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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.

2012

Open to public inspection

For calendar year 2012 or tax year beginning

, and ending

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 ☐
G Check all that apply: ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		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) \$ 122,472,315. (Part I, column (d) must be on cash basis.)	J Accounting method: ☐ Cash ☒ Accrual ☐ Other (specify) _____	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)
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		957.	957.		Statement 2
4 Dividends and interest from securities		2,877,377.	2,877,377.		Statement 3
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		6,695,204.			
b Gross sales price for all assets on line 6a		6,695,204.			
7 Capital gain net income (from Part IV, line 2)			6,695,204.		
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		<434,494.>	<529,312.>		Statement 4
12 Total. Add lines 1 through 11		9,139,044.	9,044,226.		
13 Compensation of officers, directors, trustees, etc.		349,506.	58,651.		290,855.
14 Other employee salaries and wages		552,854.	12,167.		540,687.
15 Pension plans, employee benefits		267,920.	14,342.		253,578.
16a Legal fees		4,970.	4,970.		0.
b Accounting fees		63,450.	46,200.		17,250.
c Other professional fees		2,053,584.	1,916,976.		136,608.
17 Interest		781,332.	781,332.		0.
18 Taxes		224,262.	77,773.		0.
19 Depreciation and depletion		17,020.	1,702.		
20 Occupancy		120,194.	12,019.		108,175.
21 Travel, conferences, and meetings		37,101.	880.		36,221.
22 Printing and publications		2,115.	212.		1,903.
23 Other expenses		79,855.	2,947.		76,908.
24 Total operating and administrative expenses. Add lines 13 through 23		4,554,163.	2,930,171.		1,462,185.
25 Contributions, gifts, grants paid		4,293,842.			5,217,825.
26 Total expenses and disbursements. Add lines 24 and 25		8,848,005.	2,930,171.		6,680,010.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		291,039.			
b Net investment income (if negative, enter -0-)			6,114,055.		
c Adjusted net income (if negative, enter -0-)				N/A	

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		<1.>	<1.>
	2 Savings and temporary cash investments	300,512.	43,642.	43,642.
	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	2,540.	93,854.	93,854.
	10a Investments - U.S. and state government obligations Stmt 10	1,824,091.	2,060,182.	2,060,182.
	b Investments - corporate stock Stmt 11	6,545,075.	7,458,360.	7,458,360.
	c Investments - corporate bonds Stmt 12	1,110,894.	759,888.	759,888.
11 Investments - land, buildings, and equipment: basis ▶				
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other Stmt 13	109,108,131.	111,972,978.	111,972,978.	
14 Land, buildings, and equipment: basis ▶ 246,687.				
Less: accumulated depreciation Stmt 14 ▶	163,275.	51,453.	83,412.	
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers)	118,942,696.	122,472,315.	122,472,315.	
Liabilities	17 Accounts payable and accrued expenses	255,482.	66,738.	
	18 Grants payable	4,387,262.	3,463,279.	
	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)	4,642,744.	3,530,017.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☒ and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted	114,299,952.	118,942,298.	
	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	114,299,952.	118,942,298.		
31 Total liabilities and net assets/fund balances	118,942,696.	122,472,315.		

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	114,299,952.
2 Enter amount from Part I, line 27a	2	291,039.
3 Other increases not included in line 2 (itemize) ▶ <u>Unrealized Security Appreciation</u>	3	4,351,307.
4 Add lines 1, 2, and 3	4	118,942,298.
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	118,942,298.

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 6,695,204.			6,695,204.

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			6,695,204.

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	6,695,204.
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 the 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))
2011	5,969,076.	121,147,588.	.049271
2010	5,885,346.	113,459,220.	.051872
2009	8,380,409.	105,671,344.	.079306
2008	9,734,268.	145,634,248.	.066841
2007	10,607,232.	172,969,464.	.061324

2 Total of line 1, column (d)	2	.308614
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	.061723
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	4	119,359,162.
5 Multiply line 4 by line 3	5	7,367,206.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	61,141.
7 Add lines 5 and 6	7	7,428,347.
8 Enter qualifying distributions from Part XII, line 4	8	6,724,091.

