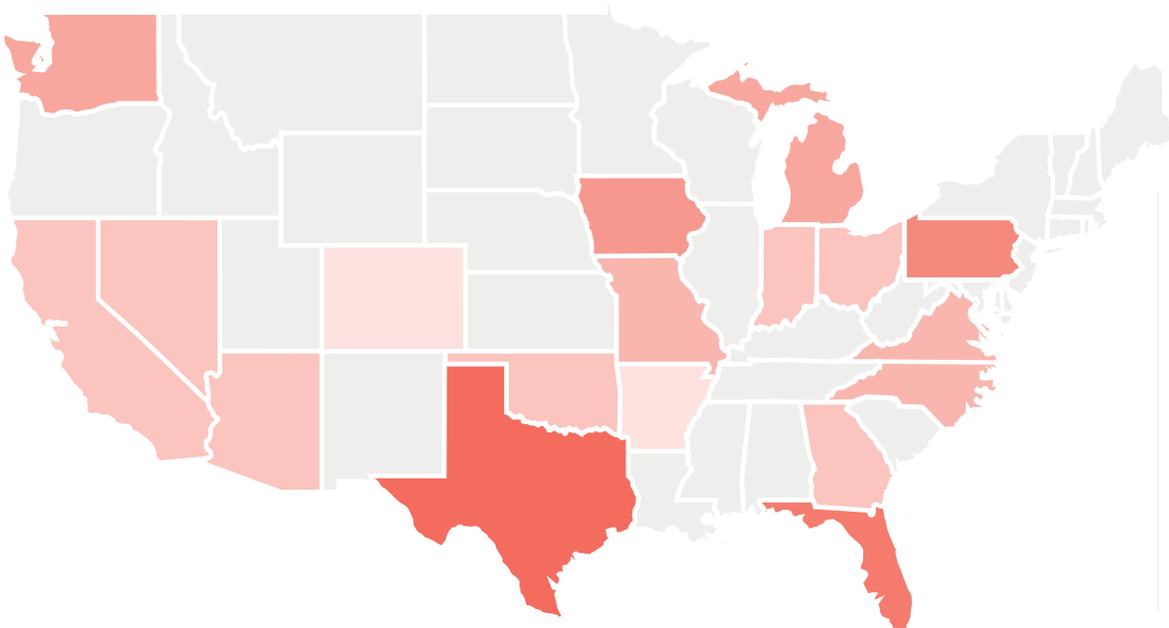


SCSEP generated

# \$96,268,570

in new income

↑ **Up 9% from 2022**



# 105

offices in

# 18

states and  
Puerto Rico with

# 3,705

host agencies

## Joyce Lindberg

*Participant*

An injured knee abruptly ended Joyce Lindberg's three-decade career in the restaurant business. Then chronic pain led to long-term unemployment. As her health eventually improved, she wanted to go back to work and applied to SCSEP to help her rebuild her résumé. Her internship led to a full-time job working at a government agency in aging services. She advises older adults about healthcare insurance and helps them with other challenges. "My job now is to help people," she says. That includes referring others to the program that helped her get back to work. "SCSEP can really make a difference in your life."

**"My job now is to help people. SCSEP can really make a difference in your life."**



For  
& with

## Deborah Lofton

*Participant*

Deborah Lofton, a registered nurse, retired earlier than planned only to realize she could not keep up with her expenses. Her job search led her next to AARP Foundation's Work for Yourself@50+, where she learned valuable skills for starting her own business, including how to market herself to potential clients and use social media to advertise. Since then, she started a consulting business, helping patients stay on track with their health goals, as well as a nonprofit organization that provides incontinence supplies to people with low income. Working part-time she brings in steady income and enjoys the challenges of running her own business.

**“I’ve always had an entrepreneur’s spirit. Retiring wasn’t the end. It was a new beginning for me.”**

For  
& with

## 2.3

# Work for Yourself@50+

Not everyone wants a 9 to 5. The flexibility and independence of working for yourself appeals to many older adults, whether that means becoming an entrepreneur or testing out a side hustle in the gig economy. AARP Foundation offers online workshops and a free toolkit to help people who want to increase their financial stability by starting a business or becoming an independent contractor.

