Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust Treated as a Private Foundation

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements.

OMB No 1545-0052

2009

For calendar year 2009, or tax year beginning , and ending

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

Use the IRS label Otherwise, print or type See Specific Instructions.

Name of foundation: Retirement Research Foundation

A Employer identification number: 36-2429540

Number and street (or P O box number if mail is not delivered to street address): 8765 West Higgins Road — Room/suite: 430

B Telephone number: (773)714-8080

City or town, state, and ZIP code: Chicago, IL 60631-4170

C If exemption application is pending, check here ▶☐

D 1. Foreign organizations, check here ▶☐

2. Foreign organizations meeting the 85% test check here and attach computation ▶☐

H Check type of organization: ☒ Section 501(c)(3) exempt private foundation

☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶☐

I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶$ 113,959,246.

J Accounting method: ☐ Cash ☒ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶☐

Part I **Analysis of Revenue and Expenses** (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received			N/A	
	2 Check ▶ ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	50,933.	50,933.		Statement 1
	4 Dividends and interest from securities	3,158,075.	3,158,075.		Statement 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	<50610817.>			
	b Gross sales price for all assets on line 6a 193686880.				
	7 Capital gain net income (from Part IV line 2)		0.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss)				
	11 Other income	137,718.	0.		Statement 3
	12 **Total** Add lines 1 through 11	<47264091.>	3,209,008.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	356,184.	57,837.		298,347.
	14 Other employee salaries and wages	547,380.	11,409.		535,971.
	15 Pension plans, employee benefits	273,473.	11,474.		261,999.
	16a Legal fees Stmt 4	8,876.	0.		8,876.
	b Accounting fees Stmt 5	54,565.	47,765.		6,800.
	c Other professional fees Stmt 6	1,879,230.	1,736,417.		142,813.
	17 Interest	645,235.	645,235.		0.
	18 Taxes Stmt 7	186,163.	30,163.		0.
	19 Depreciation and depletion	22,836.	2,284.		
	20 Occupancy	139,684.	13,968.		125,716.
	21 Travel, conferences, and meetings	37,998.	778.		37,220.
	22 Printing and publications	1,936.	194.		1,743.
	23 Other expenses Stmt 8	71,235.	2,379.		68,856.
	24 **Total operating and administrative expenses.** Add lines 13 through 23	4,224,795.	2,559,903.		1,488,341.
	25 Contributions, gifts, grants paid	2,398,520.			6,898,559.
	26 **Total expenses and disbursements** Add lines 24 and 25	6,623,315.	2,559,903.		8,386,900.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	<53887406.>			
	b **Net investment income** (if negative, enter -0-)		649,105.		
	c **Adjusted net income** (if negative, enter -0-)			N/A	

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Part II Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets 1	Cash - non-interest-bearing			
2	Savings and temporary cash investments	50,706.	177,998.	177,998.
3	Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
4	Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
5	Grants receivable			
6	Receivables due from officers, directors, trustees, and other disqualified persons			
7	Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
8	Inventories for sale or use			
9	Prepaid expenses and deferred charges	17,495.	62,646.	62,646.
10a	Investments - U.S. and state government obligations Stmt 9	11,469,661.	4,300,892.	4,300,892.
b	Investments - corporate stock Stmt 10	60,825,827.	10,035,414.	10,035,414.
c	Investments - corporate bonds Stmt 11	20,218,458.	0.	0.
11	Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
12	Investments - mortgage loans			
13	Investments - other Stmt 12	18,970,240.	99,358,980.	99,358,980.
14	Land, buildings, and equipment: basis ▶ 217,745.			
	Less accumulated depreciation Stmt 13▶ 194,429.	46,152.	23,316.	23,316.
15	Other assets (describe ▶)			
16	**Total assets** (to be completed by all filers)	111,598,539.	113,959,246.	113,959,246.
Liabilities 17	Accounts payable and accrued expenses	62,567.	201,703.	
18	Grants payable	6,719,429.	2,219,390.	
19	Deferred revenue			
20	Loans from officers, directors, trustees, and other disqualified persons			
21	Mortgages and other notes payable			
22	Other liabilities (describe ▶)			
23	**Total liabilities** (add lines 17 through 22)	6,781,996.	2,421,093.	
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here** ▶ [X] **and complete lines 24 through 26 and lines 30 and 31.**			
24	Unrestricted	104,816,543.	111,538,153.	
25	Temporarily restricted			
26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ [ ] **and complete lines 27 through 31.**			
27	Capital stock, trust principal, or current funds			
28	Paid-in or capital surplus, or land, bldg., and equipment fund			
29	Retained earnings, accumulated income, endowment, or other funds			
30	**Total net assets or fund balances**	104,816,543.	111,538,153.	
31	**Total liabilities and net assets/fund balances**	111,598,539.	113,959,246.	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	104,816,543.
2	Enter amount from Part I, line 27a	2	<53,887,406.>
3	Other increases not included in line 2 (itemize) ▶ Unrealized Security Appreciation	3	60,609,016.
4	Add lines 1, 2, and 3	4	111,538,153.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	111,538,153.

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Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a				
b	See Attached Statement			
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a				
b				
c				
d				
e	193,686,880.	27,380.	244,325,077.	<50,610,817.>

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a				
b				
c				
d				
e				<50,610,817.>

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7; If (loss), enter -0- in Part I, line 7 } **2** <50,610,817.>

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8 **3** N/A

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	9,734,268.	145,634,248.	.066841
2007	10,607,232.	172,969,464.	.061324
2006	9,410,234.	165,256,781.	.056943
2005	8,836,547.	160,025,172.	.055220
2004	8,464,968.	156,287,310.	.054163

2 **Total** of line 1, column (d)	2	.294491
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.058898
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	105,671,344.
5 Multiply line 4 by line 3	5	6,223,831.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	6,491.
7 Add lines 5 and 6	7	6,230,322.
8 Enter qualifying distributions from Part XII, line 4	8	8,386,900.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here ▶ [ ] and enter "N/A" on line 1. Date of ruling or determination letter: ______ **(attach copy of letter if necessary-see instructions)**				
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ [X] and enter 1% of Part I, line 27b			1	6,491.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)				
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			2	0.
3 Add lines 1 and 2			3	6,491.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			4	0.
5 **Tax based on investment income** Subtract line 4 from line 3. If zero or less, enter -0-			5	6,491.
6 Credits/Payments:				
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	62,617.		
b Exempt foreign organizations - tax withheld at source	6b			
c Tax paid with application for extension of time to file (Form 8868)	6c			
d Backup withholding erroneously withheld	6d			
7 Total credits and payments. Add lines 6a through 6d			7	62,617.
8 Enter any **penalty** for underpayment of estimated tax. Check here [X] if Form 2220 is attached			8	
9 **Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	
10 **Overpayment** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	56,126.
11 Enter the amount of line 10 to be: **Credited to 2010 estimated tax** ▶		56,126. **Refunded** ▶	11	0.

Part VII-A Statements Regarding Activities

		Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? *If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities*	1b		X
c Did the foundation file **Form 1120-POL** for this year?	1c		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ $ 0. (2) On foundation managers. ▶ $ 0.			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0.			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities*	2		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		X
4a Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a	X	
b If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b	X	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T*	5		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7 Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV*	7	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ IL,MI			
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If "No," attach explanation*	8b	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

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Part VII-A Statements Regarding Activities *(continued)*

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ http://www.rrf.org

14 The books are in care of ▶ Irene Frye Telephone no. ▶ 773-714-8080

Located at ▶ 8765 W. Higgins Road, Suite 430, Chicago, IL ZIP+4 ▶ 60631

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** - Check here ▶ ☐

and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 N/A

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

				Yes	No
1a	During the year did the foundation (either directly or indirectly):				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☒ Yes ☐ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☒ Yes ☐ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?		1b		X
	Organizations relying on a current notice regarding disaster assistance check here	▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?		1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):				
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?	☐ Yes ☒ No			
	If "Yes," list the years ▶ _____, _____, _____, _____				
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see instructions)	N/A	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ _____, _____, _____, _____				
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2009 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009)*	N/A	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?		4b		X

Part VII-B | Statements Regarding Activities for Which Form 4720 May Be Required *(continued)*

5a During the year did the foundation pay or incur any amount to:			
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☒ No		
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☒ No		
(3) Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes ☒ No		
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?	☐ Yes ☒ No		
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☒ No		
b If any answer is "Yes" to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?	N/A	5b	
Organizations relying on a current notice regarding disaster assistance check here	▶ ☐		
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? N/A	☐ Yes ☐ No		
If "Yes," attach the statement required by Regulations section 53 4945-5(d)			
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b	X
If "Yes" to 6b, file Form 8870			
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☒ No		
b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A	7b	

Part VIII | Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Statement 14		356,184.	12,142.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

(a) Name and address of each employee paid more than $50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Nancy Zweibel PHD - c/o RRF 8765 W. Higgins #430, Chicago, IL 60631	Program Officer 40.00	140,301.	21,045.	0.
Julie Kaufman PHD - c/o RRF 8765 W. Higgins #430, Chicago, IL 60631	Program Officer 40.00	122,388.	18,358.	0.
Kathy Stanko - c/o RRF 8765 W. Higgins #430, Chicago, IL 60631	Office Mgr 40.00	67,852.	10,178.	0.
Sheila Zerwer - c/o RRF 8765 W. Higgins #430, Chicago, IL 60631	Exec Asst 40.00	57,044.	8,557.	0.
Mary O'Donnell - c/o RRF 8765 W. Higgins #430, Chicago, IL 60631	Program Officer 40.00	58,651.	0.	0.
Total number of other employees paid over $50,000			▶	1

Part VIII **Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** *(continued)*

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
Global Endowment Management 100 N Tryon St, Charlotte, NC 28202	Money Manager	1,589,775.
SEI P. O. Box 1098, Oaks, PA 194569907	Money Manager	125,733.
Naomi M Stanhouse 1847 N Howe Street, Chicago, IL 606145125	Program Consultant	95,381.
Varey & Vaccariello CPAs PC - 617 E Golf Rd #107, Arlington Heights, IL 60005	Accounting Services	51,800.

Total number of others receiving over $50,000 for professional services ▶ 0

Part IX-A **Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A	
2	
3	
4	

Part IX-B **Summary of Program-Related Investments**

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions. 3	
Total. Add lines 1 through 3 ▶	0.

Part X Minimum Investment Return (All domestic foundations must complete this part Foreign foundations, see instructions)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	105,233,661.
b	Average of monthly cash balances	1b	2,046,891.
c	Fair market value of all other assets	1c	
d	**Total** (add lines 1a, b, and c)	1d	107,280,552.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e: 0.		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	107,280,552.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	1,609,208.
5	**Net value of noncharitable-use assets** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	105,671,344.
6	**Minimum investment return** Enter 5% of line 5	6	5,283,567.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ▶ ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	5,283,567.
2a	Tax on investment income for 2009 from Part VI, line 5 — 2a: 6,491.		
b	Income tax for 2009. (This does not include the tax from Part VI) — 2b: 101,775.		
c	Add lines 2a and 2b	2c	108,266.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	5,175,301.
4	Recoveries of amounts treated as qualifying distributions	4	54,931.
5	Add lines 3 and 4	5	5,230,232.
6	Deduction from distributable amount (see instructions)	6	0.
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	5,230,232.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	8,386,900.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	8,386,900.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	6,491.
6	**Adjusted qualifying distributions** Subtract line 5 from line 4	6	8,380,409.

Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII **Undistributed Income** (see instructions)

		(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7					5,230,232.
2 Undistributed income, if any, as of the end of 2009					
a Enter amount for 2008 only				0.	
b Total for prior years: ____, ____, ____			0.		
3 Excess distributions carryover, if any, to 2009:					
a From 2004					
b From 2005					
c From 2006					
d From 2007	3,569,810.				
e From 2008	8,795,657.				
f **Total** of lines 3a through e		12,365,467.			
4 Qualifying distributions for 2009 from Part XII, line 4. ▶ $ 8,386,900.					
a Applied to 2008, but not more than line 2a				0.	
b Applied to undistributed income of prior years (Election required - see instructions)			0.		
c Treated as distributions out of corpus (Election required - see instructions)		0.			
d Applied to 2009 distributable amount					5,230,232.
e Remaining amount distributed out of corpus		3,156,668.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)		0.			0.
6 **Enter the net total of each column as indicated below:**					
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		15,522,135.			
b Prior years' undistributed income. Subtract line 4b from line 2b			0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed			0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions			0.		
e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instr.				0.	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010					0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)		0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7		0.			
9 **Excess distributions carryover to 2010** Subtract lines 7 and 8 from line 6a		15,522,135.			
10 Analysis of line 9:					
a Excess from 2005					
b Excess from 2006					
c Excess from 2007	3,569,810.				
d Excess from 2008	8,795,657.				
e Excess from 2009	3,156,668.				

Part XIV | Private Operating Foundations (see instructions and Part VII A, question 9) N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling ▶

b Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon. a "Assets" alternative test - enter: (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV | Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year-see the instructions.)

1 **Information Regarding Foundation Managers:**

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000). (See section 507(d)(2).)

None

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

None

2 **Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

Check here ▶ ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number of the person to whom applications should be addressed:

See Statement 15

b The form in which applications should be submitted and information and materials they should include:

c Any submission deadlines:

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient: Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
Grants to General Funding Interests See Attachment A	None	All are Pub Charity or Schools	See attachment A	6667304.
Matching Gifts Program See Attachment B	None	All are Pub Charity or Schools	See attachment B	231,255.
Total			▶ 3a	6898559.
b *Approved for future payment*				
Grants Payable to General Funding Interests See Attachment C	None	All are Pub Charity or Schools	See attachment C	2219390.
Total			▶ 3b	2219390.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	(b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	(d) Amount	(e) Related or exempt function income
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	50,933.	
4 Dividends and interest from securities			14	3,158,075.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	<50,624,817.>	14,000.
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a Returned Grants					54,931.
b UBTI	900000			330,980.	
c Ordinary and Other					
d Portfolio (Losses) from					
e K-1			18	<248,193.>	
12 Subtotal. Add columns (b), (d), and (e)		0.		<47,333,022.>	68,931.

13 Total. Add line 12, columns (b), (d), and (e) 13 <47,264,091.>

(See worksheet in line 13 instructions to verify calculations.)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).
11a	Unspent Grants Returned by Grantees

Part XVII **Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations**

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
		N/A	

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge

Signature of officer or trustee: Irene Ing | Date: 11/11/10 | Title: Executive Director

Paid Preparer's Use Only

Preparer's signature: Norman Warren | Date: 11/11/10 | Check if self-employed ☐ | Preparer's identifying number

Firm's name (or yours if self-employed), address, and ZIP code: Varey & Vaccariello CPAs PC, 617 East Golf Road, Suite 107, Arlington Heights, Illinois 60005 | EIN ▶ | Phone no. 847-228-6977

Form **6781**

Department of the Treasury
Internal Revenue Service

Gains and Losses From Section 1256 Contracts and Straddles

▶ Attach to your tax return.

OMB No 1545-0644

2009

Attachment Sequence No 82

Name(s) shown on tax return: **Retirement Research Foundation**

Identifying number: **36-2429540**

Check all applicable boxes (see instructions)

- A ☐ Mixed straddle election
- B ☐ Straddle-by-straddle identification election
- C ☐ Mixed straddle account election
- D ☐ Net section 1256 contracts loss election

Part I Section 1256 Contracts Marked to Market

	(a) Identification of account		(b) (Loss)	(c) Gain
1	From Form K-1 Glogal Endowment Fund II LP 26-1741307			1,651,135
2	Add the amounts on line 1 in columns (b) and (c)	2	( )	1,651,135
3	Net gain or (loss) Combine line 2, columns (b) and (c)	3		
4	Form 1099-B adjustments. See instructions and attach schedule	4		
5	Combine lines 3 and 4	5		1,651,135
	Note: *If line 5 shows a net gain, skip line 6 and enter the gain on line 7. Partnerships and S corporations, see instructions.*			
6	If you have a net section 1256 contracts loss and checked box D above, enter the amount of loss to be carried back. Enter the loss as a positive number	6		
7	Combine lines 5 and 6	7		1,651,135
8	**Short-term capital gain or (loss).** Multiply line 7 by 40% (.40) Enter here and include on the appropriate line of Schedule D (see instructions)	8		660,454
9	**Long-term capital gain or (loss).** Multiply line 7 by 60% (.60) Enter here and include on the appropriate line of Schedule D (see instructions)	9		990,681

Part II Gains and Losses From Straddles. Attach a separate schedule listing each straddle and its components.

Section A—Losses From Straddles

	(a) Description of property	(b) Date entered into or acquired	(c) Date closed out or sold	(d) Gross sales price	(e) Cost or other basis plus expense of sale	(f) Loss. If column (e) is more than (d), enter difference Otherwise, enter -0-	(g) Unrecognized gain on offsetting positions	(h) Recognized loss. If column (f) is more than (g), enter difference Otherwise, enter -0-
10								

11a	Enter the short-term portion of losses from line 10, column (h), here and include on the appropriate line of Schedule D (see instructions)	11a	( )
b	Enter the long-term portion of losses from line 10, column (h), here and include on the appropriate line of Schedule D (see instructions)	11b	( )

Section B—Gains From Straddles

	(a) Description of property	(b) Date entered into or acquired	(c) Date closed out or sold	(d) Gross sales price	(e) Cost or other basis plus expense of sale	(f) Gain. If column (d) is more than (e), enter difference Otherwise, enter -0-
12						

13a	Enter the short-term portion of gains from line 12, column (f), here and include on the appropriate line of Schedule D (see instructions)	13a	
b	Enter the long-term portion of gains from line 12, column (f), here and include on the appropriate line of Schedule D (see instructions)	13b	

Part III Unrecognized Gains From Positions Held on Last Day of Tax Year. Memo Entry Only (see instructions)

	(a) Description of property	(b) Date acquired	(c) Fair market value on last business day of tax year	(d) Cost or other basis as adjusted	(e) Unrecognized gain. If column (c) is more than (d), enter difference Otherwise, enter -0-
14					

Part IV Capital Gains and Losses for Tax o[redacted]estment Income

	(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	SEI Mutual Funds (See Attached Schedule)	P	Various	Various
b	Automobile	P	03/24/04	01/14/09
c	From Form K-1 Global Endowment Fund II LP	P	Various	Various
d	From Form 6781 Attached	P	Various	Various
e	From Form 6781 Attached	P	Various	Various
f	Litigation Proceeds From Sale of Stock	P	Various	Various
g				
h				
i				
j				
k				
l				
m				
n				
o				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	190,557,105.		244,297,697.	<53,740,592.>
b	14,000.	27,380.	27,380.	14,000.
c	1,353,798.			1,353,798.
d	660,454.			660,454.
e	990,681.			990,681.
f	110,842.			110,842.
g				
h				
i				
j				
k				
l				
m				
n				
o				

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a				<53,740,592.>
b				14,000.
c				1,353,798.
d				660,454.
e				990,681.
f				110,842.
g				
h				
i				
j				
k				
l				
m				
n				
o				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7; If (loss), enter "-0-" in Part I, line 7 }	2	<50,610,817.>
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8	3	N/A

923591
04-24-09

Global Endowment Fund II, LP
EIN 26-1741307

IRC SECTION 6038B REQUIREMENTS

The following information is being furnished to you for disclosure pursuant to Treasury Regulation Section 1 6038B-(c)

During 2009, Global Endowment Fund II, LP indirectly trasnferred property to one or more non-U S entities treated as corporations for U S tax purposes As a partner of Global Endowment Fund II, LP you are treated as having made indirect transfer(s) to these corporations proportionate to your ending capital percentage