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 ☐ and enter 1% of Part I, line 27b
- 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-)
- 3 Add lines 1 and 2
- 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)
- 5 **Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-

6 Credits/Payments:

- a 2012 estimated tax payments and 2011 overpayment credited to 2012
- b Exempt foreign organizations - tax withheld at source
- c Tax paid with application for extension of time to file (Form 8868)
- d Backup withholding erroneously withheld

6a	154,000.
6b	
6c	
6d	

- 7 Total credits and payments. Add lines 6a through 6d
- 8 Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached
- 9 **Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed**
- 10 **Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid**
- 11 Enter the amount of line 10 to be: **Credited to 2013 estimated tax** **Refunded**

1	122,281.
2	0.
3	122,281.
4	0.
5	122,281.
7	154,000.
8	
9	
10	31,719.
11	0.

Part VII-A Statements Regarding Activities

- 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?
- 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.
- c Did the foundation file Form 1120-POL for this year?
- 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.
- 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
- 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?
- b If "Yes," has it filed a tax return on Form 990-T for this year?
- 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?
If "Yes," attach the statement required by General Instruction T.
- 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?
- 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.
- 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
- 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 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? If "Yes," complete Part XIV
- 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

	Yes	No
1a		X
1b		X
1c		X
2		X
3		X
4a	X	
4b	X	
5		X
6	X	
7	X	
8b	X	
9		X
10		X

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Part VII-A Statements Regarding Activities (continued)

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 make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>http://www.rrf.org</u>	13	X	
14	The books are in care of ► <u>Irene Frye</u> Telephone no. ► <u>773-714-8080</u> Located at ► <u>8765 W. Higgins Road, Suite 430, Chicago, IL</u> ZIP+4 ► <u>60631</u>			
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	
16	At any time during calendar year 2012, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►	16	Yes	No X

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	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 instructions)? Organizations relying on a current notice regarding disaster assistance check here			1b	X
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 2012?			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 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012? If "Yes," list the years ►	☐ Yes	☒ No		
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.)			2b	N/A
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 2012 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 2012.)			3b	N/A
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 2012?			4b	X

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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

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?

If "Yes" to 6b, file Form 8870.

☐ Yes ☒ No**7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

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

See Statement 16

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 15		349,506.	25,532.	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	154,916.	23,160.	0.
Julie Kaufman PHD - c/o RRF 8765 W. Higgins #430, Chicago, IL 60631	Program Officer 40.00	134,231.	20,057.	0.
Mary O'Donnell - c/o RRF 8765 W. Higgins #430, Chicago, IL 60631	Program Officer 40.00	81,551.	12,218.	0.
Lee Parker MEd - c/o RRF 8765 W. Higgins #430, Chicago, IL 60631	Grants and IT Administrator 40.00	60,349.	0.	0.

Total number of other employees paid over \$50,000

0

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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 Naomi M Stanhaus 1847 N Howe Street, Chicago, IL 606145125 Varey & Vaccariello CPAs PC - 617 E Golf Road #107, Arlington Heights, IL 60005	Investment Management Program Consultant Accounting and Tax	 1,888,600. 106,250. 55,265.
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 None	
	0.
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 None	
	0.
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0.

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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	120,636,043.
b Average of monthly cash balances	1b	540,771.
c Fair market value of all other assets	1c	
d Total (add lines 1a, b, and c)	1d	121,176,814.
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	121,176,814.
4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	1,817,652.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	119,359,162.
6 Minimum investment return. Enter 5% of line 5	6	5,967,958.

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	5,967,958.
2a Tax on investment income for 2012 from Part VI, line 5	2a	122,281.
b Income tax for 2012. (This does not include the tax from Part VI.)	2b	6,564.
c Add lines 2a and 2b	2c	128,845.
3 Distributable amount before adjustments. Subtract line 2c from line 1	3	5,839,113.
4 Recoveries of amounts treated as qualifying distributions	4	46,260.
5 Add lines 3 and 4	5	5,885,373.
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	5,885,373.

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	6,680,010.
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	44,081.
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	6,724,091.
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	0.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	6,724,091.

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.

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2011	(c) 2011	(d) 2012
1 Distributable amount for 2012 from Part XI, line 7				5,885,373.
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2012:				
a From 2007	3,569,810.			
b From 2008	8,795,657.			
c From 2009	3,156,668.			
d From 2010	367,868.			
e From 2011	146,096.			
f Total of lines 3a through e	16,036,099.			
4 Qualifying distributions for 2012 from Part XII, line 4: ► \$ 6,724,091.				
a Applied to 2011, 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 2012 distributable amount				5,885,373.
e Remaining amount distributed out of corpus	838,718.			
5 Excess distributions carryover applied to 2012 (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	16,874,817.			
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 2011. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2012. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013				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 2007 not applied on line 5 or line 7	3,569,810.			
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a	13,305,007.			
10 Analysis of line 9:				
a Excess from 2008	8,795,657.			
b Excess from 2009	3,156,668.			
c Excess from 2010	367,868.			
d Excess from 2011	146,096.			
e Excess from 2012	838,718.			