**In 2023, we significantly increased the number of older adults who accessed our free resources or workshops.**

Work for Yourself@50+ served

**16,811**  **48% more than 2022**

older adults with low income

Participants reported

**\$946,456**  **More than 2X our goal**

in new revenue



## 2.4

# Digital Skills Ready@50+™ Initiative

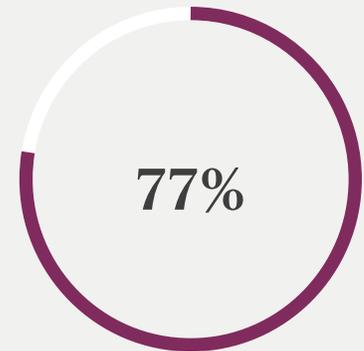
Digital skills are essential in today's workplaces. But nearly one in three workers lack the basic competencies they need. That's why AARP Foundation created free virtual and in-person training to cover the digital essentials people need to find a job or change careers. The initiative was funded by Google.org and administered in partnership with Older Adults Technology Services (OATS) from AARP.

We started the initiative in 2022 with an ambitious goal to reach more than 25,000 older adults. In 2023 we blew past that goal, serving 26,112 people in eight states. That total includes 14,243 older adults with low income, mostly women and people of color.

AARP Foundation collaborated with 125 local and regional partners, offering training in skills such as video conferencing, office productivity software, and an introduction to information security.

**According to the National Skills Coalition, workers who qualify for jobs that require even one digital skill can earn an average of 23% more than in a job requiring none. What's more, moving from a job requiring no digital skills to a job requiring at least three can increase pay by an average of 45%.**

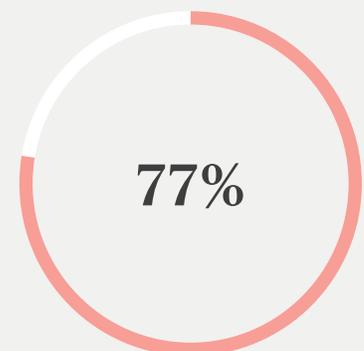
Among participants surveyed:



said their **digital skills improved.**



said they planned to **use certain skills they had learned** in the next few days.



stated they were very likely to **take another digital skills class.**

## Deidre Champion

*Participant*

Deidre signed up for the Digital Skills Ready@50+ initiative after a long year of unsuccessful job searching. “It’s hard to stay motivated after you get 20 or 30 rejections,” she says. Brushing up on her technology skills made a difference, though. Deidre was offered a full-time position as an office administrator for a health care association after she finished her training — with a salary that was thousands more than she had earned in her last job. With her new job and better pay, Deidre, who’d been living with friends and family, was recently able to move into her own place and, she says, “exhale for the first time in years.”

“It’s hard to stay motivated after you get 20 or 30 rejections.”

For  
& with





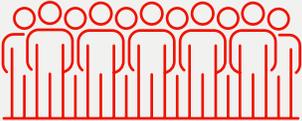
# 03

## Fostering Financial Wellbeing

In 2023, as rising household expenses increased the need for safety net programs, we expanded the number of older adults we served and the way we served them.

We funded community-based organizations to help older adults apply for public benefits, assisting 79,017 older adults with low income, a 24% increase from 2022. And we dramatically increased the level of service we provided by funding organizations to assist with multiple benefits applications, generating \$206,553,374 in income from benefits, an increase of 66% from 2022.

Our goal is to support older adults with low income more holistically. In 2023, we expanded the scope of our benefits program in other ways to explore different opportunities to promote **financial wellbeing**. That meant investing in solutions to reduce expenses for older adults, including property tax relief and student loan assistance, as well as looking upstream to invest in research to reduce barriers that prevent older adults from accessing benefits in the first place.

**79,017** 

older adults with low income served in 2023

 **Up 24%** from 2022

**\$206,553,374**

gained in income from benefits

 **Up 64%** from 2022



# 3.1

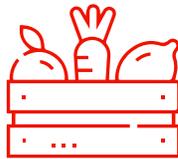
## Expanding benefits access

The systems older adults face when they apply for benefits are incredibly complicated. We are working to simplify them. Many older adults who are eligible for SNAP also qualify for other public benefits. All these supports together can provide greater financial stability and better outcomes for older adults with low income. So why not make it easier to apply in one place?