Name & Address of Transferee	Tax ID	Country	Amount ($)	Date	CFC	Type of Property	Type of Non-recognition Transfer	Line 11-15b	Line 16	Line 17
Societe Fonciere Lyonnaise 151 Rue Saint Honore 75001 Paris France	FOREIGNUS	France	$ 427 823	1/28/2009	No	Cash	Section 351	No	Yes	No
Direcional Engenharia S A Rua Grao Para 466 Santa Efigenia CEP 30150 340 Belo Horizonte MG Brazil	FOREIGNUS	Brazil	$ 182 606	Various	No	Cash	Section 351	No	Yes	No
Brazilian Renewable Energy Co Ltd C/o Bienco Holdings S A A V Pedroso de Morais 1153 6 Andar Sao Paulo SP Brazil	FOREIGNUS	Brazil	$ 35 617	Various	No	Cash	Section 351	No	Yes	No
Omega Energia Renovavel S A Rua Rio Grande do Norte 694 CJ 301 CEP 30130-130 Belo Horizonte MG Brazil	FOREIGNUS	Brazil	$ 37 763	Various	No	Cash	Section 351	No	Yes	No
Columbia Asia Hospital Private Ltd	FOREIGNUS	India	$ 409 877	Various	Yes	Cash	Section 351	No	Yes	No
Hesme Ltd Maples Corporate Services Ltd PO Box 309 Ugland House Grand Cayman KY1-1104 Cayman Islands	FOREIGNUS	Cayman Islands	$ 116 476	Various	No	Cash	Section 351	No	Yes	No
Kivu Watt Ltd Plot 9714 Nyarutarama Kigali Rwanda	FOREIGNUS	Rwanda	$ 36 285	Various	No	Cash	Section 351	No	Yes	No
China Pacific Insurance Group Corp No 190 Yinchenog Middle Road Pudong New Area Shanghai 200120 China	FOREIGNUS	China	$ 40 935	12/17/2009	No	Cash	Section 351	No	Yes	No
Capitamalls Asia Ltd 39 Robinson Road #18-01 Robinson Point Singapore 068911	FOREIGNUS	Singapore	$ 40 157	11/17/2009	No	Cash	Section 351	No	Yes	No
Banco Santander Brasil SA/Brazil Rua Amador Bueno 474 4th Floor Sao Paulo SP 04752-005 Brazil	FOREIGNUS	Brazil	$ 148 787	10/7/2009	No	Cash	Section 351	No	Yes	No
Fivefire Ltd C/O India Management Services Ltd 7th Floor Happy World House Sir William Newton Street Port Louis Republic of Mauritius	98-0644858	Republic of Mauritius	$ 32 953	12/24/2009	No	Cash	Section 351	No	Yes	No
Catdoya Ltd C/O India Management Services Ltd 7th Floor Happy World House Sir William Newton Street Port Louis Republic of Mauritius	98-0643141	Republic of Mauritius	$ 30 298	12/24/2009	No	Cash	Section 351	No	Yes	No
D E Shaw RE (Bermuda) Ltd 44 Church Street West Hamilton HM 12 Bermuda	98-0578874	Bermuda	$ 50 775	Various	Yes	Cash	Section 351	No	Yes	No
Craft CLO 2009-2 Ltd C/O Deutsche Bank (Cayman) Ltd PO Box 1094 Boundary Hall Cricket Square 171 Elgin Avenue Grand Cayman KI1 1104 CJ	FOREIGNUS	Cayman Islands	$ 23 745	12/23/2009	No	Cash	Section 351	No	Yes	No
NS2 com Internet S A Rua Vergueiro 398 Liberdade Sao Paulo SP Brazil 01504-000	FOREIGNUS	Brazil	$ 60 092	Various	No	Cash	Section 351	No	Yes	No
Oalyper Investments Cayman Ltd Walker House 87 Mary Street George Town Grand Cayman Cayman Islands KY1 9005	FOREIGNUS	Cayman Islands	$ 197 283	Various	No	Cash	Section 351	No	Yes	No
Quo Ferro Investments Ltd Walker House 87 Mary Street George Town Grand Cayman Cayman Islands KY1 9005	FOREIGNUS	Cayman Islands	$ 87 681	Various	No	Cash	Section 351	No	Yes	No
Qoku Investments Ltd Walker House 87 Mary Street George Town Grand Cayman Cayman Islands KY1-9005	FOREIGNUS	Cayman Islands	$ 54 601	Various	No	Cash	Section 351	No	Yes	No
Oinoscope Investments Ltd Walker House 87 Mary Street George Town Grand Cayman Cayman Islands KY1-9005	FOREIGNUS	Cayman Islands	$ 76 721	Various	No	Cash	Section 351	No	Yes	No
Fletcher Finance Ltd Walker House 87 Mary Street George Town Grand Cayman Cayman Islands KY1-9005	FOREIGNUS	Cayman Islands	$ 25 574	Various	No	Cash	Section 351	No	Yes	No
Pallaton Investments Ltd Walker House 87 Mary Street George Town Grand Cayman Cayman Islands KY1-9005	FOREIGNUS	Cayman Islands	$ 233 818	Various	No	Cash	Section 351	No	Yes	No
Rochefort Investments Ltd Walker House 87 Mary Street George Town Grand Cayman Cayman Islands KY1 9005	FOREIGNUS	Cayman Islands	$ 241 124	Various	No	Cash	Section 351	No	Yes	No
Oorvus Investments Ltd Walker House 87 Mary Street George Town Grand Cayman Cayman Islands KY1-9005	FOREIGNUS	Cayman Islands	$ 138 829	Various	No	Cash	Section 351	No	Yes	No

TOTAL CASH 2,730,020
ENDING CAPITAL % 21.7915
TOTAL CASH TRANSFER 594,912

RETIREMENT RESEARCH FOUNDATION
CHICAGO, IL
SUMMARY OF REALIZED GAINS AND LOSSES

Form 990 PF Part IV Page 3 Line 1b 36-2429540

SHARES	NAME	BOUGHT	SOLD	PROCEEDS	COST	GAIN (LOSS)	LT	ST
22,360 0190	SEI OFFSHORE FUND	7/1/08	4/1/2009	18,571,225 58	22,360,000 00	(3,788,774 42)		
		4/1/09	6/4/2009	1,857,491 36	1,857,131 24	360 12		
82,981,655 8800	SEI DAILY INCOME FUND	VAR	VAR	82,981,655 88	82,981,655 88	0 00		
35,405 5120	SEI S&P 500 INDEX FUND	S	1/6/2009	899,300 00	1,256,988 92	(357,688 92)		
13,828 4700		S	2/3/2009	312,800 00	490,947 10	(178,147 10)		
1,131 4400		S	2/4/2009	25,989 19	40,169 10	(14,179 91)		
11,210 8510		S	3/24/2009	254,150 00	398,014 74	(143,864 74)		
1,336,572 7800		S	4/1/2009	29,177,383 79	47,329,863 67	(18,152,479 88)		
31,713 5210	SEI SMID EQUITY FUND	L	1/6/2009	236,900 00	430,159 17	(193,259 17)		
12,243 6850		L	2/3/2009	82,400 00	166,072.17	(83,672 17)		
1,009 7730		L	2/4/2009	6,846 26	13,696 46	(6,850 20)		
10,052.5530		L	3/24/2009	66,950 00	136,351 87	(69,401 87)		
1,096,909 2530		LS	4/1/2009	7,118,941 05	14,844,407 75	(7,725,466 70)	(7,339,297 96)	(386,168 74)
4,754 9910		S	4/2/2009	31,335 39	64,349 01	(33,013 62)		
28,907 1040	SEI CORE FIXED INCOME	L	1/6/2009	264,500 00	284,504 05	(20,004 05)		
10,000 0000		L	2/3/2009	92,000 00	98,388 88	(6,388 88)		
834 4850		L	2/4/2009	7,643 88	8,210 40	(566 52)		
8,214 2860		L	3/24/2009	74,750 00	80,794 15	(6,044 15)		
1,437,982 5440		LS	4/1/2009	13,171,920 10	14,143,722 57	(971,802 47)	(542,878 82)	(428,923 65)
6,287 8830		S	4/2/2009	57,534 13	57,597 01	(62 88)		
13,153.5940	SEI HY BOND FUND	L	1/6/2009	80,500 00	130,879 16	(50,379 16)		
375.8320		L	2/2/2009	2,326 40	3,724 77	(1,398 37)		
4,516 1290		L	2/4/2009	28,000 00	44,758.11	(16,758 11)		
3,829 9660		L	3/24/2009	22,750 00	37,808 59	(15,058 59)		
5,760 3440		S	3/24/2009	34,907 68	34,619 67	288 01		
521,447 6730		LS	4/1/2009	3,133,900 51	5,147,617 26	(2,013,716 75)	(1,765,550.95)	(248,165 80)
10,000 0000	SEI EMERG MKT DEBT	L	1/6/2009	80,500 00	107,187 93	(26,687 93)		
3,439 8040		L	2/2/2009	28,000 00	36,870 55	(8,870 55)		
28 4450		L	2/4/2009	2,326 38	3,059 63	(733 25)		
2,718 0410		L	3/24/2009	22,750 00	29,134 12	(6,384 12)		
10,397 7560		S	3/24/2009	85,677 51	110,832 55	(25,155 04)		
431,396 2270		S	4/1/2009	3,546,076 98	4,598,371 76	(1,052,294 78)	(990,249 76)	(62,045 02)
65,286 4580	SEI WORLD EQ EX US	L	1/6/2009	501,400 00	938,309 75	(436,909 75)		
26,265 0600		L	2/2/2009	174,400 00	377,486 58	(203,086 58)		
2,127 7740		L	2/4/2009	14,490 17	30,580 78	(16,090 61)		
20,686.1310		L	3/24/2009	141,700 00	297,305 12	(155,605 12)		
2,282,563.2260		LS	4/1/2009	15,064,917 26	32,805,445 54	(17,740,528 28)	(15,233,794 28)	(2,506,734 00)
24,858.3420	SEI REAL RETURN PLUS	L	1/6/2009	236,900 00	253,163 65	(16,263 65)		
8,433 9820		L	2/2/2009	82,400 00	85,893 81	(3,493 81)		
700 7420		L	2/4/2009	6,846 26	7,136 53	(290 27)		
6,735.4120		L	3/24/2009	66,950 00	68,595 14	(1,645 14)		
1,154,027 8620		LS	4/1/2009	11,551,818 90	11,752,911.90	(201,093 00)	(184,745 71)	(16,347 29)
2,000 0000	MID CAP SPDR TR SER 1	9/30/09	10/6/2009	250,233 57	248,060 00	2,173 57		
1,000 0000	STD & POORS DEP RECPT	9/30/09	10/6/2009	105,617 28	104,920 00	697 28		
				190,557,105 51	244,297,697 04	(53,740,591 53)		
						(53,740,591 53)		

2009 DEPRECIATION AND AMORTIZATION REPORT

Form 990-PF Page 1 990-PF

Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
	Automobile											
14	(D)Automobile	032404	SL	5.00	16	27,380.			27,380.	24,642.		2,738.
	* 990-PF Pg 1 Total - Automobile					27,380.		0.	27,380.	24,642.	0.	2,738.
	Computer Equipment											
6	Computer Equipment	063002	SL	5.00	16	2,096.			2,096.	2,096.		0.
8	Computer Equipment	063003	SL	5.00	16	2,728.			2,728.	2,728.		0.
15	Computer Equipment	Varies	SL	5.00	16	11,970.			11,970.	10,773.		1,197.
17	Computer Equipment	Varies	SL	5.00	16	51,302.			51,302.	35,932.		10,260.
19	Laser Jet Printer	041006	SL	5.00	16	1,351.			1,351.	674.		270.
22	Eaton Battery Backup	080108	SL	5.00	16	1,173.			1,173.	98.		235.
	* 990-PF Pg 1 Total - Computer Equipme					70,620.		0.	70,620.	52,301.	0.	11,962.
	Furniture & Fixtures											
2	Furniture & Fixtures	Varies	SL	5.00	16	79,085.		3,872.	75,213.	75,213.		0.
	* 990-PF Pg 1 Total - Furniture & Fixt					79,085.		3,872.	75,213.	75,213.	0.	0.
	Office Equipment											
5	Office Equipment	Varies	SL	5.00	16	7,815.			7,815.	7,815.		0.
20	Copy Machine	010606	SL	5.00	16	20,295.			20,295.	10,147.		4,059.

928102 06-24-09

(D) - Asset disposed

* ITC, Section 179, Salvage, Bonus, Commercial Revitalization Deduction

Form 990-PF Page 1

Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
23	Toshiba Strategy Phone System	040208	SL	5.00	16	8,623.			8,623.	862.		1,725.
	* 990-PF Pg 1 Total - Office Equipment					36,733.		0.	36,733.	18,824.	0.	5,784.
	Software											
3	Software	Varies	SL	5.00	16	13,953.			13,953.	13,953.		0
16	Software	070804	SL	5.00	16	11,188.			11,188.	10,071.		1,117.
18	Software	Varies	SL	5.00	16	4,440.			4,440.	3,015.		890.
21	Software-Retrospect	080706	SL	5.00	16	1,726.			1,726.	954.		345.
	* 990-PF Pg 1 Total - Software					31,307.		0.	31,307.	27,993.	0.	2,352.
	* Grand Total 990-PF Pg 1 Depr					245,125.		3,872.	241,253.	198,973.	0.	22,836.

(D) - Asset disposed

* ITC, Section 179, Salvage, Bonus, Commercial Revitalization Deduction

Form 990-PF	Interest on Savings and Temporary Cash Investments	Statement 1

Source	Amount
Shore Bank	50,933.
Total to Form 990-PF, Part I, line 3, Column A	50,933.

Form 990-PF	Dividends and Interest from Securities	Statement 2

Source	Gross Amount	Capital Gains Dividends	Column (A) Amount
Global Endowment Fund II LP	2,343,818.	0.	2,343,818.
Global Endowment Fund II LP	16,879.	0.	16,879.
Mid-Continent Capital	85,701.	0.	85,701.
SEI Core Fixed income Fund	232,850.	0.	232,850.
SEI Daily Income Prime Fund	1,001.	0.	1,001.
SEI Small/Mid Cap Equity Fund	30,384.	0.	30,384.
Shore Bank CDARS	20,113.	0.	20,113.
Siit Emerging Markets Debt Fund - 5290.392 Shares	85,158.	0.	85,158.
Siit High Yield Bond	135,376.	0.	135,376.
SIMT S&P 500 Index	206,795.	0.	206,795.
Total to Fm 990-PF, Part I, ln 4	3,158,075.	0.	3,158,075.

Form 990-PF	Other Income	Statement 3

Description	(a) Revenue Per Books	(b) Net Invest-ment Income	(c) Adjusted Net Income
Returned Grants	54,931.	0.	
UBTI	330,980.	0.	
Ordinary and Other Portfolio (Losses) from K-1	<248,193.>	0.	
Total to Form 990-PF, Part I, line 11	137,718.	0.	

Form 990-PF	Legal Fees	Statement 4

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
General legal fees relating to foundation program activity	8,876.	0.		8,876.
To Fm 990-PF, Pg 1, ln 16a	8,876.	0.		8,876.

Form 990-PF	Accounting Fees	Statement 5

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Auditing & consulting fees	54,565.	47,765.		6,800.
To Form 990-PF, Pg 1, ln 16b	54,565.	47,765.		6,800.

Form 990-PF	Other Professional Fees	Statement 6

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Investment custodial fees	0.	0.		0.
Investment management services	1,736,417.	1,736,417.		0.
Program Consultants	142,813.	0.		142,813.
To Form 990-PF, Pg 1, ln 16c	1,879,230.	1,736,417.		142,813.

Form 990-PF | Taxes | Statement 7

Description	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Excise tax	156,000.	0.		0.
Tax on Foreign Dividends	30,163.	30,163.		0.
To Form 990-PF, Pg 1, ln 18	186,163.	30,163.		0.

Form 990-PF | Other Expenses | Statement 8

Description	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Computer expense	33,607.	0.		33,607.
Insurance	9,802.	980.		8,822.
Office Supplies and Expense	11,918.	681.		11,237.
Dues and Memberships	7,940.	0.		7,940.
Postage and Shipping	7,181.	718.		6,463.
OCB Initiative Expenses	787.	0.		787.
To Form 990-PF, Pg 1, ln 23	71,235.	2,379.		68,856.

Form 990-PF | U.S. and State/City Government Obligations | Statement 9

Description	U.S. Gov't	Other Gov't	Book Value	Fair Market Value
Mid-Continent Capital-ETF's	X		4,300,892.	4,300,892.
SEI Real Return Plus Fund	X		0.	0.
Total U.S. Government Obligations			4,300,892.	4,300,892.
Total State and Municipal Government Obligations				
Total to Form 990-PF, Part II, line 10a			4,300,892.	4,300,892.

Form 990-PF | Corporate Stock | Statement 10

Description	Book Value	Fair Market Value
Mid-Continent Capital-ETF's	10,035,414.	10,035,414.
SEI S&P 500 Index Fund	0.	0.
SEI SMID Fund	0.	0.
SEI World Equity Ex US Fund	0.	0.
Total to Form 990-PF, Part II, line 10b	10,035,414.	10,035,414.

Form 990-PF | Corporate Bonds | Statement 11

Description	Book Value	Fair Market Value
SEI Core Fixed Income Fund	0.	0.
SEI Emerging Markets Debt Fund	0.	0.
SEI High Yield Bond Fund	0.	0.
Total to Form 990-PF, Part II, line 10c	0.	0.

Form 990-PF | Other Investments | Statement 12

Description	Valuation Method	Book Value	Fair Market Value
Global Endowment Fund II LP	FMV	99,358,980.	99,358,980.
SEI Off Shore Opportunity Fund II	FMV	0.	0.
Total to Form 990-PF, Part II, line 13		99,358,980.	99,358,980.

Form 990-PF | Depreciation of Assets Not Held for Investment | Statement 13

Description	Cost or Other Basis	Accumulated Depreciation	Book Value
Furniture & Fixtures	79,085.	75,213.	3,872.
Software	13,953.	13,953.	0.
Office Equipment	7,815.	7,815.	0.
Computer Equipment	2,096.	2,096.	0.
Computer Equipment	2,728.	2,728.	0.

Computer Equipment	11,970.	11,970.	0.
Software	11,188.	11,188.	0.
Computer Equipment	51,302.	46,192.	5,110.
Software	4,440.	3,905.	535.
Laser Jet Printer	1,351.	944.	407.
Copy Machine	20,295.	14,206.	6,089.
Software-Retrospect	1,726.	1,299.	427.
Eaton Battery Backup	1,173.	333.	840.
Toshiba Strategy Phone System	8,623.	2,587.	6,036.
Total To Fm 990-PF, Part II, ln 14	217,745.	194,429.	23,316.

Form 990-PF Part VIII - List of Officers, Directors Trustees and Foundation Managers Statement 14

Name and Address	Title and Avrg Hrs/Wk	Compen-sation	Employee Ben Plan Contrib	Expense Account
Nathaniel McParland, MD c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Chairman/Trustee 6.00	32,500.	0.	0.
Edward J. Kelly c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Trustee 4.00	24,500.	0.	0.
Sister Stella Louise Slomka c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Trustee 3.00	20,000.	0.	0.
Marvin Meyerson c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Trustee 3.00	20,000.	0.	0.
Ruth Ann Watkins c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Secretary/Trustee 3.00	20,000.	0.	0.
Bart T. Murphy c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Vice Chairman/Trustee 6.00	24,500.	0.	0.
Richard J. Kissel c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Trustee 3.00	20,000.	0.	0.

Irene Frye c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Executive Director 40.00	150,184.	12,142.	0.
Downey R. Varey c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Treasurer 1.00	0.	0.	0.
Robert T. Brehm c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Trustee 6.00	23,000.	0.	0.
Marilyn Hennessy c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Trustee 6.00	21,500.	0.	0.
Totals included on 990-PF, Page 6, Part VIII		356,184.	12,142.	0.