N/A

- ☐ 4942(1)(3) or ☐ 4942(1)(5)

- (4) Gross investment income**

[illegible]

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 Paid for General Funding Interests See Attachment A	None	All are Pub Charity or Gov't	See attachment A	5,059,875.
Matching Gifts Program See Attachment B	None	All are Pub Charity or Gov't	See attachment B	157,950.
Total			3a	5,217,825.
b Approved for future payment				
Grants Payable to General Funding Interests See Attachment C	None	All are Pub Charity or Gov't	See attachment C	3,463,279.
Total			3b	3,463,279.

2012 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
	Computer Equipment											
19	Laser Jet Printer	041006SL		5.00	16	1,351.			1,351.	1,351.		0.
	Eaton Battery											
22	Backup	080108SL		5.00	16	1,173.			1,173.	802.		235.
24	CDW Color Printer	020510SL		5.00	16	1,307.			1,307.	412.		261.
	TWO 24" MONITORS											
27	HPZR24	081611SL		5.00	16	774.			774.	77.		155.
	HP DL380 G7 KMAT											
28	CTO SERVER	092311SL		5.00	16	16,624.			16,624.	1,662.		3,325.
29	SERVER INSTALLATION	121211SL		5.00	16	15,700.			15,700.	1,570.		3,140.
32	Computer Equipment	VariesSL		5.00	16	15,931.			15,931.	15,931.		0.
33	File Server	063012SL		5.00	16	14,272.			14,272.			1,427.
34	15 Workstations	063012SL		5.00	16	27,673.			27,673.			2,767.
	Broadband											
35	Installation and EQ	063012SL		5.00	16	5,400.			5,400.			540.
36	IPAD	063012SL		5.00	16	499.			499.			50.
	* 990-PF Pg 1 Total											
	- Computer Equipme					100,704.		0.	100,704.	21,805.	0.	11,900.
	Furniture & Fixtures											
	Furniture & Fixtures											
2	Fixtures	VariesSL		5.00	16	79,085.		3,872.	75,213.	75,213.		0.
25	New Office Chairs	070610SL		5.00	16	4,152.			4,152.	1,245.		830.
26	TWO FOLDING TABLES	030811SL		5.00	16	432.			432.	43.		86.
37	Off Eq HP Projector	063012SL		5.00	16	1,135.			1,135.			114.

228102
05-01-12

(D) - Asset disposed

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

2012 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
	* 990-PF Pg 1 Total - Furniture & Fixt					84,804.		3,872.	80,932.	76,501.	0.	1,030.
	Office Equipment											
50	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.	20,295.		0.
23	Toshiba Strategy	040208	SL	5.00	16	8,623.			8,623.	6,036.		1,725.
	* 990-PF Pg 1 Total - Office Equipment					36,733.		0.	36,733.	34,146.	0.	1,725.
30	Software	032499	SL	5.00	16	12,620.			12,620.	12,620.		0.
	NETWORK VM WARE											
30	CISCO	122111	SL	5.00	16	6,130.			6,130.	613.		1,226.
	NETWORK UPGRADE											
31	BACKUP SW	122211	SL	5.00	16	5,696.			5,696.	570.		1,139.
	* 990-PF Pg 1 Total - Office Equipment					24,446.		0.	24,446.	13,803.	0.	2,365.
	* Grand Total											
	990-PF Pg 1 Depr					246,687.		3,872.	242,815.	146,255.	0.	17,020.

228102
05-01-12

(D) - Asset disposed

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

Form 990-PF Interest on Savings and Temporary Cash Investments Statement 2

Source	Amount
Urban Partnership Bank	957.
Total to Form 990-PF, Part I, line 3, Column A	957.

Form 990-PF Dividends and Interest from Securities Statement 3

Source	Gross Amount	Capital Gains Dividends	Column (A) Amount
Global Endowment Fund II LP	2,536,389.	0.	2,536,389.
Global Endowment Fund II LP	50,067.	0.	50,067.
Mid-Continent Capital	290,921.	0.	290,921.
Total to Fm 990-PF, Part I, ln 4	2,877,377.	0.	2,877,377.