In 2023, in addition to funding 19 community-based organizations to assist with applications for SNAP, Medicare Savings Programs or Medicaid, we expanded our investment in four of those organizations that were capable of managing multiple applications. That way each person walking through the door could connect to multiple sources of support.

**For an older adult who applied for SNAP and also received help with a Medicaid application, the average financial value of their benefits *increased from \$153 to \$1,512 per month.***

**This additional support meant not just money for nutritious food but the peace of mind to visit the doctor and pay for prescriptions without fear of going into debt.**



We helped

# 52,357

older adults with low income secure

# \$105,285,378

in SNAP benefits.

We helped

# 10,704

older adults with low income access

# \$73,042,998

in health care benefits by helping them enroll in Medicaid, Medicare Savings Programs, and the Part D Low-Income Subsidy program.

**Medicare Savings Programs** help cover premiums and other out-of-pocket costs for people with low income and put money back in their Social Security check every month. **The Low-Income Subsidy** pays for Medicare Part D and ensures participants can afford the medications they need to manage their health.

## SNAP ENROLLMENT ASSISTANCE

### Tom McSpedden

*Benefit Recipient*

After a series of heart attacks, Tom McSpedden was overwhelmed by medical debt and no longer able to work as a truck driver. He relied on public benefits, including CalFresh, California's Supplemental Nutrition Assistance Program (SNAP), to help him get by. He often has struggled to afford enough food, particularly the nutritious, unprocessed foods he needs to manage his diabetes. In 2023, Erika Murdoch, a specialist at Sacramento Food Bank & Family Services, an AARP Foundation grantee, helped him report additional qualifying expenses on his application that added \$70 to his monthly benefit.

**“If you can find the right person to help you, someone who knows the system, you might be able to get more. Erika found a way to help me survive.”**

A portrait of Tom McSpedden, a middle-aged man with a full white beard and mustache, wearing a grey t-shirt. He is looking directly at the camera with a slight smile. The background is a solid blue color.

For  
& With

## 3.2

# Challenging barriers to financial security

Many older adults experiencing financial hardship don't apply for benefits. Nearly 11.8 million adults over 50 were food insecure in 2022, yet only 37% of those eligible for SNAP applied.

AARP Foundation conducted research to understand stigma and other barriers to enrolling in SNAP. And we drew upon behavior change research to develop marketing messages that would motivate people to apply.

The ads we developed proved successful in reducing stigma and increased the likelihood that older adults would apply. Now we are sharing these messages and insights with other organizations working to boost participation in other benefits programs.

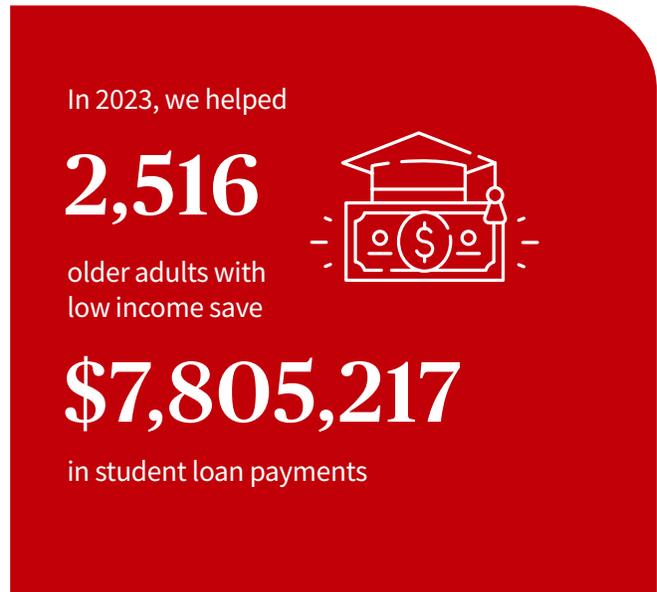


## 3.3

# Managing expenses

### Student Loan Relief

Nine million people over 50 are burdened by federal student loans. After a three-year pause, payments resumed in 2023. AARP Foundation raised awareness about opportunities to lower payments for people with low income and supported older borrowers through the enrollment process.