Form 990-PF Grant Application Submission Information Statement 15
Part XV, Lines 2a through 2d

Name and Address of Person to Whom Applications Should be Submitted

Irene Frye,Executive Director, Retirement Research Foundation
8765 W Higgins RD Ste 430
Chicago IL

Telephone Number

773-714-8080

Form and Content of Applications

See Attachment 1: General Program
See Attachment 2: Occupational Capacity Building Program
See Attachment 3: Accessible Faith Grant Program

Any Submission Deadlines

February 1, May 1, and August 1

Restrictions and Limitations on Awards

See Attachment 4: Guidelines

RETIREMENT RESEARCH FOUNDATION
CHICAGO, ILLINOIS

FORM 990 PF
DECEMBER 31, 2009
36-2429540

GENERAL PROGRAM
ATTACHMENT 1
Part XV Page 10 Line 2b
Pages 1 and 2

THE RETIREMENT RESEARCH FOUNDATION

For Grant Applicants

RRF FAQs

General Program

Guidelines

Application Procedures

Greater Chicago Area Programs

Resources for Applicants

General Program Guidelines

The Retirement Research Foundation is devoted exclusively to improving quality of life for our nation's older population We are especially committed to improving conditions for those who are vulnerable due to frailty associated with advanced age, those who are economically disadvantaged and at greatest risk of falling through the safety net, and those who experience disparities related to race and ethnicity

The Foundation's goals are to:

- Improve access to and quality of community-based and residential health and long-term care,
- Promote economic security for all older adults by strengthening social insurance, pension, and personal savings programs, and
- Support adequate training of and compensation for those working directly with the elderly and their families to assure the highest quality of care

High priority areas of interest:

The Retirement Research Foundation will give highest priority to the following areas

- Economic security,
- Affordable and supportive housing,
- Coordinating care when older persons transfer from one care setting to another;
- Person-centered long-term care, and
- Mental health

To achieve its goals, the Foundation supports nonprofits that provide:

- Advocacy,
- Replication of evidence-based programs, models and practices,
- Applied clinical, policy and social science research for which federal funding is not available,
- Education and training, and
- Direct service for older adults and/or their informal caregivers within a specified geographic area

Principles and practices that will guide Foundation decision-making:

Review of our grantmaking revealed key characteristics for success The Foundation will continue to give priority to organizations that embody the following

- Nonprofit best practices, such as strong leadership, responsible governance, fiscal responsibility and viability, and ongoing evaluation,
- Early planning and implementation of strategies to sustain the project for the future,
- True understanding of, and commitment to, person-centered care that promotes the dignity of older persons and their freedom to make life choices,
- Implementation of proven models and approaches that address clearly identified needs and gaps,
- Recognition that there are many excellent, proven models and approaches for which dissemination merits support,
- Use of clearly focused, collaborative advocacy to address systemic problems, and
- Forging of strategic partnerships with organizations in the field and funders to achieve better use of resources, and sharing of knowledge

The Accessible Faith Program and the Organizational Capacity Building Program will continue to be open to applicants exclusively from the metropolitan Chicago area

In making grants, Foundation trustees are guided by a number of general policies and considerations, including:

1 The Retirement Research Foundation's geographic restrictions apply only to requests for support of direct service projects Such direct service requests will be considered only from applicants in these seven states Illinois, Indiana, Iowa, Kentucky, Missouri, Wisconsin, and Florida Requests for support of other types of projects will be considered from applicants in any U S location
2 Funding for vans is limited to applicants from Illinois and Florida
3 Funding is generally limited to projects that are in keeping with the stated objectives
4 The Foundation is particularly interested in innovative projects that develop and/or demonstrate new approaches to the problems of older adults and have the potential for regional or national impact

Search

Site Map

5. The Foundation has a strong interest in serving the Chicago metropolitan area Where projects of equal significance are under consideration, priority is given to proposals that benefit this geographic area
6. Funding is not generally available for
   - Biomedical research
   - Computer equipment
   - Conferences, publications or travel unless they are components of other larger Foundation-funded projects
   - Construction of facilities
   - Dissertation research
   - Endowment or developmental campaigns
   - General operating expenses of established organizations
   - Grants or scholarships to individuals
   - Production of films and videos
   - Projects of governmental organizations except for state universities Area Agencies on Aging, and programs of the Veterans Administration
   - Projects outside the United States
7. More than three years of support generally is not provided Second-and third-year funding of an approved project is dependent upon progress during the first and second years
8. Organizations seeking funding must qualify under the regulations of the United States Internal Revenue Service

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RETIREMENT RESEARCH FOUNDATION
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ORGANIZATIONAL CAPACITY BUILDING INITIATIVE
ATTACHMENT 2
Part XV Page 10 Line 2b
Pages 1 and 2

THE RETIREMENT RESEARCH FOUNDATION

General Information

This section contains the following information

- Purpose of OCB program
- Applicant eligibility
- Application deadlines
- Specifics about the program
  - size of grants
  - examples of ways in which grants may be used
  - special features such as coaching and technical assistance
- Examples of OCB grants

Purpose of OCB Program

The purpose of the OCB Program is to help metropolitan Chicago area nonprofit organizations make long-term improvements in their management and governance and, by doing so, enhance and sustain their services to the elderly The Foundation believes that quality services are delivered by viable organizations and that it makes good sense to invest in the sustainability of nonprofit organizations to keep them healthy

The OCB Program was developed because the Foundation recognizes that nonprofit organizations serving the elderly are facing enormous pressures The demands to serve a rapidly growing senior population are increasing, but traditional sources of support are shrinking Government funding is shifting and uncertain, and private sector support for services to the elderly is modest Organizations face rapid technological change and a delivery environment that is in transition and requires much more accountability Nonprofits require bold and well-trained leaders and must be more transparent and accountable

Chicago area nonprofit organizations serving the elderly have told the Foundation that they need to focus more on strengthening their organizations – their staff, revenue streams, and operations Rather than seeking funding for innovative and cutting edge programs, at this time many nonprofit groups believe they must concentrate on making their organizations secure to enable them to fulfill their mission better over the long term

Applicant Eligibility

For an organization to be eligible for an OCB grant, it must meet the following criteria

- be a nonprofit organization, but not a unit of government,
- be located in Cook, DuPage, Kane, Kendall, Lake, or McHenry County, Illinois,
- provide services to the elderly, and
- intentionally give a high priority to the elderly

In the ten years in which the Foundation has been making OCB grants, it has funded 67 different nonprofit organizations They are of all types, including multi- and single-purpose providers, advocacy groups, religious bodies, and ethnic-specific organizations that provide direct services to the elderly They are of all sizes, from small budgets under $100,000 to budgets in the multi-millions The Foundation gives priority in its OCB Program to organizations that tend to be newer, less developed, and have smaller budgets The Foundation has found that these organizations generally have fewer resources and less management and governance experience However, larger and more established organizations are eligible if they can make the case for the need

Application Deadlines

OCB grant applications are considered three times a year and coincide with the Foundation's general deadlines The deadlines are February 1, May 1, and August 1 Decisions are usually made four months after each deadline

Specifics About the OCB Program

OCB funds generally support consulting and training fees, hardware and software related to information management, and staff and other costs directly related to capacity building activities OCB grants are made for a period of up to three years While there is no minimum or maximum amount for an OCB grant, the amount should fit the scope of the organizational capacity building activities Reviewing the **OCB section of the RRF grant lists** and the **case examples** may provide a better understanding of the OCB Program

The Foundation provides grants for capacity building activities that will help a nonprofit organization improve its management or governance to better serve the elderly The following are examples of activities that are supported but are not meant to exclude others

- planning (strategic, business, and financial plans) to steer an organization through changes,
- organizational assessments to identify problem areas that need to be strengthened,
- evaluation to develop outcome measures and determine progress in order to determine areas of improvement and strengthen accountability to constituents and funding sources,
- public relations, communications, and marketing to increase awareness and utilization of services,
- financial management and resource development to improve financial systems, explore revenue options, and develop a stronger funding base,
- human resources management to enhance professional development, do team building, and improve the working environment,
- information systems management, including technology enhancements, to improve efficiency and accountability,
- restructuring and building relations among organizations to strengthen service delivery, reduce costs, share resources, or achieve other benefits, and
- board development including assessment, recruitment, training, and structuring to strengthen the governance of the organization

The Foundation will not fund building renovation or capital improvements, emergency needs, deficits, or one-time events that do not build long-term capacity, i e fundraising events or one-time conferences

In addition to the grants, the OCB Program offers special features All organizations that receive a grant are eligible for additional funding over the course of their grant, to be used flexibly for technical assistance opportunities that arise during the course of the grant These may include seminars, workshops, short-term courses, publications, or other training opportunities related to organizational capacity building These opportunities may be identified by the grantee or the Foundation On occasion, the Foundation brings the OCB grantees together for training and experience exchange

A unique feature of the OCB Program is the availability of coaches The Foundation has recruited a team of coaches with broad management experience The coach is made available to the grantee on a continuing basis during the course of the OCB grant The coach serves as a mentor and provides an objective point of view, and the schedule is arranged between the coach and the grantee Up to 150 hours of coaching is provided over a three-year grant (For a description of the role of the coach, **click here**) Hours are prorated for shorter grant periods The coach's fee is paid for by the Foundation over and above the grant However, the relationship between the coach and the grantee is confidential and not discussed with the Foundation In the proposal, OCB applicants indicate whether or not they are interested in a coach

The Foundation encourages a team approach to organizational capacity building With previous OCB grants, the Foundation has found the team helpful in planning and implementing the project, providing continuity, and ensuring that the organizational capacity building effort becomes an integral part of the organization An OCB team usually consists of a small working group within the organization with representation from staff, board, and consultants

Selected Examples of OCB Grants

Two projects have been selected to provide examples of ways in which Foundation grants have been used to improve organizational capacity building

1. **GRANDFamilies Program of Chicago**
2. **Meals on Wheels Foundation of Cook County**

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RETIREMENT RESEARCH FOUNDATION
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ACCESSIBLE FAITH GRANT PROGRAM
ATTACHMENT 3
Part XV Page 10 Line 2b
Pages 1 and 2

THE RETIREMENT RESEARCH FOUNDATION

Accessible Faith Grant Program

The Foundation is pleased to announce that the Accessible Faith Grant Program will re-open in 2011 and be available to houses of worship in six Chicago area counties As in the past, houses of worship in Cook, Lake, and DuPage County will be eligible to apply Beginning in 2011, the program's territory will expand to include houses of worship in Kane, Kendall, and McHenry County Please check back in December for complete information on the program and updated application forms

Through the Accessible Faith Grant Program, the Foundation makes funds available to Chicago area houses of worship for accessibility improvements to their facilities Improvements, such as installation of ramps, lifts, automatic doors, accessible restrooms, and assistive listening systems, enhance the participation of older adults in the programs, services, and activities that occur in the facilities

In 2011, a total of $300,000 in Accessible Faith Grants will be available Houses of worship will be eligible for funding for up to 50% of a project's total cost The maximum grant amount will be $30,000

If you want to start planning early, the following links should help you, but please watch for updates and new forms for the 2011 Program

Detailed Program Description
Application Form and Instructions
Completing Your Accessible Faith Grant Application
List of Past Accessible Faith Grants

The following document may assist you in achieving the best outcome for your accessibility improvements
Tips for Maximizing Your Accessibility Improvements

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Partners for Sacred Places

If you are interested in accessibility of houses of worship, you may want to learn about Partners for Sacred Places, a RRF grantee, which recently opened a Chicago Regional Office. Partners for Sacred Places helps congregations and communities sustain and actively use older and historic places of worship. It provides information and referrals, training, and technical assistance

THE RETIREMENT RESEARCH FOUNDATION

Application Information

1 Download the application in either **word format**, **pdf format** or call 773-714-8080 to request a copy by mail

2 The information in the application may be typed or printed If printed, please use black or blue ink If typed or prepared by computer, please use 12-point type

3 Provide one signed original and one copy of the application form as well as the original and one copy of attachments or supporting materials

4 For construction projects, include two sets of several "before" photos with the application These should be glossy photos, not photos on a CD or sent by email Put your congregation's name and the current date on the back of each photo

5 Include copies of your congregation's letter of tax-exempt status under section 501 (c)(3) of the IRS The Foundation cannot consider applications that do not have proof of federal tax-exempt status NOTE This is NOT the Illinois Department of Revenue tax-exempt status letter

The Foundation requires evidence of both your congregation's federal tax-exempt status under section 501(c)(3) of the IRS and your congregation's 509(a) status (which became a requirement in 2006) Include copies of your IRS letter If your letter does not include your 509(a) status, then include other documentation of that status If your congregation is covered under a group ruling, submit both a copy of the IRS group ruling letter and a copy of the page from the official directory showing that your congregation is a member Note that your group letter will only cover the 501(c)(3) status and not the 509(a) status If you are unclear about this information, discuss it with officials from your judicatory You may also contact The Retirement Research Foundation if you have questions

6 Do not submit the application in a ring binder, folder, with pages in plastic sleeves, or any other binding or cover

7 Deliver or send the application and supporting materials to

The Retirement Research Foundation
ATTN Accessible Faith Grant Program
8765 W Higgins Rd
Suite 430
Chicago, IL 60631

8 The application must be received or postmarked by 5 00 pm Friday, June 25, 2010

9 If you have questions, please contact The Retirement Research Foundation at 773-714-8080 or by e-mail at **info@rrf.org**

Use additional sheets if necessary to respond fully to any questions

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RETIREMENT RESEARCH FOUNDATION
CHICAGO, ILLINOIS
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APPLICATION PROCEDURES
ATTACHMENT 4
Part XV Page 10 Line 2d
Pages 1 and 2

THE RETIREMENT RESEARCH FOUNDATION

General Application Procedures

General Program grant applications are normally considered three times a year Deadlines for receipt of requests are February 1, May 1 and August 1 Decisions are usually made four months after each deadline

NEW INSTRUCTIONS EFFECTIVE JULY 10, 2009

1) **Cover Sheet**
The cover sheet is the first required element of your application It is now a form to be completed electronically, printed out, and included with your full proposal The cover sheet is intended to ensure that you include all information that may strengthen your case for support, and to help the Foundation systematically gather information it needs to assess your proposal The form is available for download below

2) **Checklist**
This form is for your internal use only and does not need to be submitted to the Foundation It will help you ensure that you have included all the required components and necessary forms in your application packet To download the checklist, click here

Although The Retirement Research Foundation does not use a standard application form, proposals for funds should include the following elements

1. Cover Sheet

To download the cover sheet, click here

Note: You may need the latest version of Adobe Reader to fill in the form

To download Adobe Reader 9 3, click on the Adobe icon

2. Summary

A separate two-to-three-page statement summarizing project goals, significance, proposed methods, and cost

3. Project Significance

The importance and relevance of the proposed project should be explained Background information on the issue(s) to be addressed, existing knowledge and gaps, and the anticipated contribution of the project should be detailed

4. Statement of Objectives

Specific project objectives should be identified clearly, concisely, and completely The anticipated outcomes and/or accomplishments should be defined

5. Description of Methodology

Proposals to the Foundation fall into four general categories — model projects and service, advocacy for system change, education and training, and research — and each should include the following specific elements

Models Projects and Service description of program design, target audience(s), change(s) to be effected, resources and method of delivery, activity schedule and timeline to meet objectives, and evaluation criteria and methodology to evaluate project outcomes

Advocacy for System Change. description of strategies planned, list of partners and stakeholders to be organized, identification of decision-makers targeted, scheduling and coordination of activities, methods for outreach and dissemination, and the nature of evidence to be collected about impact

Education and Training target group description, educational needs to be met, content, methods, sequence, and location of educational experience, and evaluation criteria and methods

Research: description of experimental design, procedures to accomplish objectives, sequence of the investigation, types of data to be obtained, the ns by which it will be analyzed and interpreted, and ethic[illegible]ues regarding the use of human subjects

6. Dissemination

Describe plans for disseminating project outcomes and findings The dissemination plan should be appropriate for both the type and scope of the proposed project Describe projects to be disseminated and appropriate target audiences for each

7. Budget, Narrative Budget Justification, and Timetable

A timetable and line item budget for the project should include both grant funds requested from The Retirement Research Foundation and funds available from other sources for the project Where project personnel are engaged in other projects, the percent of time in and compensation from other projects should be identified A **narrative budget justification** should accompany the budget The foundation normally will not authorize computer purchases to conduct funded projects The Foundation limits payment of overhead rates to a maximum of 10 percent of project costs

8. Plans for Continued Support

If the project is expected to operate beyond the period for which grant funds are requested, describe plans for continued support

9. Personnel

Include resumes or curricula vitae (each not to exceed eight pages) for project director(s) and key personnel

10. Applicant Organization

Detail qualifications of applicant organization to implement project Include a brief history, accomplishments, financial reports and an annual report

11. Tax Exempt Status

Provide a copy of the applicant's tax exempt status under Section 501 (c)(3) of the Internal Revenue Code and a copy of the IRS determination letter classifying the applicant organization "not a private foundation" under Section 509 (a) of the Internal Revenue Code If this is not available, an explanation regarding the status of the applicant organization is needed A statement that the 501(c)(3) classification and the "not a private foundation" status has not been revoked or modified should be included

IMPORTANT INSTRUCTIONS REGARDING APPLICATION SUBMISSION:

1 Requests for funding must be signed by the chief executive officer of the applicant organization
2 An original and one copy of the proposal and attachments must be submitted (applicants for research funding should submit an original and two copies) Only one copy of the annual report and financials/audit are needed

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Statement 16

RETIREMENT RESEARCH FOUNDATION
CHICAGO, ILLINOIS
FORM 990 PF YEAR ENDED 12-31-09
36-4324067

Statement for Retirement Research Foundation 12-31-09 Form 990-PF, Part VII-B, line 7a:

The Foundation is a limited partner in a partnership that invests in other investment funds. The Foundation has no intention of entering into any listed transaction or reflecting on its tax return a reduction or elimination of its liability for applicable federal employment, excise, or unrelated business income taxes that is derived directly or indirectly from tax consequences or tax strategy described in the published guidance that lists any transaction. To the extent that it appears at any time that any such reduction or elimination may have been reflected, the Trust will file an amended Form 990-PF or Form 990-T so as not to take advantage of any tax consequences or tax strategy described in the published guidance that lists the transaction. Accordingly, the Foundation was not a party to any prohibited tax shelter transaction.