Form 990-PF Other Income Statement 4

Description	(a) Revenue Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income
Returned Grants	46,260.	0.	
Unrelated Business Taxable Income	54,220.	0.	
Net Ordinary and Other Portfolio Income and (Losses) from K-1	<529,312.>	<529,312.>	
Non Taxable Income and Non deductible expense-net	<5,662.>	0.	
Total to Form 990-PF, Part I, line 11	<434,494.>	<529,312.>	

Form 990-PF	Legal Fees	Statement	5
-------------	------------	-----------	---

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
General legal fees relating to foundation taxes: Quarles & Brady	4,970.	4,970.		0.
To Fm 990-PF, Pg 1, ln 16a	4,970.	4,970.		0.

Form 990-PF	Accounting Fees	Statement	6
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Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Auditing&consulting fees: Murray, Grishaber LLC	14,500.	7,250.		7,250.
Bookkeeping, Payroll and Tax Services: Varey & Vaccariello CPAs PC	48,950.	38,950.		10,000.
To Form 990-PF, Pg 1, ln 16b	63,450.	46,200.		17,250.

Form 990-PF	Other Professional Fees	Statement	7
-------------	-------------------------	-----------	---

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Investment management services:	0.	0.		0.
Mid Continent Capital LLC	28,376.	28,376.		0.
Investment management services: Global Endowment Fund II	1,888,600.	1,888,600.		0.
Program Grant Evaluation Consultants	136,608.	0.		136,608.
To Form 990-PF, Pg 1, ln 16c	2,053,584.	1,916,976.		136,608.

Form 990-PF	Taxes			Statement	8
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Excise tax	125,474.	0.		0.	
Tax on Foreign Dividends	77,773.	77,773.		0.	
Unrelated Business Income					
Taxes Fed	15,029.	0.		0.	
Unrelated Business Income					
Taxes IL	5,986.	0.		0.	
To Form 990-PF, Pg 1, ln 18	224,262.	77,773.		0.	

Form 990-PF	Other Expenses			Statement	9
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Computer expense	37,632.	0.		37,632.	
Insurance	15,230.	1,523.		13,707.	
Office Supplies and Expense	10,982.	765.		10,217.	
Dues and Memberships	8,820.	0.		8,820.	
Postage and Shipping	6,590.	659.		5,931.	
Organizational Capacity					
Building Initiative Expenses	601.	0.		601.	
To Form 990-PF, Pg 1, ln 23	79,855.	2,947.		76,908.	

Form 990-PF	U.S. and State/City Government Obligations			Statement	10
Description	U.S. Gov't	Other Gov't	Book Value	Fair Market Value	
Mid-Continent Capital-ETF's	X		2,060,182.	2,060,182.	
Total U.S. Government Obligations			2,060,182.	2,060,182.	
Total State and Municipal Government Obligations					
Total to Form 990-PF, Part II, line 10a			2,060,182.	2,060,182.	

Form 990-PF	Corporate Stock	Statement 11
-------------	-----------------	--------------

Description	Book Value	Fair Market Value
Mid-Continent Capital-ETF's	7,458,360.	7,458,360.
Total to Form 990-PF, Part II, line 10b	7,458,360.	7,458,360.

Form 990-PF	Corporate Bonds	Statement 12
-------------	-----------------	--------------

Description	Book Value	Fair Market Value
Mid-Continent Capital-ETF's	759,888.	759,888.
Total to Form 990-PF, Part II, line 10c	759,888.	759,888.

Form 990-PF	Other Investments	Statement 13
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Description	Valuation Method	Book Value	Fair Market Value
Global Endowment Fund II LP	FMV	111,972,978.	111,972,978.
Total to Form 990-PF, Part II, line 13		111,972,978.	111,972,978.

Form 990-PF	Depreciation of Assets Not Held for Investment	Statement 14
-------------	--	--------------

Description	Cost or Other Basis	Accumulated Depreciation	Book Value
Furniture & Fixtures	79,085.	75,213.	3,872.
Software	12,620.	12,620.	0.
Office Equipment	7,815.	7,815.	0.
Laser Jet Printer	1,351.	1,351.	0.
Copy Machine	20,295.	20,295.	0.
Eaton Battery Backup	1,173.	1,037.	136.
Toshiba Strategy Phone System	8,623.	7,761.	862.
CDW Color Printer	1,307.	673.	634.
New Office Chairs	4,152.	2,075.	2,077.
TWO FOLDING TABLES	432.	129.	303.
TWO 24" MONITORS HPZR24	774.	232.	542.