### Easing Housing Costs

Rising property taxes strain budgets for many older homeowners. Residential property tax refund and credit programs are available in nearly every state and the District of Columbia. We helped eligible older adults apply for property tax relief in select states. And we began building a digital resource center to provide information about all the different state and local programs in one place to make it easier for older adults to find and apply for a program in their area. This online resource will help even more people going forward.



# 04

## Confronting Systemic Injustice

AARP Foundation attorneys litigate at the intersection of aging and social justice. Our public interest legal division advocates for systemic change to advance the rights and interests of older adults, particularly those with low income.

In 2023, we challenged wage theft on behalf of a class of home health aides in Maryland, shining a light on the widespread underpayment of workers comprising one of the nation’s fastest growing occupations. And we settled a precedent-setting

case in California against a nursing facility for illegally “dumping” residents returning from the hospital.

We also took on critical emerging legal questions by joining a class action case against Meta that shows how its use of artificial intelligence is perpetuating age discrimination in hiring. And we fought to protect a key legislative victory that gives Medicare the right to negotiate the price of pharmaceutical drugs, lowering prices for the older adults who need them.

**The ruling in Gloria’s case established a strong precedent to protect other nursing facility residents from being**



## 4.1

# Taking on age discrimination in hiring

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In 2023, AARP Foundation joined a pending class action lawsuit against Meta, charging that the technology the company uses to decide where job advertisements appear on Facebook discriminates against women and older jobseekers.

REAL Women in Trucking, a group representing female truck drivers, filed the charge with the U.S. Equal Employment Opportunity Commission (EEOC)

in December 2022, claiming that the technology steered certain job ads away from women and older people. By intentionally excluding older workers from seeing job advertisements based on “ageist assumptions,” Meta’s algorithm is “further fortifying the already significant barriers” older adults face in the job market, AARP Foundation lawyers wrote in our filing with the EEOC.

## 4.2

# A decisive win against illegal “resident dumping”

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The Superior Court of the State of California issued a final order affirming that it is illegal for a skilled nursing facility to refuse admission to a resident returning from the hospital. The ruling settled a case brought in 2017 by Gloria Single against Retirement Housing Foundation and its nursing facility Cathedral Pioneer Church Homes II (Pioneer House), after it refused to readmit her following a temporary hospitalization.

As a result, Gloria lived in a hospital for months while her son searched for a new nursing facility. During that time, she was separated from her husband of 30 years, who had remained at Pioneer House. She lost much of her cognitive and physical abilities. Her husband died before she was able to see him again, and she passed away less than a year later. This ruling established a strong precedent to protect nursing homes residents from being unlawfully evicted.

## Margaret Bobb

*Plaintiff*

As a home health aide, Margaret Bobb is committed to making it possible for her older clients to live safely at home. “It makes me feel good to take care of people who cannot take care of themselves,” she said. In her job with a Maryland home health agency, she often traveled long distances between clients’ homes and worked long hours — even assisting clients on Christmas morning — but was never paid for travel or overtime. After her hourly pay was cut without notification, she got in touch with a law firm and then AARP Foundation attorneys. Now she is the lead plaintiff in a class action lawsuit suing her former employer for wage theft. She is speaking out to improve working conditions for her profession — and for those who rely on it.

“We can’t provide the kind of care people need if we’re not paid what the law says we’re owed.”

For  
& With

## 4.3

# Challenging wage theft from home care workers

AARP Foundation filed a class action lawsuit against a Maryland home health agency for underpaying its workers. The suit was filed on behalf of 50-year-old Baltimore resident Margaret Bobb and other home health aides working for FinePoints Private Duty Healthcare LLC.

Margaret and other home health aides routinely worked substantially more than 40 hours a week without being paid benefits or overtime in their role helping older adults and people with disabilities bathe, dress, prepare meals and clean for them. The agency also failed to pay them for long hours traveling between clients' homes.