RETIREMENT RESEARCH FOUNDATION
CHICAGO, ILLINOIS
FORM 990 PF
DECEMBER 31, 2009
36-2429540

GRANTS PAID
ATTACHMENT A
PART XV
Page 11
DETAILS TO LINE 3a
Pages 1 through 39

The Retirement Research Foundatiion -- EIN 36-2429540

Paid Date is any date between 1/1/2009 and 12/31/2009 -- Attachment "A"

13 October 2010

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
A Day in Time, Inc.				
2009106	**A Day in Time, Inc.** Immanuel Lutheran Church 1229 Park Row Lake Geneva, Wisconsin 53174	509(a)(2)	One-year grant for outreach and education efforts targeting rural caregivers of people with Alzheimer's disease	$10,000
Total A Day in Time, Inc (1 item)				$10,000
AgeOptions				
2009078	**AgeOptions** 1048 West Lake Street, Suite 300 Oak Park, Illinois 60301-1102	509(a)(1)	Partial support to train 150 direct service professionals about new benefit programs for elders impacted by the economic downturn.	$2,182
2009220	**AgeOptions** 1048 West Lake Street, Suite 300 Oak Park, Illinois 60301-1102	509(a)(1)	One-year grant to continue leading the education and training function of the Make Medicare Work Coalition to build capacity of service providers and advocates to assist vulnerable seniors with health care benefits	$47,000
Total AgeOptions (2 items)				$49,182
Aging Care Connections				
2009064	**Aging Care Connections** 111 West Harris Avenue La Grange, Illinois 60525	509(a)(1)	One-year grant to continue coordinated discharge planning services supporting safe transitions for older persons being discharged from hospitals, rehabilitation, facilities, and nursing homes	$35,000
Total Aging Care Connections (1 item)				$35,000
Alivio Medical Center				
2008257	**Alivio Medical Center** 966 West 21st Street Chicago, Illinois 60608	509(a)(1)	Three-year grant to design and implement a chronic disease self-management program for seniors.	$37,500

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
2008257	**Alivio Medical Center** 966 West 21st Street Chicago, Illinois 60608	509(a)(1)	Three-year grant to design and implement a chronic disease self-management program for seniors.	$37,500
Total Alivio Medical Center (2 items)				$75,000
Alliance for Aging Research				
2009092	**Alliance for Aging Research** 2021 K Street, N W , Suite 305 Washington, DC 20006-1003	509(a)(1)	One-year grant for continued program support	$30,000
Total Alliance for Aging Research (1 item)				$30,000
Alzheimer's Association				
2008141	**Alzheimer's Association** Greater Illinois Chapter 8430 W. Bryn Mawr, Ste. 800 Chicago, Illinois 60631	509(a)(1)	Thirty-month grant to replicate a model of palliative care for people with advanced dementia in two skilled care facilities and Rainbow Hospice in order to improve quality of life based on comfort rather than traditional medical care	$55,536
2008141	**Alzheimer's Association** Greater Illinois Chapter 8430 W Bryn Mawr, Ste 800 Chicago, Illinois 60631	509(a)(1)	Thirty-month grant to replicate a model of palliative care for people with advanced dementia in two skilled care facilities and Rainbow Hospice in order to improve quality of life based on comfort rather than traditional medical care.	$70,463
Total Alzheimer's Association (2 items)				$125,999
Alzheimer's Association of St. Louis				
2007290	**Alzheimer's Association of St. Louis** 9374 Olive Boulevard St Louis, Missouri 63132-3214	509(a)(1)	Eighteen-month grant for a two-part training project to improve hospital care of persons with Alzheimer's or other forms of memory loss	$30,000
Total Alzheimer's Association of St Louis (1 item)				$30,000

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
American Academy of Home Care Physicians				
2009135	**American Academy of Home Care Physicians** P. O Box 1037 Edgewood, Maryland 21040-0337	509(a)(1)	Three-month grant for advocacy to get families whose frail older loved ones benefit from home-based medical care to deluge Washington decision makers so that that the issue of reimbursement for home-care is included in ongoing discussions for health reform in summer 2009	$19,500
Total American Academy of Home Care Physicians (1 item)				$19,500
American Psychological Association				
2009076	**American Psychological Association** 750 First Street, N E. Washington, DC 20002-4242	509(a)(2)	One-year grant to continue an awards program recognizing students who conduct promising research about the psychology of aging, and explore future options for funding the program.	$21,600
Total American Psychological Association (1 item)				$21,600
American Public Health Association				
2008070	**American Public Health Association** 800 I Street, N.W. Washington, DC 20001-3710	509(a)(2)	Ten-year grant ($6,000 each year) for awards to six students annually for research excellence in gerontological health	$6,000
Total American Public Health Association (1 item)				$6,000
Arab American Family Services				
2008227	**Arab American Family Services** 9044 South Octavia Avenue Bridgeview, Illinois 60455	509(a)(1)	Second-year request to expand case management services to Arab/Muslim-American older adults	$41,322
2008227	**Arab American Family Services** 9044 South Octavia Avenue Bridgeview, Illinois 60455	509(a)(1)	Second-year request to expand case management services to Arab/Muslim-American older adults.	$41,322
Total Arab American Family Services (2 items)				$82,644

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Areawide Council on Aging of Broward County, Inc.				
2009219	**Areawide Council on Aging of Broward County, Inc.** 5345 Hiatus Road Sunrise, Florida 33351	509(a)(1)	One-year grant to replicate "A Matter of Balance," an evidence-based falls prevention program for seniors at risk	$30,000
Total Areawide Council on Aging of Broward County, Inc (1 item)				$30,000
Avila Institute of Gerontology, Inc.				
2009031	**Avila Institute of Gerontology, Inc.** Saint Teresa's Motherhouse 600 Woods Road Germantown, New York 12526-5639	509(a)(1)	One-year grant to implement a computer system designed to improve person-centered care for many residents in nursing home facilities, and examine the effects on residents' quality of life and staff satisfaction	$49,900
Total Avila Institute of Gerontology, Inc (1 item)				$49,900
Bazelon Center for Mental Health Law				
2009098	**Bazelon Center for Mental Health Law** 1101 Fifteenth Street N.W. Suite 1212 Washington, DC 20005-5002	509(a)(1)	One-year grant to protect and advocate for the civil rights of low-income older persons with mental illness by engaging in a class action case related to the Supreme Court's Olmstead decision that mandates persons with mental illness receive treatment in the most integrated setting suited to their needs.	$15,000
Total Bazelon Center for Mental Health Law (1 item)				$15,000
Bellarmine Jesuit Retreat House				
2008146	**Bellarmine Jesuit Retreat House** 175 West County Line Road Barrington, Illinois 60010-4043	509(a)(1)	Two-year grant to replace an elevator used by elderly retreatants.	$25,000
Total Bellarmine Jesuit Retreat House (1 item)				$25,000
Beth Tikvah Congregation				
2008205	**Beth Tikvah Congregation** 300 Hillcrest Boulevard Hoffman Estates, Illinois 60169-3168		A 12-month grant to install electric door openers.	-$2,864

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
2008205	**Beth Tikvah Congregation** 300 Hillcrest Boulevard Hoffman Estates, Illinois 60169-3168		A 12-month grant to install electric door openers	$2,864
2008205	**Beth Tikvah Congregation** 300 Hillcrest Boulevard Hoffman Estates, Illinois 60169-3168		A 12-month grant to install electric door openers	$2,864
Total Beth Tikvah Congregation (3 items)				$2,864
Bethel New Life, Inc.				
2009065	**Bethel New Life, Inc.** 4950 West Thomas Chicago, Illinois 60651	509(a)(1)	One-year grant for a social-model adult day services program serving low-income elderly	$20,000
Total Bethel New Life, Inc (1 item)				$20,000
Bi-Lingual International Assistant Services				
2009213	**Bi-Lingual International Assistant Services** 8390 Delmar Blvd., Suite 210 St Louis, Missouri 63124	509(a)(1)	One-year grant to assist immigrant elderly with limited English proficiency and multiple disabling conditions become U S citizens and access benefit programs.	$15,000
Total Bi-Lingual International Assistant Services (1 item)				$15,000
Boca Institute for Quality Aging				
2008207	**Boca Institute for Quality Aging** 632 Glades Road Boca Raton, Florida 33431	509(a)(1)	One-year grant to develop and pilot test a program to improve the quality of life and care for older people by addressing the transition between the acute hospital and home	-$4,456
Total Boca Institute for Quality Aging (1 item)				-$4,456
Boca Raton Community Hospital Foundation				
2009005	**Boca Raton Community Hospital Foundation** 745 Meadows Road Boca Raton, Florida 33486	509(a)(1)	One-year partial support of Patient Cardiovascular monitoring system in the emergency department.	$25,000
Total Boca Raton Community Hospital Foundation (1 item)				$25,000

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Boston University				
2008049	**Boston University** 88 East Newton Street Boston, Massachusetts 02218	509(a)(1)	One-year grant to study associations between the use of cardiovascular medications and cognitive decline in older adults	$88,000
Total Boston University (1 item)				$88,000
Brown University				
2008086	**Brown University** Box G-B213 Providence, Rhode Island 02912	509(a)(1)	Three year grant to study how widespread the adoption of long-term care culture change is nationally, and to assess its quality of life and quality of care outcomes	$46,299
2008086	**Brown University** Box G-B213 Providence, Rhode Island 02912	509(a)(1)	Three year grant to study how widespread the adoption of long-term care culture change is nationally, and to assess its quality of life and quality of care outcomes.	$46,299
Total Brown University (2 items)				$92,598
Career Resource Center				
2008037	**Career Resource Center** 40 East Old Mill Road, Suite 105 Lake Forest, Illinois 60045	509(a)(1)	Three-year grant to develop and implement a marketing and communications program	$21,000
Total Career Resource Center (1 item)				$21,000
Carey Tercentenary AME Church				
2009151	**Carey Tercentenary AME Church** 1448 S. Homan Avenue Chicago, Illinois 60623	509(a)(1)	An 18-month grant to install an enclosed platform lift that will provide access to all three levels of the building	$30,000
Total Carey Tercentenary AME Church (1 item)				$30,000
Catholic Charities of the Archdiocese of Chicago				
2009103	**Catholic Charities of the Archdiocese of Chicago** St. Vincent Center 721 North LaSalle Street Chicago, Illinois 60654-3503	509(a)(1)	One-year grant to purchase a handicapped accessible bus to ensure that community resources and supportive services are accessible to low-income residents living in a newly constructed affordable housing complex	$30,000
Total Catholic Charities of the Archdiocese of Chicago (1 item)				$30,000

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Catholic Charities, Inc. - Diocese of Madison				
2009215	**Catholic Charities, Inc. - Diocese of Madison** 702 S. High Point Road Madison, Wisconsin 53719	509(a)(1)	One-year grant to provide in-home respite care for frail older adults and their informal or family caregivers by expanding a collaborative program model that uses teams of trained volunteers from local faith congregations	$67,285
Total Catholic Charities, Inc - Diocese of Madison (1 item)				$67,285
Catholic Community Connection				
2008166	**Catholic Community Connection** 2351 East 22nd Street Cleveland, Ohio 44115	509(a)(1)	Two-year grant for a training program for nurses on whole-person care [MH was original program officer for this]	$36,280
2008166	**Catholic Community Connection** 2351 East 22nd Street Cleveland, Ohio 44115	509(a)(1)	Two-year grant for a training program for nurses on whole-person care. [MH was original program officer for this]	$36,281
Total Catholic Community Connection (2 items)				$72,561
Center for Disability and Elder Law				
2008068	**Center for Disability and Elder Law** 79 West Monroe Street, Suite 919 Chicago, Illinois 60603	509(a)(1)	Three-year grant for website development, improved database for client management, Board development, and increased staffing	$15,000
Total Center for Disability and Elder Law (1 item)				$15,000
Center for Medicare Advocacy, Inc.				
2008212	**Center for Medicare Advocacy, Inc.** 1025 Connecticut Avenue NW, Suite 709 Washington, DC 20036	509(a)(1)	Two-year grant to improve the capacity of Medicare advocates and beneficiaries to handle complex Medicare appeals processes, resulting in greater access to needed health care	$37,500
2008212	**Center for Medicare Advocacy, Inc.** 1025 Connecticut Avenue NW, Suite 709 Washington, DC 20036	509(a)(1)	Two-year grant to improve the capacity of Medicare advocates and beneficiaries to handle complex Medicare appeals processes, resulting in greater access to needed health care	$37,500

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Total Center for Medicare Advocacy, Inc (2 items)				$75,000
Centers for New Horizons				
2008278	**Centers for New Horizons** 4150 South King Drive Chicago, Illinois 60653	509(a)(1)	One-year grant to support development of seniors as community leaders	$25,000
Total Centers for New Horizons (1 item)				$25,000
Central DuPage Health Foundation				
2008243	**Central DuPage Health Foundation** 27W353 Jewell Road Winfield, Illinois 60190	509(a)(1)	One-year grant to continue to build organizational capacity in the areas of resource development and public awareness	$29,600
Total Central DuPage Health Foundation (1 item)				$29,600
Central Illinois Organizing Project				
2007262	**Central Illinois Organizing Project** 501 E. Washington Street, Suite 309 Bloomington, Illinois 61701	509(a)(1)	Two-year grant to empower and advocate with older adults to protect them from predatory lending and home foreclosure	$50,000
2009179	**Central Illinois Organizing Project** 501 E. Washington Street, Suite 309 Bloomington, Illinois 61701	509(a)(1)	One-year grant o continue anti-predatory lending campaign to strengthen policies that address foreclosure solutions for older adults and protect against potentially harmful loan products	$35,000
Total Central Illinois Organizing Project (2 items)				$85,000
Chicago Lights				
2008054	**Chicago Lights** 126 East Chestnut Street Chicago, Illinois 60611	509(a)(2)	Three-year grant to continue to develop and implement member-driven programs and marketing strategies that will attract and serve more older adults, especially recent retirees in the 60 to 70 age group	$25,720
2008054	**Chicago Lights** 126 East Chestnut Street Chicago, Illinois 60611	509(a)(2)	Three-year grant to continue to develop and implement member-driven programs and marketing strategies that will attract and serve more older adults, especially recent retirees in the 60 to 70 age group	$33,052
Total Chicago Lights (2 items)				$58,772

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
ChildServ				
2008038	**ChildServ** 8765 W. Higgins Rd , Suite 450 Chicago, Illinois 60631	509(a)(1)	One year grant to expand programs serving grandparent-headed families	$37,500
Total ChildServ (1 item)				$37,500
Chinese American Service League				
2009209	**Chinese American Service League** 2141 South Tan Court Chicago, Illinois 60616	509(a)(1)	One-year grant to translate into Chinese Healthy IDEAS, an evidence-based depression screening and management program for social workers serving older adults	$50,000
Total Chinese American Service League (1 item)				$50,000
Chinese Mutual Aid Association				
2007298	**Chinese Mutual Aid Association** 1016 West Argyle Street Chicago, Illinois 60640	509(a)(2)	Three-year grant in partial support to establish the Golden Age Club, a senior program providing comprehensive senior services to ethnically diverse immigrant and refugee communities in Uptown neighborhood of Chicago	$55,000
Total Chinese Mutual Aid Association (1 item)				$55,000
Christian Community Health Fellowship				
2006167	**Christian Community Health Fellowship** 2595 Central Avenue Memphis, Tennessee 38104	509(a)(1)	A 15-month grant for phase one of a three-phase project to bring existing geriatrics training materials to health teams serving low-income elderly at community health centers nationwide	$46,109
Total Christian Community Health Fellowship (1 item)				$46,109
CJE SeniorLife				
2007038	**CJE SeniorLife** 3003 West Touhy Avenue Chicago, Illinois 60645	509(a)(1)	Requests $213,111 over two years to refine a self-neglect assessment instrument, validate it, establish its psychometric properties, and identify outcome measures to study the impact of services on self-neglecting seniors	$52,906

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
2007038	**CJE SeniorLife** 3003 West Touhy Avenue Chicago, Illinois 60645	509(a)(1)	Requests $213,111 over two years to refine a self-neglect assessment instrument, validate it, establish its psychometric properties, and identify outcome measures to study the impact of services on self-neglecting seniors.	$52,906
2007038	**CJE SeniorLife** 3003 West Touhy Avenue Chicago, Illinois 60645	509(a)(1)	Requests $213,111 over two years to refine a self-neglect assessment instrument, validate it, establish its psychometric properties, and identify outcome measures to study the impact of services on self-neglecting seniors	-$52,906
2008262	**CJE SeniorLife** 3003 West Touhy Avenue Chicago, Illinois 60645	509(a)(1)	Requests $150,000 over three years to adapt, implement, and evaluate an aging in place service model for Orthodox Jewish elderly	$50,000
Total CJE SeniorLife (4 items)				$102,906
Coalition of Limited English Speaking Elderly				
2008122	**Coalition of Limited English Speaking Elderly** 53 W Jackson Boulevard, Suite 1301 Chicago, Illinois 60604-3702	509(a)(1)	Third-year support of the new mental health program, focusing on the need for education and training in the ethnic communities about mental health issues and how to identify seniors needing help and referrals for assistance	$37,500
2009139	**Coalition of Limited English Speaking Elderly** 53 W. Jackson Boulevard, Suite 1301 Chicago, Illinois 60604-3702	509(a)(1)	One-year grant to bring depression screening and support to 330 ethnically diverse older Chicagoans being served by seven member agencies	$40,000
Total Coalition of Limited English Speaking Elderly (2 items)				$77,500
Community Presbyterian Church at Mount Prospect				
2009093	**Community Presbyterian Church at Mount Prospect** 407 North Main Street Mount Prospect, Illinois 60056	509(a)(1)	An 18-month grant to install a platform lift for access to the lower-level event hall, kitchen, and classrooms	$30,000
Total Community Presbyterian Church at Mount Prospect (1 item)				$30,000

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Companion Day Services, Inc.				
2009174	**Companion Day Services, Inc.** 905 Tiny Tigers Court Marshfield, Wisconsin 54449	509(a)(2)	One-year grant to support a social-model adult day service program serving low-income elderly	$4,000
Total Companion Day Services, Inc (1 item)				$4,000
Cornell University				
2005294	**Cornell University** 121 Second Street Oriskany, New York 13424	509(a)(1)	Request $204,203 over three years to develop a virtual home, available via the Internet and a CD-rom, that will illustrate solutions to home safety and functional problems for people with Alzheimer's disease.	$43,726
Total Cornell University (1 item)				$43,726
Council on Foundations				
2009083	**Council on Foundations** 2121 Crystal Drive, Suite 700 Arlington, Virginia 22202	509(a)(1)	Program support 2009.	$19,620
Total Council on Foundations (1 item)				$19,620
Donors Forum				
2009002	**Donors Forum** 208 South LaSalle Street, Suite 1540 Chicago, Illinois 60604	509(a)(1)	Program support for 2009.	$18,487
Total Donors Forum (1 item)				$18,487
East Carolina University Foundation Inc.				
2008103	**East Carolina University Foundation Inc.** 2200 S Charles Blvd Greenville, North Carolina 27858	509(a)(1)	Two-year grant to examine the effects of a model music program for promoting new cognitive skills and enhancing self-efficacy among seniors	$57,604
Total East Carolina University Foundation Inc (1 item)				$57,604

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Easter Seals, National Office				
2007023	**Easter Seals, National Office** 233 S. Wacker Drive, Suite 2400 Chicago, Illinois 60606	509(a)(2)	Two-year grant to provide training to adult day services and hospice programs about each others' roles as a means of improving collaboration on end-of-life care for the elderly.	$63,403
Total Easter Seals, National Office (1 item)				$63,403
Economic Opportunity Institute				
2007229	**Economic Opportunity Institute** 1900 North Northlake Way, Suite 237 Seattle, Washington 98103	509(a)(1)	Eighteen-month grant to implement URSA (universal retirement savings program) in the state of Washington and to encourage replication of the model by other states	$50,000
2009069	**Economic Opportunity Institute** 1900 North Northlake Way, Suite 237 Seattle, Washington 98103	509(a)(1)	One-year grant to continue developing, coordinating, and implementing policy to establish a universal retirement savings account program in several states that will provide a low-cost, portable defined contribution account for every worker and enable all workers, especially those with low or moderate incomes or employed by small businesses, to save for retirement	$37,500
Total Economic Opportunity Institute (2 items)				$87,500
Elderday Center, Inc.				
2009122	**Elderday Center, Inc.** 8 South Lincoln Batavia, Illinois 60510	509(a)(1)	Three-month grant to engage in an Organizational Readiness Assessment process to identify and prioritize potential areas of growth in organizational capacity building.	$2,000
Total Elderday Center, Inc (1 item)				$2,000
Epiphany Parish				
2009087	**Epiphany Parish** 2524 S. Keeler Avenue Chicago, Illinois 60623	509(a)(1)	An 18-month grant to install two ramps for access to the church and community center.	$30,000
Total Epiphany Parish (1 item)				$30,000

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Escorted Transportation Services Northwest				
2008221	**Escorted Transportation Services Northwest** 1801 West Central Road Arlington Heights, Illinois 60005	509(a)(1)	Two-year grant to continue capacity building, focusing on fundraising, marketing, and volunteer training	$33,000
Total Escorted Transportation Services Northwest (1 item)				$33,000
Esteem Music, Inc.				
2009014	**Esteem Music, Inc.** 121 Carleton Street Lakeland, Florida 33803	509(a)(1)	Third-year grant to continue and expand a program to improve the quality of life of underserved senior citizens through the Recreational Music Making program (an age-specific keyboard and organ course that is group-based, emphasizes social interaction, and focuses on the well-being of participants, including physically disabled participants and those who have dementia-related conditions)	$15,000
Total Esteem Music, Inc. (1 item)				$15,000
Faith in Action of McHenry County				
2007129	**Faith in Action of McHenry County** 7105 Virginia Road, Suite 21 Crystal Lake, Illinois 60014	509(a)(1)	Three-year grant to develop a public relations and marketing program, and to establish a resource development plan.	$4,175
Total Faith in Action of McHenry County (1 item)				$4,175
Families USA Foundation				
2008178	**Families USA Foundation** 1201 New York Avenue, NW, Suite 1100 Washington, DC 20005	509(a)(1)	Two-year grant for support to 1)improve the capacity of the State Health Insurance and Assistance Programs (SHIPs) to resolve systemic problems of Medicare and become better counselors for Medicare recipients and 2) build the capacity of the Health Assistance Partnership (HAP) to become a better advocate for Medicare improvements at the national level.	$74,970