HP DL380 G7 KMAT CTO SERVER	16,624.	4,987.	11,637.
SERVER INSTALLATION	15,700.	4,710.	10,990.
NETWORK VM WARE CISCO	6,130.	1,839.	4,291.
NETWORK UPGRADE BACKUP SW	5,696.	1,709.	3,987.
Computer Equipment	15,931.	15,931.	0.
File Server	14,272.	1,427.	12,845.
15 Workstations	27,673.	2,767.	24,906.
Broadband Installation and EQ	5,400.	540.	4,860.
IPAD	499.	50.	449.
Off Eq HP Projector	1,135.	114.	1,021.
Total To Fm 990-PF, Part II, ln 14	246,687.	163,275.	83,412.

Form 990-PF	Part VIII - List of Officers, Directors Trustees and Foundation Managers	Statement 15
-------------	---	--------------

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	34,000.	0.	0.
Edward J. Kelly c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Trustee 4.00	2,000.	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 6.00	21,500.	0.	0.
Ruth Ann Watkins c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Secretary/Trustee 3.00	24,500.	0.	0.
Richard J. Kissel c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Trustee 3.00	18,500.	0.	0.
Irene Frye c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Executive Director 40.00	171,006.	25,532.	0.

Retirement Research Foundation36-2429540

Downey R. Varey, CPA c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Treasurer/Trustee 6.00	20,000.	0.	0.
Thomas E. Chomicz c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Trustee 6.00	12,000.	0.	0.
Marilyn Hennessy c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Trustee 6.00	20,000.	0.	0.
Thomas R. Prohaska, Ph D c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Trustee 6.00	3,000.	0.	0.
Cheryl E. Woodson, MD c/o RRF 8765 W Higgins #430 Chicago, IL 606314170	Trustee 6.00	3,000.	0.	0.

Totals included on 990-PF, Page 6, Part VIII

349,506.	25,532.	0.
----------	---------	----

Form 990-PF

Officers, Directors, Trustees and
Foundation Managers Compensation Explanation
Part VIII, Line 1

Statement 16

Person's Name

Downey R Varey Trustee

Compensation Explanation

Mr Varey's compensation as Trustee for the year ended 12/31/12 totaled \$20,000. Mr. Varey also is a partner in the accounting firm of Varey & Vaccariello CPAs PC, which the Foundation paid accounting, consulting and tax related fees totaling \$57,250 for the year ended 12/31/12. All of those services to the Foundation were provided by Mr. Varey, and he was compensated by the accounting firm for them.

Form 990-PF

Grant Application Submission Information
Part XV, Lines 2a through 2d

Statement 17

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 606314022

Telephone Number

773-714-8080

Email Address

frye@rrf.org

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: Program Application Packages

Form 990-PF

Other Revenue

Statement 18

Description	Bus Code	Unrelated Business Inc	Excl Code	Excluded Amount	Related or Exempt Func- tion Income
Returned Grants					46,260.
Unrelated Business Taxable Income	523000	54,220.			
Net Ordinary and Other Portfolio Income and (Losses) from K-1			14	<529,312.>	
Non Taxable Income and Non deductible expense-net			14	<5,662.>	
Total to Form 990-PF, Pg 12, ln 11		54,220.		<534,974.>	46,260.

Retirement Research Foundation

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 MCC Managed Funds		P		
b Global Endowment Fund K-1 26-1741307		P		
c Global Endowment Fund K-1 26-1741307		P		
d From Form 4797		P		
e From Form 6781		P		
f From Form 6781		P		
g Litigation Proceeds		P		
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 528,867.			528,867.
b 882,014.			882,014.
c 5,037,788.			5,037,788.
d 31,269.			31,269.
e 77,252.			77,252.
f 115,878.			115,878.
g 22,136.			22,136.
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			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
(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	
a			528,867.
b			882,014.
c			5,037,788.
d			31,269.
e			77,252.
f			115,878.
g			22,136.
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	6,695,204.
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