“Refusing home care workers — many of whom are older and living on low incomes — the earnings they’ve worked hard for is an outright violation of the law,” William Alvarado Rivera, senior vice president for litigation at AARP Foundation, said in a statement. “By ensuring they receive the livable wages they deserve, we can help address the country’s shortage of direct care workers and improve the quality of care provided to those in need, often older adults with disabilities.”



**“We are fighting to ensure home care workers receive the wages they deserve.”**

*William Alvarado Rivera*  
SVP, Litigation

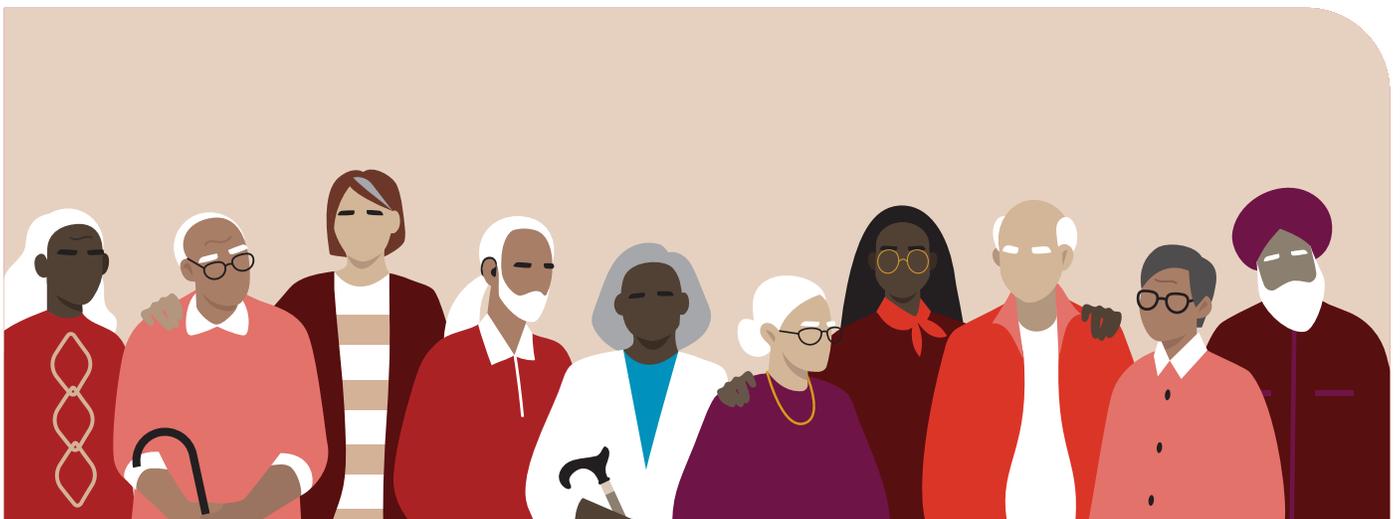
# 05

## For & With Our Donors

Thanks to our community of 2,151,600 donors, AARP Foundation grew our impact in 2023. We were able to create new opportunities for connection and purpose for our increasing network of older adult volunteers, who in turn brought financial relief to taxpayers with low income and tutored children

in underserved communities. We created more pathways for older jobseekers to return to work by expanding digital skills training and online coaching. And we invested in innovative solutions to reduce expenses for older adults with low income and significantly expand their access to public benefits.

**Whether a first-time donor or someone who has contributed over many years, each of our donors multiplied our impact and our hope for a better future where no older person feels vulnerable.**



PHILANTHROPY

## Peggy Wild

*Donor*

When Peggy Wild retired in 2017, she signed up to be a Tax-Aide volunteer in her Indianapolis neighborhood. The experience gave her a new perspective on how many older adults in her community are struggling. Peggy had donated to the Foundation in small amounts since becoming a member of AARP. As she learned more about the Foundation's work to fight food insecurity, she was inspired to donate more. As Peggy said, what started as a volunteer opportunity has led to a growing awareness about senior poverty and how she can make a difference by contributing to AARP Foundation.

“Every day, I see the importance of the work we do and the work that still needs to be done.”

For  
& with



# Corporate and Institutional Supporters

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Thank you for believing in AARP Foundation's mission and our work to end senior poverty. Your generous support is helping to ensure that vulnerable older adults can secure the essentials.