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
2008178	**Families USA Foundation** 1201 New York Avenue, NW, Suite 1100 Washington, DC 20005	509(a)(1)	Two-year grant for support to. 1)improve the capacity of the State Health Insurance and Assistance Programs (SHIPs) to resolve systemic problems of Medicare and become better counselors for Medicare recipients and 2) build the capacity of the Health Assistance Partnership (HAP) to become a better advocate for Medicare improvements at the national level	$75,074
Total Families USA Foundation (2 items)				$150,044
Family Caregiver Alliance				
2008260	**Family Caregiver Alliance** 180 Montgomery Street, Suite 900 San Francisco, California 94105	509(a)(1)	An 18-month grant to facilitate advocacy around state and federal policies designed to assist family caregivers through organization and dissemination of policy and resources	$53,775
2008260	**Family Caregiver Alliance** 180 Montgomery Street, Suite 900 San Francisco, California 94105	509(a)(1)	An 18-month grant to facilitate advocacy around state and federal policies designed to assist family caregivers through organization and dissemination of policy and resources	$53,775
Total Family Caregiver Alliance (2 items)				$107,550
Florida Atlantic University				
2007234	**Florida Atlantic University** 777 Glades Rd Boca Raton, Florida 33431	509(a)(1)	Two-year grant to enhance the competency of medical students and nurse practitioner students in diagnosis and treatment of dementia and to understand the roles these professionals play in delivery of care	$69,984
Total Florida Atlantic University (1 item)				$69,984
Florida International University				
2003160	**Florida International University** 3000 N E. 145 Street North Miami, Florida 33181-3600	509(a)(1)	Two-year grant to test if increasing the energy protein density of foods can raise caloric/protein intake of nursing home residents and improve health outcomes.	-$8,561
Total Florida International University (1 item)				-$8,561

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Galata, Inc.				
2008067	**Galata, Inc.** 916 N. Flagler Avenue Homestead, Florida 33030	509(a)(1)	Two years grant to expand health, education, recreation, and social services to immigrant and minority elderly in Florida's Deep South	$30,000
2008067	**Galata, Inc.** 916 N Flagler Avenue Homestead, Florida 33030	509(a)(1)	Two years grant to expand health, education, recreation, and social services to immigrant and minority elderly in Florida's Deep South	$50,000
Total Galata, Inc (2 items)				$80,000
GRANDFamilies Program of Chicago				
2007151	**GRANDFamilies Program of Chicago** 400 West 76th Street Suite 112 Chicago, Illinois 60620	509(a)(1)	Two-year grant to hire a housing coordinator to develop a citywide housing resource center for grandfamilies and to evaluate the impact of these assistance programs on the well-being of grandfamilies.	$34,600
Total GRANDFamilies Program of Chicago (1 item)				$34,600
Grantmakers in Aging				
2009156	**Grantmakers in Aging** 7333 Paragon Road, Suite 220 Dayton, Ohio 45459-4157	509(a)(1)	Partial support of the 2009 Annual Conference	$10,000
Total Grantmakers in Aging (1 item)				$10,000
Grantmakers in Health				
2009089	**Grantmakers in Health** 1100 Connecticut Ave , N W , Suite 1200 Washington, DC 20036	509(a)(1)	Program support for 2009.	$12,000
Total Grantmakers in Health (1 item)				$12,000
Guild for the Blind				
2009186	**Guild for the Blind** 180 N Michigan Avenue, Suite 1700 Chicago, Illinois 60601-7463	509(a)(1)	One-year grant to provide support, education, and training that will help seniors with vision loss remain independent and active	$18,000

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Total Guild for the Blind (1 item)				$18,000
Hamdard Center for Health and Human Services				
2008153	**Hamdard Center for Health and Human Services** 1542 W Devon Avenue Chicago, Illinois 60660	509(a)(2)	Two-year grant in partial support for a full-time position to manage the adult day program located on the far north side of Chicago	$20,000
Total Hamdard Center for Health and Human Services (1 item)				$20,000
Health & Disability Advocates				
2007308	**Health & Disability Advocates** 205 W. Monroe Street, 3rd Floor Chicago, Illinois 60606-5013	509(a)(1)	Two-year grant to continue the Make Medicare Work Coalition's education and advocacy efforts around the Medicare Prescription Drug (Part D) and the State Pharmaceutical Assistance Programs	$62,500
2007308	**Health & Disability Advocates** 205 W Monroe Street, 3rd Floor Chicago, Illinois 60606-5013	509(a)(1)	Two-year grant to continue the Make Medicare Work Coalition's education and advocacy efforts around the Medicare Prescription Drug (Part D) and the State Pharmaceutical Assistance Programs.	$62,500
2009222	**Health & Disability Advocates** 205 W. Monroe Street, 3rd Floor Chicago, Illinois 60606-5013	509(a)(1)	One-year grant to continue serving as the policy leader for the Make Medicare Work Coalition that assures federal and state programs provide meaningful benefits for all Medicare consumers, especially the most vulnerable.	$34,000
Total Health & Disability Advocates (3 items)				$159,000
Health and Medicine Policy Research Group				
2008011	**Health and Medicine Policy Research Group** 29 E. Madison Street, Suite 602 Chicago, Illinois 60602-4404	509(a)(1)	Eighteen-month grant for research, coalition building, and advocacy in support of state plans for rebalancing Illinois' long-term care system.	$46,667
Total Health and Medicine Policy Research Group (1 item)				$46,667
Heartland Health Outreach, Inc.				
2009204	**Heartland Health Outreach, Inc.** 1015 W Lawrence Ave , 2nd Floor Chicago, Illinois 60640	509(a)(1)	One-year grant to study the oral health needs of older Chicagoans living in independent and assisted settings	$16,000

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Total Heartland Health Outreach, Inc (1 item)				$16,000
Hebrew Senior Life Institute for Aging Research				
2007225	**Hebrew Senior Life Institute for Aging Research** 1200 Centre Street Boston, Massachusetts 02131-1097	509(a)(1)	Three-year grant to examine and understand the processes and procedures of the Hospital Elder Life Program (HELP), a model of care to prevent delirium in hospitalized older adults, in order to develop guidelines for replication in additional sites.	$38,884
2007225	**Hebrew Senior Life Institute for Aging Research** 1200 Centre Street Boston, Massachusetts 02131-1097	509(a)(1)	Three-year grant to examine and understand the processes and procedures of the Hospital Elder Life Program (HELP), a model of care to prevent delirium in hospitalized older adults, in order to develop guidelines for replication in additional sites	$36,781
Total Hebrew Senior Life Institute for Aging Research (2 items)				$75,665
Hispanic Unity of Florida, Inc.				
2006289	**Hispanic Unity of Florida, Inc.** 5840 Johnson Street Hollywood, Florida 33021	509(a)(1)	Three-year grant to improve health care access, with an emphasis on preventive healthcare for immigrant seniors in southeastern Florida	$21,869
2006289	**Hispanic Unity of Florida, Inc.** 5840 Johnson Street Hollywood, Florida 33021	509(a)(1)	Three-year grant to improve health care access, with an emphasis on preventive healthcare for immigrant seniors in southeastern Florida.	$21,869
Total Hispanic Unity of Florida, Inc (2 items)				$43,738
Horizon Hospice & Palliative Care				
2008034	**Horizon Hospice & Palliative Care** 833 West Chicago Avenue Chicago, Illinois 60622	509(a)(1)	One-year grant to continue bringing effective advance care planning to Metro Chicago through the Someone to Trust program	$42,500
2009027	**Horizon Hospice & Palliative Care** 833 West Chicago Avenue Chicago, Illinois 60622	509(a)(1)	One-year OCB grant to support the organization's training and management needs during its transition to Electronic Medical Records for improved organizational effectiveness and enhanced capacity for quality improvement through updated technology.	$33,741

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Total Horizon Hospice & Palliative Care (2 items)				$76,241
Housing Action Illinois				
2008158	**Housing Action Illinois** 11 E Adams Street, Suite #1601 Chicago, Illinois 60603	509(a)(1)	Third-year grant to organize community-based organizations serving older persons to develop and implement an affordable senior housing advocacy agenda for Illinois.	$25,000
Total Housing Action Illinois (1 item)				$25,000
Housing Opportunities and Maintenance for the Elderly				
2008079	**Housing Opportunities and Maintenance for the Elderly** 1419 West Carroll Avenue, FL 2 Chicago, Illinois 60607-1149	509(a)(1)	Three-year grant to implement H O M.E 's first major gift campaign to meet the growing demand for their senior services	$36,274
2008079	**Housing Opportunities and Maintenance for the Elderly** 1419 West Carroll Avenue, FL 2 Chicago, Illinois 60607-1149	509(a)(1)	Three-year grant to implement H O M E 's first major gift campaign to meet the growing demand for their senior services	$41,989
Total Housing Opportunities and Maintenance for the Elderly (2 items)				$78,263
IDEAS Institute				
2009012	**IDEAS Institute** 8055 Chardon Road Kirtland, Ohio 44094	509(a)(1)	Six-month grant to test the effect of low-cost environmental interventions and modifications on the communication skills and quality of life of nursing home residents with dementia by using a toolkit with speech-language pathologists that includes,assessment, a resource guide, and measurement tools	$25,584
Total IDEAS Institute (1 item)				$25,584
Independent Living Community Services, Inc.				
2009218	**Independent Living Community Services, Inc.** 5201 Blue Lagoon Drive, #270 Miami, Florida 33126	509(a)(2)	One-year grant to implement A Matter of Balance, an evidence-based falls prevention program, for 300 older adults who are at risk for falling.	$28,000
Total Independent Living Community Services, Inc (1 item)				$28,000

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Ingleside Whitfield United Methodist Church				
2008199	**Ingleside Whitfield United Methodist Church** 929 E 76th Street Chicago, Illinois 60619	509(a)(1)	An 18-month grant to construct two accessible restrooms and install interior ramps	$30,000
Total Ingleside Whitfield United Methodist Church (1 item)				$30,000
Interfaith Refugee & Immigration Ministries				
2008266	**Interfaith Refugee & Immigration Ministries** 4753 North Broadway Suite 401 Chicago, Illinois 60640	509(a)(1)	Three-year grant to develop services for two new immigrant populations of senior refugees and add a mentoring component to the program.	$50,000
Total Interfaith Refugee & Immigration Ministries (1 item)				$50,000
Iowa Citizens for Community Improvement				
2008139	**Iowa Citizens for Community Improvement** 2001 Forest Avenue Des Moines, Iowa 50311	509(a)(1)	Two-year grant for the Rural Seniors Environmental Health Justice Project, which empowers rural seniors to protect their property from the negative impact of factory farms and improve the quality of life for all Iowans at risk due to toxins in the soil, air, and water emitted by growing numbers of large-scale livestock facilities.	$50,000
Total Iowa Citizens for Community Improvement (1 item)				$50,000
ITN Bluegrass Inc.				
2008264	**ITN Bluegrass Inc.** 1206 N Limestone St. Lexington, Kentucky 40505	509(a)(1)	Second-year support to continue implementation of a new affiliate of the Independent Transportation Network, a program in which older or visually-impaired persons needing rides can call in 24/7	$20,000
2008264	**ITN Bluegrass Inc.** 1206 N Limestone St Lexington, Kentucky 40505	509(a)(1)	Second-year support to continue implementation of a new affiliate of the Independent Transportation Network, a program in which older or visually-impaired persons needing rides can call in 24/7.	$20,000
Total ITN Bluegrass Inc (2 items)				$40,000

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Japanese American Service Committee				
2009124	**Japanese American Service Committee** 4427 North Clark Chicago, Illinois 60640	509(a)(2)	One-year grant to increase the organization's board development capacity by implementing plans for enhanced board recruitment, training, and engagement in order to create a more effective governing and fundraising board involved in oversight and stewardship	$24,000
Total Japanese American Service Committee (1 item)				$24,000
Jesuit High School				
2009003	**Jesuit High School** 4133 Banks Street New Orleans, Louisiana 70119	509(a)(1)	Grant honoring Trustee Emeritus Santos to develop, and/or maintain projects, programs, courses, lectures, expenses, etc that are related to student activities in the fields of gerontology and/or geriatrics	$75,000
Total Jesuit High School (1 item)				$75,000
Jewish Family and Children's Services of Sarasota-Manatee				
2008245	**Jewish Family and Children's Services of Sarasota-Manatee** 2688 Fruitville Rd Sarasota, Florida 34237	509(a)(1)	Two-year grant to launch two aging- in-place programs for low-income seniors in an underserved area of southern Sarasota County	$25,094
2008245	**Jewish Family and Children's Services of Sarasota-Manatee** 2688 Fruitville Rd. Sarasota, Florida 34237	509(a)(1)	Two-year grant to launch two aging- in-place programs for low-income seniors in an underserved area of southern Sarasota County	$25,094
Total Jewish Family and Children's Services of Sarasota-Manatee (2 items)				$50,188
Johnnie B. Byrd, Sr. Alzheimer's Center & Research Institute				
2005212	**Johnnie B. Byrd, Sr. Alzheimer's Center & Research Institute** 4001 E Fletcher Ave. Tampa, Florida 33613-4808	509(a)(1)	Three-year grant to determine if booster sessions of cognitive rehabilitation, in conjunction with medication, can decrease the rate of cognitive and functional decline in patients with Alzheimer's	-$436
Total Johnnie B Byrd, Sr Alzheimer's Center & Research Institute (1 item)				-$436

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Laity in Support of Retired Priests, Inc.				
2009006	**Laity in Support of Retired Priests, Inc.** 4140 Bayhead Drive, Suite 206 Bonita Springs, Florida 34134	509(a)(1)	Eighteen-month grant to define a model retirement program for U S Diocesan priests	$25,000
Total Laity in Support of Retired Priests, Inc (1 item)				$25,000
Lincoln Park Village, Inc.				
2009114	**Lincoln Park Village, Inc.** 2502 N. Clark St. Chicago, Illinois 60614	509(a)(2)	One-year grant to create a membership organization that offers programs and services to enable members to stay in their homes as they age	$15,000
Total Lincoln Park Village, Inc (1 item)				$15,000
Little Brothers-Friends of the Elderly				
2006268	**Little Brothers-Friends of the Elderly** 28 E Jackson Boulevard, Suite 405 Chicago, Illinois 60604	509(a)(1)	Three-year grant in support of a full-time development director	-$12,466
2006268	**Little Brothers-Friends of the Elderly** 28 E. Jackson Boulevard, Suite 405 Chicago, Illinois 60604	509(a)(1)	Three-year grant in support of a full-time development director.	$30,000
Total Little Brothers-Friends of the Elderly (2 items)				$17,534
Little Sisters of the Poor, St. Joseph's Home for the Elderly				
2009084	**Little Sisters of the Poor, St. Joseph's Home for the Elderly** 80 West Northwest Highway Palatine, Illinois 60067	509(a)(1)	One-year grant to update life-safety systems at a skilled nursing facility	$50,000
Total Little Sisters of the Poor, St Joseph's Home for the Elderly (1 item)				$50,000
Living Faith United Methodist Church				
2008202	**Living Faith United Methodist Church** 414 McAree Waukegan, Illinois 60085	509(a)(1)	An 18-month grant to renovate the entrance for accessibility and install an elevator	$30,000

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Total Living Faith United Methodist Church (1 item)				$30,000
Long Term Care Community Coalition				
2009102	**Long Term Care Community Coalition** 242 West 30th Street, Suite 306 New York, New York 10001-4903	509(a)(1)	One-year grant to replicate, in Georgia and Pennsylvania, an advocacy effort that improved New York State's use of Civil Monetary Penalties (CMPs) to enhance nursing home quality	$34,925
Total Long Term Care Community Coalition (1 item)				$34,925
Loyola University Medical Center				
2009126	**Loyola University Medical Center** 2160 South First Avenue Maywood, Illinois 60153	509(a)(1)	One-year grant to develop, implement, and evaluate an online program to educate nurse practitioners that prepares them to direct and deliver high-quality palliative care for nursing home residents and their families.	$38,248
Total Loyola University Medical Center (1 item)				$38,248
Lutheran Services in Iowa, Inc.				
2009131	**Lutheran Services in Iowa, Inc.** 3116 University Avenue Des Moines, Iowa 50311	509(a)(2)	One-year grant to purchase a training program series for a Home Health Care Program, which includes DVDs and a curricullum that will be used for in-service education sessions for home health aides	$2,300
Total Lutheran Services in Iowa, Inc (1 item)				$2,300
Lyric Opera of Chicago				
2009079	**Lyric Opera of Chicago** 20 North Wacker Drive Chicago, Illinois 60606	509(a)(1)	In partial support of the Lyric Opera's October 2009 Senior Matinee, "Faust."	$15,000
Total Lyric Opera of Chicago (1 item)				$15,000
Maple Park United Methodist Church				
2008197	**Maple Park United Methodist Church** 11705 South Elizabeth Street Chicago, Illinois 60643	509(a)(1)	An 18-month grant to renovate the church entrance for accessibility	$18.779
Total Maple Park United Methodist Church (1 item)				$18,779

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Marianjoy Rehabilitation Hospital				
2008151	**Marianjoy Rehabilitation Hospital** 26W171 Roosevelt Road Wheaton, Illinois 60187	509(a)(1)	Two-year grant to research the rehabilitation outcomes for stroke survivors who receive an innovative regimen described as "Weight Supported Pre-Gait Balance Therapy "	$50,696
Total Marianjoy Rehabilitation Hospital (1 item)				$50,696
Medic Alert Foundation International				
2001366	**Medic Alert Foundation International** 2323 Colorado Avenue Turlock, California 95380	509(a)(2)	Eighteen-month grant to update, expand and publish a new Emergency Medical Services Teaching Manual, Geriatic Emergencies. See long notes below (updated 2/26/09)	-$5,297
Total Medic Alert Foundation International (1 item)				-$5,297
Metropolitan Tenants Organization				
2008064	**Metropolitan Tenants Organization** 2150 S Canalport, Suite 2B2 Chicago, Illinois 60608	509(a)(1)	Two-year grant to help seniors living in HUD-subsidized buildings advocate for improvements	$35,000
Total Metropolitan Tenants Organization (1 item)				$35,000
Miami University Scripps Gerontology Center				
2009022	**Miami University Scripps Gerontology Center** Upram Hall, Room 396 Oxford, Ohio 45056-1879	509(a)(1)	Second-year support to implement effective distance learning courses, improving incontinence care and mealtime assistance, teaching nursing home staff and supervisors interventions for nursing home residents	$34,928
Total Miami University Scripps Gerontology Center (1 item)				$34,928
Naperville Elderly Homes, Inc.				
2009200	**Naperville Elderly Homes, Inc.** 310 West Martin Avenue Naperville, Illinois 60540	509(a)(2)	One-year grant toward purchase of wheel-chair accessible bus for meeting shopping, social, and spiritual needs of residents in low-income senior housing	$20,000
Total Naperville Elderly Homes, Inc (1 item)				$20,000