**RETIREMENT RESEARCH FOUNDATION
CHICAGO, ILLINOIS**

**FORM 990 PF
DECEMBER 31, 2012
36-2429540**

**GENERAL PROGRAM
ATTACHMENT 1
Part XV Page 10 Line 2b
Page 1**

THE RETIREMENT RESEARCH FOUNDATION

(773) 714-8080

ABOUT RRF

GRANTS

APPLY

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Grants

Grants

OCB Program

Accessible Faith Program

The Retirement Research Foundation > Grants & Programs > Grants

Grants

APPLY

PURPOSE

Funding for RRF's general program of grantmaking is given to efforts that support the Foundation's funding interests

- 1 Improve the availability and quality of community-based and long-term services and supports
- 2 Provide new and expanded opportunities for older adults to engage in meaningful roles in society
- 3 Seek causes and solutions to significant problems of older adults
- 4 Increase the number of professionals and paraprofessionals adequately prepared to serve the elder population

[Click here](#) to get more detail about the Foundation's funding interests

Grantseekers should also review exceptions—projects that are **not funded** by RRF

ELIGIBILITY

Nonprofit organizations throughout the United States that focus on advocacy, research, or continuing education and training related to older adults. Direct service requests will be considered *only* from organizations in these seven states: Illinois, Indiana, Iowa, Kentucky, Missouri, Wisconsin and Florida.

KEY CHARACTERISTICS

The Foundation gives priority to organizations that embody the following characteristics for success:

Nonprofit best practices, such as strong leadership, responsible governance, fiscal responsibility and viability, and ongoing evaluation

Early planning and implementation of strategies to sustain projects 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

Use of clearly focused, collaborative efforts to address systemic problems

Forging strategic partnerships with organizations in the field and funders to achieve better use of resources and sharing of knowledge

DEADLINES

Proposals are due February 1, May 1, and August 1. Decisions are usually made four months after each deadline.

RELATED LINKS

[Application Package](#)[Case Studies](#)[Mission](#)[Funding Policies](#)

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**RETIREMENT RESEARCH FOUNDATION
CHICAGO, ILLINOIS
FORM 990 PF
DECEMBER 31, 2012
36-2429540**

**ORGANIZATIONAL CAPACITY BUILDING INITIATIVE
ATTACHMENT 2
Part XV Page 10 Line 2b
Page 1**

THE RETIREMENT RESEARCH FOUNDATION

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[ABOUT RRF](#)[GRANTS](#)[APPLY](#)[NEWS](#)[CONTACT US](#)[AA](#)[SEARCH](#)

Grants

[Grants](#)[OCB Program](#)[Accessible Faith Program](#)[The Retirement Research Foundation > Grants & Programs > OCB Program](#)

OCB Program

[APPLY](#)

PURPOSE

The **Organizational Capacity Building (OCB) Program** supports metropolitan Chicago-area nonprofit organizations in making improvements in their governance, management, and organizational capacity. RRF recognizes that as stronger organizations, these nonprofits can further enhance and sustain their services to older persons.

Two types of funding are available to Chicago-area organizations through RRF's OCB Program:

Standard OCB Grants are awarded to help organizations make long-term improvements in their management, governance, or organizational capacity.

Flexible OCB Funds are available to help organizations set their capacity-building priorities or get short-term technical assistance to weather tough times.

GRANT USE

OCB grants have funded such activities as:

- Planning (strategic, business, and financial plans) to steer an organization through changes
- Evaluations to develop outcome measurements and strengthen accountability to constituents and funding sources
- Public relations, communications, and marketing to increase awareness and use of services
- Financial management and resource development to improve financial systems, explore revenue options, and develop a stronger funding base
- Human resources management for professional development, team building, and improving 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
- Board development including assessment, recruitment, training, and structuring to strengthen governance

EXCLUSIONS

RRF does not provide funding for renovations or capital improvements, deficits, or one-time events that do not build long-term capacity, i.e., fundraising events or one-time conferences.

Generally, organizations must have been in active operation for a minimum of three years and have annual revenue of at least \$75,000, excluding in-kind donations and services.