AmeriCorps

Arizona Department of Economic Security

Barclays Bank Delaware

Commonwealth Fund

Easterseals

Florida Department of Elder Affairs

General Motors

Google.org

The Hartford

Internal Revenue Service

Iowa Department of Administrative Services

John A. Hartford Foundation

Maine Health Access Foundation

Missouri State Government

The Mousetrap Foundation

National Caucus and Center on Black Aging, Inc.

NEW Solutions

North Carolina Division of Aging and Adult Services

Oklahoma State Government

Pennsylvania Department of Aging

Ralph C. Wilson, Jr. Foundation

Robert Wood Johnson Foundation

Rust Consulting, Inc.

SCAN Foundation

State of Washington

Texas Workforce Commission

Tides Foundation

UnitedHealthcare, Inc.

United States Department of Justice

United States Department of Labor

# Opportunity Builders

The AARP Foundation Opportunity Builders are generous and committed leaders who sustain our vision and our mission. These donors power the work we do with their annual gifts of \$1,000 or more. Their philanthropic gifts allow us to serve as a force for change on the most serious issues faced by vulnerable seniors living in poverty. We thank the following individuals for their generosity and support of AARP Foundation.

## VISIONARIES (\$25,000+)

Kristine Fulmer  
Edward Kent  
William Malone  
Donald G. Smith, Jr.  
William Vukowich  
Debra Whitman, PhD

## GUARDIANS (\$15,000-\$24,999)

Kristine Harris  
Jeanne Hoch  
Estella O'Connor  
John Rakoske  
Libby Sartain  
Anonymous  
Jackie & Glenn Tilton  
Alphonso Varner

## CHAMPIONS (\$10,000-\$14,999)

Anonymous (1)  
Elaine Boltz  
Stuart Christenfeld  
Steve Denari  
Cathy Disch  
William Goings  
Ralph Haines  
Bob & Sian Harris  
Kevin Hui  
Lloyd E. & Juanita Johnson  
Paul Marischen  
Diane D. Miller  
Nancy Mitchell  
Christine Splichal  
Linden Welch  
Patricia Wild

## LEADERS (\$5,000-\$9,999)

Anonymous (3)  
Anne Aoki  
Peggy Beckman  
Bob Blancato  
Scott Boxer  
Joan Budden  
Elaine Burke  
Anthony J. Burnell  
Arthus Christian  
Joseph & Emily Coughlin  
Ann Daw  
Gregory Dyson  
Penney Farris  
Burton Field  
Bob Fox & Andrea Mintz  
Mary Frahm  
Thomas Fusco  
Judyth Gaddie  
Noreen Gillen  
Franklin & Jenny Guerrero  
Betty Hudson  
John E. Jacob  
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The names listed below are those AARP Foundation Legacy Society members who have confirmed both their gift commitments and their willingness to have their names published. On behalf of the people we serve, AARP Foundation offers them our heartfelt thanks.

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As of August 2024

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Alexander van Kemenade, Senior Vice President of Impact Analytics

# Financials

This summary of financial information has been extracted from the AARP Foundation audited financial statements for the years ending December 31, 2023, and December 31, 2022, and on which an independent public accounting firm expressed an unmodified opinion.

## SOURCES AND USES OF FUNDS

AARP Foundation receives funding from multiple sources, including public support, grants and AARP. Seventy-nine cents of every dollar the Foundation spends goes to our important programs and services to improve the quality of life for vulnerable older adults in your community and across the country.

### REVENUE BY CATEGORY



### FUNCTIONAL EXPENSES



**STATEMENTS OF FINANCIAL POSITION** | As of December 31, 2023, and December 31, 2022 (in thousands)

<b>ASSETS</b>	<b>2023</b>	<b>2022</b>
Cash and cash equivalents	10,098	9,563
Contributions receivable, net	1,345	413
Grants receivable	12,040	12,810
Prepaid expenses and other assets	972	1,258
Investments	650,652	618,527
Charitable gift annuity investments	5,476	4,805
Program-related investments, net	3,500	4,825
Property and equipment, net	9,196	10,452
<b>Total Assets</b>	<b>693,279</b>	<b>662,653</b>