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
National Able Network				
2007246	**National Able Network** 180 N. Wabash Avenue, Suite 600 Chicago, Illinois 60601	509(a)(1)	Two-year grant to engage in, and begin implementation of, a formal strategic plan to meet the increasing needs of older workers more effectively	$25,575
Total National Able Network (1 item)				$25,575
National Academy of Social Insurance				
2007281	**National Academy of Social Insurance** 1776 Massachusetts Avenue, NW - Suite 615 Washington, DC 20036-1904	509(a)(1)	Three-year grant to continue an internship and mentoring program to develop young research leaders, focusing on long-term care and disability issues as key components in aging policies	$36,701
Total National Academy of Social Insurance (1 item)				$36,701
National Alliance for Caregiving				
2009008	**National Alliance for Caregiving** 4720 Montgomery Lane, Suite 205 Bethesda, Maryland 20814	509(a)(2)	One-year grant to support attendance of caregiving coalition members to the 2009 meeting and to permit ongoing training of coalitions during the subsequent year.	$15,000
Total National Alliance for Caregiving (1 item)				$15,000
National Center for State Courts				
2008056	**National Center for State Courts** 300 Newport Avenue Williamsburg, Virginia 23185-4147	509(a)(1)	Two-year grant to launch the Center for Elders and the Courts to serve as the primary resource for judiciary and court management on issues related to aging.	$38,276
2008056	**National Center for State Courts** 300 Newport Avenue Williamsburg, Virginia 23185-4147	509(a)(1)	Two-year grant to launch the Center for Elders and the Courts to serve as the primary resource for judiciary and court management on issues related to aging	$41,167
Total National Center for State Courts (2 items)				$79,443
National Citizens Coalition for Nursing Home Reform (NCCNHR)				
2008084	**National Citizens Coalition for Nursing Home Reform (NCCNHR)** 1828 L Street, N W , Suite 801 Washington, DC 20036	509(a)(1)	One year support to enable Citizen Advocacy Groups to develop the organizational capacity they need to become more effective advocates on long-term care issues	$62,613

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Total National Citizens Coalition for Nursing Home Reform (NCCNHR) (1 item)				$62,613
National Committee for Responsive Philanthropy				
2009060	**National Committee for Responsive Philanthropy** 1331 H Street, N.W , Suite 200 Washington, DC 20005	509(a)(2)	Program support for 2009	$15,000
Total National Committee for Responsive Philanthropy (1 item)				$15,000
National Consumer Law Center				
2008040	**National Consumer Law Center** 7 Winthrop Square, 4th Floor Boston, Massachusetts 02110-1245	509(a)(1)	One-year grant for advocacy to stop creditors and banks from improperly freezing or taking exempt federal pension payments from the bank accounts of low-income seniors with debt problems	$55,000
Total National Consumer Law Center (1 item)				$55,000
National Council on Aging, Inc.				
2008073	**National Council on Aging, Inc.** 1901 L Street, N W., 4th Floor Washington, DC 20036	509(a)(2)	Three-year grant to facilitate and accelerate the large-scale replication of two effective evidence-based programs for older adults (one on fall prevention and one to treat depression) and to evaluate an innovative tool for helping agencies assess their readiness for and ability to implement new programs.	$62,852
2008073	**National Council on Aging, Inc.** 1901 L Street, N.W , 4th Floor Washington, DC 20036	509(a)(2)	Three-year grant to facilitate and accelerate the large-scale replication of two effective evidence-based programs for older adults (one on fall prevention and one to treat depression) and to evaluate an innovative tool for helping agencies assess their readiness for and ability to implement new programs	$36,612
Total National Council on Aging, Inc (2 items)				$99,464

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
National Foundation of Dentistry for the Handicapped				
2007084	**National Foundation of Dentistry for the Handicapped** 1800 15th Street, Unit 100 Denver, Colorado 80202	509(a)(2)	Two-year grant for advocacy to help expand and institutionalize the Donated Dental Services project, an important national resource for needy elderly, the disabled, and medically compromised people	$37,500
Total National Foundation of Dentistry for the Handicapped (1 item)				$37,500
National Religious Retirement Office				
2008025	**National Religious Retirement Office** 3211 Fourth Street, NE Washington, DC 20017-1194	509(a)(1)	Eighteen-month grant to train 90 religious institutes in the goals and methods for implementing person-centered long-term care for frail elderly religious	$64,517
2008025	**National Religious Retirement Office** 3211 Fourth Street, NE Washington, DC 20017-1194	509(a)(1)	Eighteen-month grant to train 90 religious institutes in the goals and methods for implementing person-centered long-term care for frail elderly religious	$46,307
Total National Religious Retirement Office (2 items)				$110,824
National Senior Citizens Law Center				
2009030	**National Senior Citizens Law Center** 1444 Eye Street, NW, 11th Floor Washington, DC 20005	509(a)(1)	One-year grant for advocacy to protect low-income elderly from limitations in eligiblity or benefits under Medicaid as states rework budgets to reduce their long-term care expenditures.	$49,239
Total National Senior Citizens Law Center (1 item)				$49,239
Northern Illinois Food Bank				
2008235	**Northern Illinois Food Bank** 600 Industrial Drive St. Charles, Illinois 60174-2484	509(a)(1)	One-year grant to establish a new program designed specifically to serve older adults who are unable to access the traditional food distribution sites	$50,000
2009183	**Northern Illinois Food Bank** 600 Industrial Drive St. Charles, Illinois 60174-2484	509(a)(1)	One-year grant for monthly food deliveries to 200 low-income elderly.	$15,000
Total Northern Illinois Food Bank (2 items)				$65,000

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Northwest Side Housing Center				
2007253	**Northwest Side Housing Center** 5007 W. Addison Street Chicago, Illinois 60641	509(a)(1)	Three-year grant to improve marketing and resource development and purchase new technology	$27,000
2009024	**Northwest Side Housing Center** 5007 W Addison Street Chicago, Illinois 60641	509(a)(1)	One-year grant to create a task force for establishing and implementing a policy and protocol to secure and maintain vacant homes in the community to protect older adults	$15,000
Total Northwest Side Housing Center (2 items)				$42,000
Organization of New City				
2008230	**Organization of New City** 5411 S. Carpenter Avenue Chicago, Illinois 60609	509(a)(1)	Three-year grant to help low-income elderly families cope with safety, utility, and housing issues	$50,000
Total Organization of New City (1 item)				$50,000
Our Lady of Peace Church				
2009160	**Our Lady of Peace Church** 7851 South Jeffery Boulevard Chicago, Illinois 60649	509(a)(1)	An 18-month grant to install a platform lift that will provide access between the sanctuary and lower-level meeting rooms.	$19,650
Total Our Lady of Peace Church (1 item)				$19,650
Partners for Sacred Places				
2008097	**Partners for Sacred Places** 1700 Sansom Street, Tenth Floor Philadelphia, Pennsylvania 19103	509(a)(1)	Two-year grant for start-up of a Chicago regional program that will build the capacity of local religious congregations to sustain their buildings and services for the elderly and other populations in need	$37,500
2008097	**Partners for Sacred Places** 1700 Sansom Street, Tenth Floor Philadelphia, Pennsylvania 19103	509(a)(1)	Two-year grant for start-up of a Chicago regional program that will build the capacity of local religious congregations to sustain their buildings and services for the elderly and other populations in need	$37,500
Total Partners for Sacred Places (2 items)				$75,000

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
PEER Services, Inc.				
2009029	**PEER Services, Inc.** 906 Davis Street Evanston, Illinois 60201	509(a)(1)	One-year grant to expand substance abuse treatment program for older adults by adding a full-time Older Adult Specialist to serve more clients, enhance current community partnerships, and expand the base of partners.	$35,000
Total PEER Services, Inc (1 item)				$35,000
Pension Rights Center				
2009223	**Pension Rights Center** 1350 Connecticut Avenue, NW, Suite 206 Washington, DC 20036-1739	509(a)(1)	Six-month grant in support of a conference introducing guidelines on principles for a new universal, secure, and adequate retirement income system	$1,000
Total Pension Rights Center (1 item)				$1,000
Pioneer Network in Culture Change				
2009068	**Pioneer Network in Culture Change** P O Box 18648 Rochester, New York 14618	509(a)(2)	One-year grant to develop, demonstrate, and disseminate a low-cost replicable process for implementing incremental environmental changes to help nursing homes move toward person-centered care	$49,456
Total Pioneer Network in Culture Change (1 item)				$49,456
Planning for Elders in the Central City				
2008018	**Planning for Elders in the Central City** 965 Mission Street, Suite 550 San Francisco, California 94103	509(a)(1)	Three-year grant for education and advocacy to promote safer hospital-to-home transitions for older adults.	$35,052
2008018	**Planning for Elders in the Central City** 965 Mission Street, Suite 550 San Francisco, California 94103	509(a)(1)	Three-year grant for education and advocacy to promote safer hospital-to-home transitions for older adults	$35,052
Total Planning for Elders in the Central City (2 items)				$70,104

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Protestants for the Common Good				
2008162	**Protestants for the Common Good** 77 W Washington St , Suite 1124 Chicago, Illinois 60602	509(a)(1)	Second-year funding for the Academy for the Common Good to engage older adults in faith-based education, training, and advocacy to work for social justice	$60,000
Total Protestants for the Common Good (1 item)				$60,000
Public Action Foundation				
2009009	**Public Action Foundation** 27 E. Monroe - Suite 1100 Chicago, Illinois 60603	509(a)(1)	One-year grant to continue a statewide Medicare prescription drug advocacy and education campaign for service providers, advocates, and consumers.	$25,000
Total Public Action Foundation (1 item)				$25,000
Reconstructionist Rabbinical College				
2006265	**Reconstructionist Rabbinical College** 1299 Church Road Wyncote, Pennsylvania 19095-1898	509(a)(1)	Three-year grant to develop a model for infusing an awareness of aging issues into seminary training and creating a replicable approach for seminaries of diverse faiths.	$29,468
2006265	**Reconstructionist Rabbinical College** 1299 Church Road Wyncote, Pennsylvania 19095-1898	509(a)(1)	Three-year grant to develop a model for infusing an awareness of aging issues into seminary training and creating a replicable approach for seminaries of diverse faiths	$29,467
Total Reconstructionist Rabbinical College (2 items)				$58,935
Research Triangle Institute				
2008165	**Research Triangle Institute** 3040 Cornwallis Road PO Box 12194 Research Triangle Park, North Carolina 27709-2194	509(a)(3)	Two-year grant for research using new data from the National Assistant Survey to examine· 1) the link between workforce variables and patient care outcomes, and 2) characteristics of the immigrant workforce in institutional long-term care (LTC) settings	$44,316
2008165	**Research Triangle Institute** 3040 Cornwallis Road PO Box 12194 Research Triangle Park, North Carolina 27709-2194	509(a)(3)	Two-year grant for research using new data from the National Assistant Survey to examine. 1) the link between workforce variables and patient care outcomes, and 2) characteristics of the immigrant workforce in institutional long-term care (LTC) settings	$55,668
Total Research Triangle Institute (2 items)				$99,984

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Rutgers Brunswick				
2007152	**Rutgers Brunswick** Institute for Health, Health Care Policy, and Aging Research 30 College Avenue New Brunswick, New Jersey 08901-1283	509(a)(1)	Two-year grant to describe patterns of prescribing antipsychotic drugs in nursing homes in five states, using MDS, OSCAR and Medicare Claims data	$62,183
Total Rutgers Brunswick (1 item)				$62,183
Ruth Rales Jewish Family Service				
2009172	**Ruth Rales Jewish Family Service** 21300 Ruth & Baron Coleman Boulevard Boca Raton, Florida 33428-1757	509(a)(1)	Six-month grant to support ten new clients in a program of home-based services to prevent nursing home placement for older Holocaust Survivors	$24,592
Total Ruth Rales Jewish Family Service (1 item)				$24,592
Ryegate Commons				
2008279	**Ryegate Commons** 1417 Joe's Brook Road St. Johnsbury, Vermont 05819	509(a)(1)	Six-month grant for predevelopment costs to study the feasibility of a rural model for affordable, senior co-housing	$19,138
Total Ryegate Commons (1 item)				$19,138
Saint Alexander Church				
2008193	**Saint Alexander Church** 300 S. Cornell Avenue Chicago, Illinois 60181	509(a)(1)	A 12-month grant to install automatic door openers.	$4,256
Total Saint Alexander Church (1 item)				$4,256
Saint Catherine of Siena-Saint Lucy Parish				
2009159	**Saint Catherine of Siena-Saint Lucy Parish** 38 North Austin Boulevard Oak Park, Illinois 60302	509(a)(1)	An 18-month grant to construct a concrete ramp that will create an accessible entrance	$30,000
Total Saint Catherine of Siena-Saint Lucy Parish (1 item)				$30,000

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Saint Hedwig Catholic Church				
2009153	**Saint Hedwig Catholic Church** 2226 N Hoyne Avenue Chicago, Illinois 60647	509(a)(1)	An 18-month grant to install a ramp at one entrance of the church and install an exterior vertical platform lift at the Pastoral Center	$30,000
Total Saint Hedwig Catholic Church (1 item)				$30,000
Saint John de la Salle Catholic Church				
2009161	**Saint John de la Salle Catholic Church** 10205 S. Martin Luther King Drive Chicago, Illinois 60628	509(a)(1)	An 18-month grant to install a platform lift that will provide access to all three levels of the building	$7,766
Total Saint John de la Salle Catholic Church (1 item)				$7,766
Saint John Evangelical Lutheran Church				
2009094	**Saint John Evangelical Lutheran Church** 305 Circle Avenue Forest Park, Illinois 60130	509(a)(1)	An 18-month grant to install an enclosed lift for access from the sanctuary to the second floor of the parish hall	$30,000
Total Saint John Evangelical Lutheran Church (1 item)				$30,000
Saint John the Baptist Greek Orthodox Church				
2008196	**Saint John the Baptist Greek Orthodox Church** 2350 E Dempster Street Des Plaines, Illinois 60016	509(a)(1)	An 18-month grant to construct a ramp	$14,000
Total Saint John the Baptist Greek Orthodox Church (1 item)				$14,000
Saint Josaphat Parish				
2008200	**Saint Josaphat Parish** 2311 N Southport Chicago, Illinois 60614	509(a)(1)	An 18-month grant to renovate the church entrance for accessibility	$13,172
Total Saint Josaphat Parish (1 item)				$13,172

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Saint Luke Church of God in Christ				
2009166	**Saint Luke Church of God in Christ** 914 N. Orleans Street Chicago, Illinois 60610		An 18-month grant to upgrade an elevator that will meet revised code requirements and provide access to the lower level multi-purpose room.	$26,000
Total Saint Luke Church of God in Christ (1 item)				$26,000
Saint Mark United Church of Christ				
2009158	**Saint Mark United Church of Christ** 312 Chicago Road Chicago Heights, Illinois 60411	509(a)(1)	An 18-month grant to remove the existing hazardous parking lot and replace it with one that is safe and accessible	$13,000
Total Saint Mark United Church of Christ (1 item)				$13,000
Saint Nicholas Church				
2007200	**Saint Nicholas Church** 806 Ridge Avenue Evanston, Illinois 60202	509(a)(1)	An 18-month grant to construct a single occupancy accessible restroom	-$6,969
Total Saint Nicholas Church (1 item)				-$6,969
Saint Odilo Church				
2009142	**Saint Odilo Church** 2244 East Avenue Berwyn, Illinois 60402	509(a)(1)	An 18-month grant to install a platform lift that will provide access to the social hall used for most events.	$9,835
Total Saint Odilo Church (1 item)				$9,835
Salem United Church of Christ				
2009091	**Salem United Church of Christ** 9717 South Kostner Avenue Oak Lawn, Illinois 60453	509(a)(1)	An 18-month grant to construct a new unisex, single occupancy restroom for accessibility	$11,625
Total Salem United Church of Christ (1 item)				$11,625

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Sargent Shriver National Center on Poverty Law, Inc.				
2007160	**Sargent Shriver National Center on Poverty Law, Inc.** 50 E Washington Street, Suite 500 Chicago, Illinois 60602	509(a)(1)	Two-year grant for a collaborative effort using tenant advocacy and legal tools to preserve existing affordable senior housing units, and to promote state policies to preserve low-income housing for seniors into the future	$42,500
2009108	**Sargent Shriver National Center on Poverty Law, Inc.** 50 E Washington Street, Suite 500 Chicago, Illinois 60602	509(a)(1)	Six-month grant to continue advocacy to preserve low-income senior housing and protect the rights of seniors being relocated from closed public housing buildings	$35,000
Total Sargent Shriver National Center on Poverty Law, Inc (2 items)				$77,500
Senior Friendship Centers				
2009004	**Senior Friendship Centers** 1888 Brother Geenen Way Sarasota, Florida 34236	509(a)(1)	One-year in continued support to transform traditional congregate nutrition sites into "Community Engagement Centers" by using results from an asset-based community assessment to link older adults to community resources and volunteer opportunities	$54,000
Total Senior Friendship Centers (1 item)				$54,000
Senior Resource Alliance				
2007312	**Senior Resource Alliance** Area Agency on Aging of Central Florida 988 Woodcock Road, Suite 200 Orlando, Florida 32803	509(a)(1)	Eighteen-month grant to identify nursing homes in Florida that are undergoing culture change, create a database for homes to share their strategies and challenges, and work with state surveyors to address regulatory barriers	$36,909
Total Senior Resource Alliance (1 item)				$36,909
Services for Adults Staying in Their Homes (SASI)				
2008252	**Services for Adults Staying in Their Homes (SASI)** 1123 Emerson, #200 Evanston, Illinois 60201	509(a)(1)	Two-year grant to build organizational capacity in the areas of marketing and resource development	$26,725

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
2008252	**Services for Adults Staying in Their Homes (SASI)** 1123 Emerson, #200 Evanston, Illinois 60201	509(a)(1)	Two-year grant to build organizational capacity in the areas of marketing and resource development.	$26,725
Total Services for Adults Staying in Their Homes (SASI) (2 items)				$53,450
South Grand Senior Ministry				
2007017	**South Grand Senior Ministry** 2000 South 11th Street St Louis, Missouri 63104	509(a)(1)	Two-year grant to expand services to a broader group of low-income elderly in the metropolitan St Louis area	$36,500
Total South Grand Senior Ministry (1 item)				$36,500
Terra Nova Films				
2009140	**Terra Nova Films** 9848 South Winchester Avenue Chicago, Illinois 60643	509(a)(1)	One-year grant to expand and enhance a new video-based website for family caregivers, by adding a tab with a menu of positively-oriented films and videos for family caregivers, and a version of the entire website in Spanish.	$37,586
Total Terra Nova Films (1 item)				$37,586
The Chicago Lighthouse for People Who Are Blind or Visually Impaired				
2007040	**The Chicago Lighthouse for People Who Are Blind or Visually Impaired** 1850 West Roosevelt Road Chicago, Illinois 60608	509(a)(2)	Three-year grant to update broadcasting equipment and expand the geographic area served to northwestern Indiana and the southwest Chicago suburban area	$50,000
Total The Chicago Lighthouse for People Who Are Blind or Visually Impaired (1 item)				$50,000
The Foundation Center				
2009035	**The Foundation Center** 79 Fifth Avenue New York, New York 10003	509(a)(1)	Program support for 2009	$12,000
Total The Foundation Center (1 item)				$12,000

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
The Generations Project				
2008285	**The Generations Project** One North Capitol Avenue, Suite 1025 Indianapolis, Indiana 46204	509(a)(1)	Third-year support of public education and advocacy in Indiana to continue implementation of a re-balanced long-term care system.	$42,500
Total The Generations Project (1 item)				$42,500
The University of Georgia Research Foundation, Inc.				
2007045	**The University of Georgia Research Foundation, Inc.** 621 Boyd Graduate Studies Research Center Athens, Georgia 30602-7411	509(a)(1)	Three-year grant to complete a longitudinal implementation evaluation of the ElderSpirit community, the first elder co-housing experiment in the country	$31,547
Total The University of Georgia Research Foundation, Inc (1 item)				$31,547
Thresholds				
2008044	**Thresholds** 4101 N Ravenswood Avenue Chicago, Illinois 60613	509(a)(1)	Eighteen-month grant for pilot research on an integrated, team-delivered mental and physical healthcare intervention for older adults with severe and persistent mental illness	$21,334
2009195	**Thresholds** 4101 N. Ravenswood Avenue Chicago, Illinois 60613	509(a)(1)	Second grant to continue research over 14 months on an integrated, team-delivered mental and physical healthcare intervention for older adults with severe and persistent mental illness	$31,185
Total Thresholds (2 items)				$52,519
Touchette and Kenneth Hall Regional Hospitals				
2009111	**Touchette and Kenneth Hall Regional Hospitals** 129 North 8th Street East St Louis, Illinois 62201	509(a)(1)	One-year grant to expand Senior IQ Program that provides case management, information and referral, counseling and assistance for East St. Louis low-income elderly to assist them in obtaining health care and other benefits.	$35,000
Total Touchette and Kenneth Hall Regional Hospitals (1 item)				$35,000

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Treasure Coast Hospice				
2008135	**Treasure Coast Hospice** 1201 S.E Indian Street Stuart, Florida 34997	509(a)(1)	Two-year grant to establish, in collaboration with community hospitals, a regional Palliative Care program for seniors with chronic illnesses	$59,500
2008135	**Treasure Coast Hospice** 1201 S E Indian Street Stuart, Florida 34997	509(a)(1)	Two-year grant to establish, in collaboration with community hospitals, a regional Palliative Care program for seniors with chronic illnesses.	$61,500
Total Treasure Coast Hospice (2 items)				$121,000
Unity Temple Unitarian Universalist Congregation				
2008105	**Unity Temple Unitarian Universalist Congregation** 875 Lake Street Oak Park, Illinois 60301	509(a)(1)	An 18-month grant for a wheel-chair lift and hand rails	$8,678
Total Unity Temple Unitarian Universalist Congregation (1 item)				$8,678
University of California, Berkeley				
2005325	**University of California, Berkeley** 336 Sprout Hall Berkeley, California 94720-7360	509(a)(1)	Three-year grant in support of research on the transition from middle-age to old age, especially with regard to psychological well-being in early old age.	$17,807
Total University of California, Berkeley (1 item)				$17,807
University of California, Los Angeles				
2007037	**University of California, Los Angeles** Los Angeles, California 90095-1406	509(a)(1)	Two-year grant to study the prevalence and risk factors for elder mistreatment in Residential Care Facilities in Arizona.	$66,616
Total University of California, Los Angeles (1 item)				$66,616
University of Illinois at Chicago				
2008176	**University of Illinois at Chicago** Office of the Chancellor 2833 University Hall 601 South Morgan Chicago, Illinois 60607-7128	509(a)(1)	Two-year grant to study factors associated with successful implementation and maintenance of Chronic Disease Self Management (CDSMP) program replications in Illinois, and how well participants continue the learned health management behaviors over several months	$48,865

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
2008176	**University of Illinois at Chicago** Office of the Chancellor 2833 University Hall 601 South Morgan Chicago, Illinois 60607-7128	509(a)(1)	Two-year grant to study factors associated with successful implementation and maintenance of Chronic Disease Self Management (CDSMP) program replications in Illinois, and how well participants continue the learned health management behaviors over several months	$49,694
Total University of Illinois at Chicago (2 items)				$98,559
University of Iowa				
2007067	**University of Iowa** 100 Gilmore Hall Iowa City, Iowa 52242	509(a)(1)	Thirty-month grant to develop and implement an evidence-based training program to teach all professionals in nursing homes how to provide meaningful activity-based care for older persons with dementia	$24,667
2007067	**University of Iowa** 100 Gilmore Hall Iowa City, Iowa 52242	509(a)(1)	Thirty-month grant to develop and implement an evidence-based training program to teach all professionals in nursing homes how to provide meaningful activity-based care for older persons with dementia.	$25,000
Total University of Iowa (2 items)				$49,667
University of Kentucky Research Foundation				
2005083	**University of Kentucky Research Foundation** 201 Kinkead Hall Lexington, Kentucky 40506-0057	509(a)(3)	A fifteen-month grant for the final phase of the national public guardianship study, examining six additional jurisdictions.	-$16,747
Total University of Kentucky Research Foundation (1 item)				-$16,747
University of Miami				
2008055	**University of Miami** Office of the President PO Box 248006 Coral Gables, Florida 33124-4600	509(a)(1)	Two-year grant to implement, evaluate, and disseminate a multi-component psychosocial intervention designed to reduce adverse health effects, enhance work performance, and improve quality of life of working caregivers of older adults	$52,933
2008055	**University of Miami** Office of the President PO Box 248006 Coral Gables, Florida 33124-4600	509(a)(1)	Two-year grant to implement, evaluate, and disseminate a multi-component psychosocial intervention designed to reduce adverse health effects, enhance work performance, and improve quality of life of working caregivers of older adults.	$55,529

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Total University of Miami (2 items)				$108,462
UWM Foundation, Inc.				
2009184	**UWM Foundation, Inc.** 3230 E. Kenwood Blvd. Milwaukee, Wisconsin 53211	509(a)(1)	One-year grant to disseminate broadly the TimeSlips program, which provides person-centerd engagement for persons with dementia and Alzheimer's Disease living in nursing homes or recieving community-based care, by developing an online tool that adapts this proven model	$19,500
Total UWM Foundation, Inc (1 item)				$19,500
Washington University in St. Louis				
2008271	**Washington University in St. Louis** Campus Box 1196 One Brookings Drive St. Louis, Missouri 63110-4899	509(a)(1)	Two-year grant to determine the impact of home modifications on physical activity and community participation of elderly with chronic diseases and mobility impairments	$31,634
2008271	**Washington University in St. Louis** Campus Box 1196 One Brookings Drive St Louis, Missouri 63110-4899	509(a)(1)	Two-year grant to determine the impact of home modifications on physical activity and community participation of elderly with chronic diseases and mobility impairments	$31,633
Total Washington University in St Louis (2 items)				$63,267
Wesley Village Senior Living Retirement Community				
2008234	**Wesley Village Senior Living Retirement Community** 1125 Lexington Road Wilmore, Kentucky 40390	509(a)(2)	One-year grant for pre-development plans to develop the "small house" model of care for residents with dementia	$37,500
2008234	**Wesley Village Senior Living Retirement Community** 1125 Lexington Road Wilmore, Kentucky 40390	509(a)(2)	One-year grant for pre-development plans to develop the "small house" model of care for residents with dementia	$37,500
Total Wesley Village Senior Living Retirement Community (2 items)				$75,000

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Wisconsin Illinois Senior Housing				
2009081	**Wisconsin Illinois Senior Housing** 6651 N. Washtenaw Chicago, Illinois 60645	509(a)(2)	One-year grant to purchase three therapeutic computer systems for enhancing person-centered activities and therapy for low-income seniors in three midwestern nursing homes	$10,000
Total Wisconsin Illinois Senior Housing (1 item)				$10,000
Wisconsin Partnership for Housing Development, Inc.				
2008144	**Wisconsin Partnership for Housing Development, Inc.** 121 S Pinckney Street, Suite 200 Madison, Wisconsin 53703	509(a)(1)	One-year grant to pilot an initiative to preserve the affordability and quality of housing for older adults and to bring services to residents who need assistance to continue to live independently	$37,500
Total Wisconsin Partnership for Housing Development, Inc (1 item)				$37,500
Women's Health Foundation				
2009052	**Women's Health Foundation** 632 West Deming Place Chicago, Illinois 60614	509(a)(1)	One-year grant to disseminate pelvic health educational information for senior women.	$8,247
Total Women's Health Foundation (1 item)				$8,247
Grand Totals (206 items)				$6,612,372
			Plus: Grants returned during 2009	54,932
				6,667,304

RETIREMENT RESEARCH FOUNDATION
CHICAGO, ILLINOIS
FORM 990 PF
DECEMBER 31, 2009
36-2429540

MATCHING GIFTS
ATTACHMENT B
Part XV Page 11
Details to Line 3a
Pages 1 through 3

The Retirement Research Foundation
List of Matching Gifts
January through December 2009

Date	Name	Address	City	State	Zip	Amount
01/06/2009	Sisters of the Holy Family of Nazareth	310 N River Road Des Plaines, IL 60016	Des Plaines	IL	60016	7,500 00
01/14/2009	Catholic Charities-Archdiocese of Chicago	721 N LaSalle St -4th Floor Chicago, IL 60654-3503	Chicago	IL	60654-3503	3,000 00
01/14/2009	Housing Opportunities & Maintenance	for the Elderly 1419 W Carroll Avenue, FL 2 Chicago, IL 60607-1419	Chicago	IL	60607-1419	750 00
01/14/2009	St Gabriel Catholic Church	731 N Ocean Blvd Pompano Beach, FL 33062	Pompano Beach	FL	33062	150 00
01/20/2009	LIFT Foundation	711 W Monroe Chicago, IL 60661-3515	Chicago	IL	60661-3515	3,600 00
01/29/2009	St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	Evanston	IL	60202	2,700 00
02/11/2009	St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	Evanston	IL	60202	3,000 00
02/11/2009	Univ of Chicago-Graduate School Business	Booth Graduate School of Business 1427 E 60th St , Ste 120 Chicago, IL 60637	Chicago	IL	60637	600 00
02/11/2009	Wildflowers Institute	1144 Pacific Avenue San Francisco, CA 94133-4212	San Francisco	CA	94133-4212	1,500 00
02/11/2009	Self-Help Closet & Pantry of DesPlaines	600 E Algonquin Road Des Plaines, IL 60016	Des Plaines	IL	60016	900 00
02/20/2009	Southwest Suburban Center on Aging	Do Not Use See Aging Care Connections	See Aging Care Connections			750 00
02/20/2009	Pillars Community Services	333 N LaGrange Rd , Suite One LaGrange Park, IL 60526	LaGrange Park	IL	60526	7,500 00
02/20/2009	Seniors Action Service, Inc	1123 Emerson Street, Ste 200 Evanston, IL 60201	Evanston	IL	60201	1,500 00
02/20/2009	Generations Incorporated	25 Kingston St , 4th Floor Boston, MA 02111	Boston	MA	02111	450 00
02/20/2009	Play for P I N K , Inc	175 E 74th St , Suite 17B New York, NY 10021-3213	New York	NY	10021-3213	150 00
02/20/2009	Senior Home Sharing, Inc	711 E Roosevelt Rd Wheaton, IL 60187	Wheaton	IL	60187	375 00
02/25/2009	Mount Mary College	29 N Menomonee River Pkw Milwaukee, WI 53222	Milwaukee	WI	53222	3,000 00
02/25/2009	Catholic Bishop of Chicago	835 N Rush Street Chicago, IL 60611	Chicago	IL	60611	6,000 00
02/25/2009	Summit Community Task Force	6450 S 76th Avenue Summit, IL 60105-1649	Summit	IL	60105-1649	375 00
02/27/2009	Hospice Care of Southeast Florida, Inc	309 S E 18th Street Ft Lauderdale, FL 33316	Ft Lauderdale	FL	33316	195 00
03/02/2009	The Humane Society of the United States	2100 L Street NW Washington, DC 20037	Washington	DC	20037	300 00
03/02/2009	St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	Evanston	IL	60202	3,000 00
03/02/2009	Our Saviour's Lutheran Church	1234 N Arlington Hts Rd Arlington Hts , IL 60004	Arlington Hts	IL	60004	4,500 00
03/09/2009	Arab American Family Services					750 00
03/10/2009	Waterwell Productions, Inc	515 W 46th St , 2nd Floor New York, NY 10036	New York	NY	10036	300 00
03/19/2009	Rowland Hall-St Marks School	720 Guardsman Way Salt Lake City, UT 84108	Salt Lake City	UT	84108	375 00
03/26/2009	Catholic Charities-Archdiocese of Chicago	721 N LaSalle St -4th Floor Chicago, IL 60654-3503	Chicago	IL	60654-3503	3,000 00
03/26/2009	St James Cathedral	804 9th Avenue Seattle, WA 98104	Seattle	WA	98104	7,500 00
03/30/2009	God's Awesome Army Ministries	4810 El Salvador Houston, TX 77066	Houston	TX	77066	375 00
03/30/2009	Wider Opportunities for Women					375 00
04/03/2009	Sharing Connections, Inc	5111 Chase Avenue Downers Grove, IL 60515	Downers Grove	IL	60515	375 00
04/10/2009	St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	Evanston	IL	60202	3,000 00
04/10/2009	Generations Incorporated	25 Kingston St , 4th Floor Boston, MA 02111	Boston	MA	02111	3,000 00
04/16/2009	Housing Opportunities & Maintenance	for the Elderly 1419 W Carroll Avenue, FL 2 Chicago, IL 60607-1419	Chicago	IL	60607-1419	3,000 00
04/16/2009	Housing Opportunities & Maintenance	for the Elderly 1419 W Carroll Avenue, FL 2 Chicago, IL 60607-1419	Chicago	IL	60607-1419	1,500 00
04/16/2009	Sisters of St Joseph of LaGrange	1515 W Ogden Avenue LaGrange Park, IL 60526	LaGrange Park	IL	60526	300 00
04/22/2009	City at Peace	3305 8th Street, NE Studio A Washington, DC 20005	Washington	DC	20005	15,000 00
04/22/2009	Chicago Public Library Foundation	20 N Michigan Ave -Suite 204 Chicago, IL 60602	Chicago	IL	60602	300 00
05/04/2009	St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	Evanston	IL	60202	3,000 00
05/26/2009	Little Sisters of the Poor	St Joseph's Home for the Elderly 80 W Northwest Hwy Palatine, IL 60067	Palatine	IL	60067	3,000 00
05/26/2009	University of Wisconsin Foundation					300 00
06/04/2009	St Gabriel Catholic Church	731 N Ocean Blvd Pompano Beach, FL 33062	Pompano Beach	FL	33062	300 00
06/08/2009	St Raymond de Penafort Church	301 S I-Oka Mt Prospect, IL 60056	Mt Prospect	IL	60056	9,000 00
06/09/2009	St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	Evanston	IL	60202	3,000 00
06/09/2009	Lincoln Park Village, Inc	2502 N Clark Street Chicago, IL 60614	Chicago	IL	60614	4,500 00
06/16/2009	Wayland Academy	101 N University Avenue Beaver Dam, WI 53916	Beaver Dam	WI	53916	300 00
06/16/2009		101 N University Avenue Beaver Dam, WI 53916	Beaver Dam	WI	53916	(300 00)
06/18/2009	The Rev John P Smyth Standing Tall Fdn	Charitable Foundation 1100 N River Road Des Plaines, IL 60016	Des Plaines	IL	60016	300 00

The Retirement Research Foundation
List of Matching Gifts
January through December 2009

06/18/2009	Saratoga Hospital	211 Church Street Saratoga Springs, NY 12866	Saratoga Springs	NY	12866	150 00
06/25/2009	AIDS Network, Inc	600 Williamson St P O Box 731 Madison, WI 53701-0731	Madison	WI	53701-0731	300 00
06/25/2009	American Cancer Society					300 00
06/25/2009	AgeOptions Inc	1048 Lake Street, Suite 300 Oak Park, IL 60301-1102	Oak Park	IL	60301-1102	375 00
06/25/2009	Access Living	115 W Chicago Avenue Chicago, IL 60654	Chicago	IL	60654	1,800 00
07/09/2009	Seniors Action Service, Inc	1123 Emerson Street, Ste 200 Evanston, IL 60201	Evanston	IL	60201	2,250 00
07/15/2009	St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	Evanston	IL	60202	3,000 00
07/22/2009	Sisters of the Holy Family of Nazareth	310 N River Road Des Plaines, IL 60016	Des Plaines	IL	60016	7,500 00
07/29/2009	University of Notre Dame					9,000 00
07/29/2009	St John Brebeuf Church	8307 N Harlem Avenue Niles, IL 60077	Niles	IL	60077	22,500 00
08/06/2009	St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	Evanston	IL	60202	3,000 00
08/12/2009	St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	Evanston	IL	60202	1,500 00
08/13/2009	Catholic Charities-Archdiocese of Chicago	721 N LaSalle St -4th Floor Chicago, IL 60654-3503	Chicago	IL	60654-3503	3,000 00
08/20/2009	Office of Catholic Schools	Archdiocese of Chicago 835 N Rush Street Chicago, IL 60611	Chicago	IL	60611	1,500 00
08/26/2009	LIFT Foundation	711 W Monroe Chicago, IL 60661-3515	Chicago	IL	60661-3515	3,750 00
09/10/2009	St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	Evanston	IL	60202	2,550 00
09/16/2009	Susan G Komen Breast Cancer Foundation	8765 W Higgins Ave , Ste 401 Chicago, IL 60631	Chicago	IL	60631	150 00
09/16/2009	American Occupational Therapy Found	4720 Montgomery Lane Bethesda, MD 20814	Bethesda	MD	20814	3,000 00
09/16/2009	Housing Opportunities & Maintenance	for the Elderly 1419 W Carroll Avenue, FL 2 Chicago, IL 60607-1419	Chicago	IL	60607-1419	1,050 00
09/16/2009	Notre Dame High School for Girls	3115 N Mason Avenue Chicago, IL 60634	Chicago	IL	60634	3,600 00
09/16/2009	Southern Poverty Law Center	400 Washington Avenue Montgomery, AL 36104	Montgomery	AL	36104	150 00
09/30/2009	Little Brothers-Friends of the Elderly	355 N Ashland Avenue Chicago, IL 60607	Chicago	IL	60607	150 00
10/07/2009	Dystonia Medical Research Foundation					1,500 00
10/14/2009	Chicago Foundation for Women	1 E Wacker Dr , Suite 1620 Chicago, IL 60601	Chicago	IL	60601	300 00
10/20/2009	Support Our Aging Religious, Inc (SOAR!)	900 Varnum Street, NE Washington, DC 20017	Washington	DC	20017	900 00
10/26/2009	National Parks Conservation Association	1300 19th St NW, Suite 300 Washington, DC 20036	Washington	DC	20036	150 00
10/27/2009	Water org	920 Main, Suite 1800 Kansas City, MO 64105	Kansas City	MO	64105	150 00
11/06/2009	Catholic Church Extension Society of USA	150 S Wacker Drive-20th Floor Chicago, IL 60606	Chicago	IL	60606	3,600 00
11/10/2009	Saint Viator High School	1213 E Oakton Street Arlington Heights, IL 60004	Arlington Heights	IL	60004	3,600 00
11/10/2009	Olympia Waldorf School	P O Box 130 East Olympia, WA 98540	East Olympia	WA	98540	2,700 00
11/10/2009	Kolbe House	2434 S California Ave Chicago, IL 60608	Chicago	IL	60608	3,600 00
11/18/2009	The Cara Program	237 S Desplaines Chicago, IL 60661	Chicago	IL	60661	3,600 00
11/18/2009	Little Brothers-Friends of the Elderly	355 N Ashland Avenue Chicago, IL 60607	Chicago	IL	60607	1,500 00
11/18/2009	Holy Cross College	54515 SR 933 N Notre Dame, IN 46656	Notre Dame	IN	46656	2,700 00
11/30/2009	Sisters of the Holy Family of Nazareth	310 N River Road Des Plaines, IL 60016	Des Plaines	IL	60016	750 00
11/30/2009	Our Saviour's Lutheran Church	1234 N Arlington Hts Rd Arlington Hts , IL 60004	Arlington Hts	IL	60004	1,500 00
12/09/2009	Window to the World Communications, Inc	5400 N St Louis Ave Chicago, IL 60625	Chicago	IL	60625	180 00
12/09/2009	Generations Incorporated	25 Kingston St , 4th Floor Boston, MA 02111	Boston	MA	02111	1,500 00
12/09/2009	God's Awesome Army Ministries	4810 El Salvador Houston, TX 77066	Houston	TX	77066	7,500 00
12/11/2009	Chicago Public Library Foundation	20 N Michigan Ave -Suite 204 Chicago, IL 60602	Chicago	IL	60602	900 00
12/11/2009	Salvation Army					150 00
12/11/2009	White Crane Wellness Center	1657 W Foster Avenue Chicago, IL 60640	Chicago	IL	60640	375 00
12/15/2009	Coalition Limited EnglishSpeaking Elderly	53 W Jackson Blvd , Ste 1301 Chicago, IL 60604-3552	Chicago	IL	60604-3552	375 00
12/15/2009	St Jude Children's Research Hospital	501 St Jude Place Memphis, TN 38105	Memphis	TN	38105	300 00
12/15/2009	Benedictine Sisters of Chicago	St Scholastica Monastery 7430 N Ridge Blvd Chicago, IL 60645-1913	Chicago	IL	60645-1913	300 00
12/15/2009	Susan G Komen Breast Cancer Foundation	8765 W Higgins Ave , Ste 401 Chicago, IL 60631	Chicago	IL	60631	300 00
12/18/2009	Housing Opportunities & Maintenance	for the Elderly 1419 W Carroll Avenue, FL 2 Chicago, IL 60607-1419	Chicago	IL	60607-1419	1,500 00
12/18/2009	Working in the Schools	27 E Monroe, Suite 1400 Chicago, IL 60603	Chicago	IL	60603	2,700 00
12/18/2009	Mental Health Assoc of Palm Beach County	909 Fern Street West Palm Beach, FL 33401	West Palm Beach	FL	33401	150 00