<b>LIABILITIES</b>	<b>2023</b>	<b>2022</b>
Accounts payable and accrued expenses	25,593	25,987
Due to affiliates	4,196	6,062
Charitable gift annuities payable	2,897	3,185
Bonds payable	25,000	25,000
<b>Total Liabilities</b>	<b>57,686</b>	<b>60,234</b>

<b>NET ASSETS</b>	<b>2023</b>	<b>2022</b>
<b>Net assets without donor restrictions:</b>		
Undesignated	65,705	57,135
Board-designated quasi-endowment	29,434	27,570
Board-designated operating reserves	64,460	62,407
<b>Total net assets without donor restrictions:</b>	<b>159,599</b>	<b>147,112</b>
<b>Net assets with donor restrictions</b>	<b>475,994</b>	<b>455,307</b>
<b>Total Net Assets</b>	<b>635,593</b>	<b>602,419</b>
<b>Total Liabilities and Net Assets</b>	<b>693,279</b>	<b>662,653</b>

**STATEMENTS OF ACTIVITIES** | For the years ended December 31, 2023, and December 31, 2022 (in thousands)

<b>OPERATING REVENUE</b>	<b>2023</b>	<b>2022</b>
Grant revenue	102,136	108,172
Contributions	57,800	61,710
In-kind contributions	62,689	54,346
Investment income designated for operations	28,941	25,835
Other	841	6,840
<b>Total Operating Revenue</b>	<b>252,407</b>	<b>256,903</b>

<b>EXPENSES</b>	<b>2023</b>	<b>2022</b>
<b>Program Services:</b>		
Workforce Programs	132,325	124,700
Tax and Credits Programs	20,047	20,103
Experience Corps	6,878	9,749
Other Programs	28,423	31,798
Legal Advocacy	7,371	6,363
<b>Total Program Services</b>	<b>195,044</b>	<b>192,713</b>
<b>Supporting Services:</b>		
Fundraising	30,552	27,479
Management and general	25,743	23,868
<b>Total Supporting Services</b>	<b>56,295</b>	<b>51,347</b>
<b>Total Expenses</b>	<b>251,339</b>	<b>244,060</b>
<b>Changes in Net Assets from Operations</b>	<b>1,068</b>	<b>12,843</b>

<b>OTHER CHANGES IN NET ASSETS</b>	<b>2023</b>	<b>2022</b>
Investments (loss) return in excess of amounts designated for operations	32,082	(58,264)
Changes in value of charitable gift annuities	24	(226)
Change in Net Assets	33,174	(45,647)
Net Assets, Beginning of Year	602,419	648,066
<b>Net Assets, End of Year</b>	<b>635,593</b>	<b>602,419</b>

# Citations

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<sup>1</sup> Mendenhall, R., Edin, K., Crowley, S., Sykes, J., Tach, L., Kriz, K., & Kling, J. R. (2012). The role of earned Income tax credit in the budgets of Low-Income households. *Social Service Review*, 86(3), 367–400. <https://doi.org/10.1086/667972>.

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<sup>2</sup> Bureau of Labor Statistics, & U.S. Census Bureau (2023). Consumer Expenditure Survey (CES) Public Use Microdata Sample (PUMS), 2022 [Data set]. Bureau of Labor Statistics. Retrieved September 26, 2023, from <https://www.bls.gov/cex/pumd.htm>.

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<sup>3</sup> Truesdale, B. C., Berkman, L. F., & Mitukiewicz, A. (2022). When I'm 54: Working Longer Starts Younger Than We Think. In *Overtime: America's Aging Workforce and the Future of Working Longer* (pp. 27–48). Oxford University Press New York. <https://doi.org/10.1093/oso/9780197512067.003.0002>.

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Thank you for believing  
in our shared vision.

*Together*, we're building a future  
without senior poverty.

HOPE  
& FUTURE

# About AARP Foundation

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AARP Foundation works for and with vulnerable people over 50 to end senior poverty and reduce financial hardship by building economic opportunity. As a charitable affiliate of AARP, we serve AARP members and nonmembers alike. Through vigorous legal advocacy and evidence-based solutions, and by strengthening supportive community connections, we foster resilience, advance equity and restore hope.