The Retirement Research Foundation
List of Matching Gifts
January through December 2009

12/21/2009	Priests of the Sacred Heart	6889 S Lovers Lane Road Hales Corners, WI 53130	Hales Corners	WI	53130	405 00
12/21/2009	Wayland Academy	101 N University Avenue Beaver Dam, WI 53916	Beaver Dam	WI	53916	600 00
12/30/2009	Alzheimer's Association	225 N Michigan Ave , 17th Floor Chicago, IL 60601-7633	Chicago	IL	60601-7633	300 00
12/30/2009	Immaculate Conception Church	1431 N North Park Ave Chicago, IL 60610	Chicago	IL	60610	600 00
12/30/2009	Univ of Chicago-Graduate School Business	Booth Graduate School of Business 1427 E 60th St , Ste 120 Chicago, IL 60637	Chicago	IL	60637	450 00
12/30/2009	Easter Seals	233 S Wacker Drive, #2400 Chicago, IL 60606	Chicago	IL	60606	300 00
12/30/2009	Rehabilitation Institute of Chicago	345 E Superior St , #0-814 Chicago, IL 60611	Chicago	IL	60611	300 00
12/30/2009	Evanston Community Foundation	1007 Church St , #108 Evanston, IL 60201	Evanston	IL	60201	600 00
						231,255 00

RETIREMENT RESEARCH FOUNDATION
CHICAGO, ILLINOIS
FORM 990 PF
DECEMBER 31, 2009
36-2429540

GRANTS APPROVED FOR FUTURE PAYMENT
ATTACHMENT C
Part XV Page 11
Details to Line 3b
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The Retirement Research Foundation - EIN 36-2429540

Grants Approved for Future Payment - Attachment "C"

Payment Schedule Date is any date after 1/1/2010

14 January 2010

Request ID	Payee Organization	Request Project Description	Schedule Date	Amount
FY 2010				
2007225	Hebrew Senior Life Institute for Aging Research 1200 Centre Street Boston, Massachusetts 02131-1097	Three-year grant to examine and understand the processes and procedures of the Hospital Elder Life Program (HELP), a model of care to prevent delirium in hospitalized older adults, in order to develop guidelines for replication in additional sites	1/15/2010	$38,884
2007225	Hebrew Senior Life Institute for Aging Research 1200 Centre Street Boston, Massachusetts 02131-1097	Three-year grant to examine and understand the processes and procedures of the Hospital Elder Life Program (HELP), a model of care to prevent delirium in hospitalized older adults, in order to develop guidelines for replication in additional sites	7/15/2010	$36,835
2007253	Northwest Side Housing Center 5007 W. Addison Street Chicago, Illinois 60641	Three-year grant to improve marketing and resource development and purchase new technology	1/1/2010	$27,000
2007281	National Academy of Social Insurance 1776 Massachusetts Avenue, NW - Suite 615 Washington, DC 20036-1904	Three-year grant to continue an internship and mentoring program to develop young research leaders, focusing on long-term care and disability issues as key components in aging policies	1/1/2010	$37,837
2007298	Chinese Mutual Aid Association 1016 West Argyle Street Chicago, Illinois 60640	Three-year grant in partial support to establish the Golden Age Club, a senior program providing comprehensive senior services to ethnically diverse immigrant and refugee communities in Uptown neighborhood of Chicago	1/1/2010	$55,000
2008018	Planning for Elders in the Central City 965 Mission Street, Suite 550 San Francisco, California 94103	Three-year grant for education and advocacy to promote safer hospital-to-home transitions for older adults	10/1/2010	$35,052
2008018	Planning for Elders in the Central City 965 Mission Street, Suite 550 San Francisco, California 94103	Three-year grant for education and advocacy to promote safer hospital-to-home transitions for older adults	4/1/2010	$35.052

Request ID	Payee Organization	Request Project Description	Schedule Date	Amount
2008037	Career Resource Center 40 East Old Mill Road, Suite 105 Lake Forest, Illinois 60045	Three-year grant to develop and implement a marketing and communications program	7/1/2010	$12,000
2008054	Chicago Lights 126 East Chestnut Street Chicago, Illinois 60611	Three-year grant to continue to develop and implement member-driven programs and marketing strategies that will attract and serve more older adults, especially recent retirees in the 60 to 70 age group	7/1/2010	$3,500
2008055	University of Miami Office of the President PO Box 248006 Coral Gables, Florida 33124-4600	Two-year grant to implement, evaluate, and disseminate a multi-component psychosocial intervention designed to reduce adverse health effects, enhance work performance, and improve quality of life of working caregivers of older adults.	4/1/2010	$55,530
2008056	National Center for State Courts 300 Newport Avenue Williamsburg, Virginia 23185-4147	Two-year grant to launch the Center for Elders and the Courts to serve as the primary resource for judiciary and court management on issues related to aging	1/1/2010	$38,276
2008067	Galata, Inc 916 N. Flagler Avenue Homestead, Florida 33030	Two years grant to expand health, education, recreation, and social services to immigrant and minority elderly in Florida's Deep South.	2/1/2010	$30,000
2008068	Center for Disability and Elder Law 79 West Monroe Street, Suite 919 Chicago, Illinois 60603	Three-year grant for website development, improved database for client management, Board development, and increased staffing.	7/1/2010	$15,000
2008070	American Public Health Association 800 I Street, N.W. Washington, DC 20001-3710	Ten-year grant ($6,000 each year) for awards to six students annually for research excellence in gerontological health	11/15/2010	$6,000
2008073	National Council on Aging, Inc 1901 L Street, N.W , 4th Floor Washington, DC 20036	Three-year grant to facilitate and accelerate the large-scale replication of two effective evidence-based programs for older adults (one on fall prevention and one to treat depression) and to evaluate an innovative tool for helping agencies assess their readiness for and ability to implement new programs.	7/15/2010	$40,550
2008073	National Council on Aging, Inc. 1901 L Street, N W , 4th Floor Washington, DC 20036	Three-year grant to facilitate and accelerate the large-scale replication of two effective evidence-based programs for older adults (one on fall prevention and one to treat depression) and to evaluate an innovative tool for helping agencies assess their readiness for and ability to implement new programs	1/1/2010	$36,612

Request ID	Payee Organization	Request Project Description	Schedule Date	Amount
2008079	Housing Opportunities and Maintenance for the Elderly 5414-B West Roosevelt Road Chicago, Illinois 60644-1483	Three-year grant to implement H.O M E.'s first major gift campaign to meet the growing demand for their senior services.	7/1/2010	$38,514
2008086	Brown University Box G-B213 Providence, Rhode Island 02912	Three year grant to study how widespread the adoption of long-term care culture change is nationally, and to assess its quality of life and quality of care outcomes	6/15/2010	$61,307
2008086	Brown University Box G-B213 Providence, Rhode Island 02912	Three year grant to study how widespread the adoption of long-term care culture change is nationally, and to assess its quality of life and quality of care outcomes	12/15/2010	$61,306
2008097	Partners for Sacred Places 1700 Sansom Street, Tenth Floor Philadelphia, Pennsylvania 19103	Two-year grant for start-up of a Chicago regional program that will build the capacity of local religious congregations to sustain their buildings and services for the elderly and other populations in need.	1/1/2010	$37,500
2008135	Treasure Coast Hospice 1201 S.E Indian Street Stuart, Florida 34997	Two-year grant to establish, in collaboration with community hospitals, a regional Palliative Care program for seniors with chronic illnesses.	4/1/2010	$61,500
2008141	Alzheimer's Association Greater Illinois Chapter 8430 W Bryn Mawr, Ste. 800 Chicago, Illinois 60631	Thirty-month grant to replicate a model of palliative care for people with advanced dementia in two skilled care facilities and Rainbow Hospice in order to improve quality of life based on comfort rather than traditional medical care.	10/1/2010	$28,236
2008141	Alzheimer's Association Greater Illinois Chapter 8430 W. Bryn Mawr, Ste. 800 Chicago, Illinois 60631	Thirty-month grant to replicate a model of palliative care for people with advanced dementia in two skilled care facilities and Rainbow Hospice in order to improve quality of life based on comfort rather than traditional medical care.	4/1/2010	$55,535
2008153	Hamdard Center for Health and Human Services 228 East Lake Street Addison, Illinois 60101	Two-year grant in partial support for a full-time position to manage the adult day program located on the far north side of Chicago.	1/1/2010	$20,000
2008165	Research Triangle Institute 3040 Cornwallis Road PO Box 12194 Research Triangle Park, North Carolina 27709-2194	Two-year grant for research using new data from the National Assistant Survey to examine 1) the link between workforce variables and patient care outcomes, and 2) characteristics of the immigrant workforce in institutional long-term care (LTC) settings	4/1/2010	$44,315

Request ID	Payee Organization	Request Project Description	Schedule Date	Amount
2008166	Catholic Community Connection 2351 East 22nd Street Cleveland, Ohio 44115	Two-year grant for a training program for nurses on whole-person care [MH was original program officer for this]	1/1/2010	$28,787
2008166	Catholic Community Connection 2351 East 22nd Street Cleveland, Ohio 44115	Two-year grant for a training program for nurses on whole-person care [MH was original program officer for this]	7/15/2010	$28,787
2008176	University of Illinois at Chicago Office of the Chancellor 2833 University Hall 601 South Morgan Chicago, Illinois 60607-7128	Two-year grant to study factors associated with successful implementation and maintenance of Chronic Disease Self Management (CDSMP) program replications in Illinois, and how well participants continue the learned health management behaviors over several months	4/1/2010	$49,693
2008178	Families USA Foundation 1201 New York Avenue, NW, Suite 1100 Washington, DC 20005	Two-year grant for support to: 1)improve the capacity of the State Health Insurance and Assistance Programs (SHIPs) to resolve systemic problems of Medicare and become better counselors for Medicare recipients and 2) build the capacity of the Health Assistance Partnership (HAP) to become a better advocate for Medicare improvements at the national level	4/1/2010	$75,073
2008184	ROTARY/One Foundation, Inc 65 West Jackson Boulevard, Suite 911 Chicago, Illinois 60604	Six month grant for job preparedness training and summer internships for high school students in nonprofit agencies serving the elderly	1/15/2010	$13,600
2008212	Center for Medicare Advocacy, Inc. 1025 Connecticut Avenue NW, Suite 709 Washington, DC 20036	Two-year grant to improve the capacity of Medicare advocates and beneficiaries to handle complex Medicare appeals processes, resulting in greater access to needed health care	1/1/2010	$37,500
2008212	Center for Medicare Advocacy, Inc 1025 Connecticut Avenue NW, Suite 709 Washington, DC 20036	Two-year grant to improve the capacity of Medicare advocates and beneficiaries to handle complex Medicare appeals processes, resulting in greater access to needed health care	7/15/2010	$37,500
2008230	Organization of New City 5411 S. Carpenter Avenue Chicago, Illinois 60609	Three-year grant to help low-income elderly families cope with safety, utility, and housing issues	12/15/2010	$50,000

Request ID	Payee Organization	Request Project Description	Schedule Date	Amount
2008245	Jewish Family and Children's Services of Sarasota-Manatee 2688 Fruitville Rd. Sarasota, Florida 34237	Two-year grant to launch two aging- in-place programs for low-income seniors in an underserved area of southern Sarasota County	1/1/2010	$40,253
2008252	Seniors Action Service, Inc. 1123 Emerson, #200 Evanston, Illinois 60201	Two-year grant to build organizational capacity in the areas of marketing and resource development.	1/1/2010	$29,902
2008257	Alivio Medical Center 966 West 21st Street Chicago, Illinois 60608	Three-year grant to design and implement a chronic disease self-management program for seniors	7/1/2010	$42,500
2008257	Alivio Medical Center 966 West 21st Street Chicago, Illinois 60608	Three-year grant to design and implement a chronic disease self-management program for seniors	1/1/2010	$42,500
2008260	Family Caregiver Alliance 180 Montgomery Street, Suite 1100 San Francisco, California 94104	An 18-month grant to facilitate advocacy around state and federal policies designed to assist family caregivers through organization and dissemination of policy and resources.	1/1/2010	$41,100
2008262	CJE SeniorLife 3003 West Touhy Avenue Chicago, Illinois 60645	Requests $150,000 over three years to adapt, implement, and evaluate an aging in place service model for Orthodox Jewish elderly.	2/1/2010	$50,000
2008266	Interfaith Refugee & Immigration Ministries 4753 North Broadway Suite 401 Chicago, Illinois 60640	Three-year grant to develop services for two new immigrant populations of senior refugees and add a mentoring component to the program	2/1/2010	$50,000
2008271	Washington University in St Louis Campus Box 1196 One Brookings Drive St Louis, Missouri 63110-4899	Two-year grant to determine the impact of home modifications on physical activity and community participation of elderly with chronic diseases and mobility impairments.	7/1/2010	$32,499
2008271	Washington University in St. Louis Campus Box 1196 One Brookings Drive St. Louis, Missouri 63110-4899	Two-year grant to determine the impact of home modifications on physical activity and community participation of elderly with chronic diseases and mobility impairments	1/1/2010	$32,499

Request ID	Payee Organization	Request Project Description	Schedule Date	Amount
2009006	Laity in Support of Retired Priests, Inc 4140 Bayhead Drive, Suite 206 Bonita Springs, Florida 34134	Eighteen-month grant to define a model retirement program for U S. Diocesan priests.	5/15/2010	$15,000
2009027	Horizon Hospice & Palliative Care 833 West Chicago Avenue Chicago, Illinois 60622	One-year OCB grant to support the organization's training and management needs during its transition to Electronic Medical Records for improved organizational effectiveness and enhanced capacity for quality improvement through updated technology.	1/14/2010	$33,741
2009030	National Senior Citizens Law Center 1444 Eye Street, NW, 11th Floor Washington, DC 20005	One-year grant for advocacy to protect low-income elderly from limitations in eligiblity or benefits under Medicaid as states rework budgets to reduce their long-term care expenditures	1/14/2010	$49,239
2009067	Northwest Side Housing Center 5007 W. Addison Street Chicago, Illinois 60641	Requests $100,000 over one year toward the $500,000 startup costs required of new affiliates for ITNAmerica, a volunteer-based transportation service for seniors approved challenge grant for $25,000	6/15/2010	$25,000
2009068	Pioneer Network in Culture Change P.O. Box 18648 Rochester, New York 14618	One-year grant to develop, demonstrate, and disseminate a low-cost replicable process for implementing incremental environmental changes to help nursing homes move toward person-centered care.	1/14/2010	$49,456
2009069	Economic Opportunity Institute 1900 North Northlake Way, Suite 237 Seattle, Washington 98103	One-year grant to continue developing, coordinating, and implementing policy to establish a universal retirement savings account program in several states that will provide a low-cost, portable defined contribution account for every worker and enable all workers, especially those with low or moderate incomes or employed by small businesses, to save for retirement	1/14/2010	$37,500
2009126	Loyola University Medical Center 2160 South First Avenue Maywood, Illinois 60153	One-year grant to develop, implement, and evaluate an online program to educate nurse practitioners that prepares them to direct and deliver high-quality palliative care for nursing home residents and their families.	1/15/2010	$38,248
Total FY 2010 (49 items)				$1,841,718

Request ID	Payee Organization	Request Project Description	Schedule Date	Amount
FY 2011				
2007225	Hebrew Senior Life Institute for Aging Research 1200 Centre Street Boston, Massachusetts 02131-1097	Three-year grant to examine and understand the processes and procedures of the Hospital Elder Life Program (HELP), a model of care to prevent delirium in hospitalized older adults, in order to develop guidelines for replication in additional sites.	1/14/2011	$36,834
2008018	Planning for Elders in the Central City 965 Mission Street, Suite 550 San Francisco, California 94103	Three-year grant for education and advocacy to promote safer hospital-to-home transitions for older adults	4/1/2011	$35,052
2008070	American Public Health Association 800 I Street, N W Washington, DC 20001-3710	Ten-year grant ($6,000 each year) for awards to six students annually for research excellence in gerontological health.	11/15/2011	$6,000
2008073	National Council on Aging, Inc. 1901 L Street, N W., 4th Floor Washington, DC 20036	Three-year grant to facilitate and accelerate the large-scale replication of two effective evidence-based programs for older adults (one on fall prevention and one to treat depression) and to evaluate an innovative tool for helping agencies assess their readiness for and ability to implement new programs.	1/14/2011	$40,549
2008141	Alzheimer's Association Greater Illinois Chapter 8430 W. Bryn Mawr, Ste. 800 Chicago, Illinois 60631	Thirty-month grant to replicate a model of palliative care for people with advanced dementia in two skilled care facilities and Rainbow Hospice in order to improve quality of life based on comfort rather than traditional medical care.	4/1/2011	$28,237
2008257	Alivio Medical Center 966 West 21st Street Chicago, Illinois 60608	Three-year grant to design and implement a chronic disease self-management program for seniors.	7/1/2011	$47,500
2008257	Alivio Medical Center 966 West 21st Street Chicago, Illinois 60608	Three-year grant to design and implement a chronic disease self-management program for seniors	1/1/2011	$47,500
2008262	CJE SeniorLife 3003 West Touhy Avenue Chicago, Illinois 60645	Requests $150,000 over three years to adapt, implement, and evaluate an aging in place service model for Orthodox Jewish elderly	2/1/2011	$50,000

Request ID	Payee Organization	Request Project Description	Schedule Date	Amount
2008266	Interfaith Refugee & Immigration Ministries 4753 North Broadway Suite 401 Chicago, Illinois 60640	Three-year grant to develop services for two new immigrant populations of senior refugees and add a mentoring component to the program	2/1/2011	$50,000
Total FY 2011 (9 items)				$341,672
FY 2012				
2008070	American Public Health Association 800 I Street, N.W Washington, DC 20001-3710	Ten-year grant ($6,000 each year) for awards to six students annually for research excellence in gerontological health	11/15/2012	$6,000
Total FY 2012 (1 item)				$6,000
FY 2013				
2008070	American Public Health Association 800 I Street, N W Washington, DC 20001-3710	Ten-year grant ($6,000 each year) for awards to six students annually for research excellence in gerontological health	11/15/2013	$6,000
Total FY 2013 (1 item)				$6,000
FY 2014				
2008070	American Public Health Association 800 I Street, N.W. Washington, DC 20001-3710	Ten-year grant ($6,000 each year) for awards to six students annually for research excellence in gerontological health	11/15/2014	$6,000
Total FY 2014 (1 item)				$6,000
FY 2015				
2008070	American Public Health Association 800 I Street, N W. Washington, DC 20001-3710	Ten-year grant ($6,000 each year) for awards to six students annually for research excellence in gerontological health	11/15/2015	$6,000
Total FY 2015 (1 item)				$6,000
FY 2016				
2008070	American Public Health Association 800 I Street, N.W. Washington, DC 20001-3710	Ten-year grant ($6,000 each year) for awards to six students annually for research excellence in gerontological health	11/15/2016	$6,000

Request ID	Payee Organization	Request Project Description	Schedule Date	Amount
Total FY 2016 (1 item)				$6,000
FY 2017				
2008070	American Public Health Association 800 I Street, N W Washington, DC 20001-3710	Ten-year grant ($6,000 each year) for awards to six students annually for research excellence in gerontological health.	11/15/2017	$6,000
Total FY 2017 (1 item)				$6,000
Grand Totals (64 items)				$2,219,390