ELIGIBILITY

Applying organizations must:

- 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 elders
- Intentionally give a high priority to older persons

RELATED LINKS

- [Standard OCB Grant Application Package](#)
- [Flexible OCB Funds Application Package](#)

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**RETIREMENT RESEARCH FOUNDATION
CHICAGO, ILLINOIS
FORM 990 PF
DECEMBER 31, 2012
36-2429540**

**ACCESSIBLE FAITH GRANT PROGRAM
ATTACHMENT 3
Part XV Page 10 Line 2b
Page 1**

THE RETIREMENT RESEARCH FOUNDATION

(773) 714-8080

[ABOUT RRF](#)[GRANTS](#)[APPLY](#)[NEWS](#)[CONTACT US](#)[A A](#) [SEARCH](#)

Grants

[Grants](#)[OCB Program](#)[Accessible Faith Program](#)[The Retirement Research Foundation > Grants & Programs > Accessible Faith Program](#)

Accessible Faith Program

[APPLY](#)

PURPOSE

The Accessible Faith Program is designed to assist eligible Chicago-area houses of worship to improve physical access that will enable greater participation by older adults in the congregation's programs, services, and activities. Grants are awarded for up to 50 percent of a project's total cost, to a maximum amount of \$30,000.

The deadline for submission of your [Application Package](#) is June 1.

GRANT USE

Construction projects: Installing elevators, platform lifts, or inclined platform lifts, constructing permanent ramps, or renovating restrooms for accessibility in existing buildings. These projects generally require a building permit.

Purchase and installation of accessibility-related equipment such as assistive listening systems, automatic door openers, etc.

EXCLUSIONS

Grants support stand-alone accessibility improvements, not projects that are part of major new construction or overall large-scale renovation. Grants cannot be used for:

- Chairlifts because they do not provide accessibility for all people who have difficulty climbing stairs
- Used equipment because of the possible lack of required maintenance or warranty
- The purchase of accessible vehicles or individual mobility aids, such as wheelchairs or walkers
- Projects that are already completed

ELIGIBILITY

The faith-based congregation must be:

- A nonprofit organization that owns the facility where improvements will be made
- Located in these six Illinois counties: Cook, DuPage, Kane, Kendall, Lake, and McHenry Counties
- Offering programs beyond worship services that benefit older adults (age 65 or older)
- Able to demonstrate financial need as well as the ability to raise sufficient additional funds to complete the project

RELATED LINKS

[Application Package](#)

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**RETIREMENT RESEARCH FOUNDATION
CHICAGO, ILLINOIS
FORM 990 PF
DECEMBER 31, 2012
36-2429540**

**APPLICATION PROCEDURES
ATTACHMENT 4
Part XV Page 10 Line 2d
Pages 1 through 7**

THE RETIREMENT RESEARCH FOUNDATION

(773) 714-8080

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Application Package

Grant Application Procedures

Applications for Foundation Grants are normally considered three times a year. **Deadlines for receipt of requests are February 1, May 1, and August 1.** Submissions may be postmarked with the deadline date. We acknowledge, by letter, receipt of all proposals within two weeks. If the date falls on a weekend, proposals postmarked the next business day will be accepted. Decisions are usually made four months after each deadline.

Are You Eligible?

Important First Steps To Apply For A New Grant

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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 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 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, preferably in this order:

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, [click here](#).

2. Executive Summary

A separate two- to three-page executive summary that includes 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 measurable project objectives should be identified clearly, concisely, and completely. The anticipated outcomes and/or accomplishments should be defined.

5. Description of Methods

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 methods 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 means by which it will be analyzed and interpreted, and ethical issues 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, 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. Applicants requesting funds for research should include in their written budget narrative a list of other funded projects on which each investigator is working, and their percent of time on each project. 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 evidence of tax exempt status under Section 501 (c)(3) of the Internal Revenue Code.

Applicants must be designated as a public charity under section 509 (a)(1), 509 (a)(2), or 509 (a)(3).

Organizations classified as a private foundation are not eligible for support.

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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[ABOUT RRF](#)[GRANTS](#)[APPLY](#)[NEWS](#)[CONTACT US](#)[AA SEARCH](#)**Apply****Are You Eligible?****Important First Steps To Apply For A New Grant****Apply: Grants**[Application Package](#)[Case Studies](#)**Apply: Standard OCB**[Application Package](#)[Case Studies](#)**Apply: Flexible OCB Funds****Apply: Accessible Faith**[Application Package](#)[Case Studies](#)[Resources](#)**Evaluation Guidelines****Terms to Know**[The Retirement Research Foundation > Apply > Apply: Standard OCB > Application Package](#)**Application Package**

This section contains the following information to assist you in applying for a standard OCB grant

Proposal Evaluation Criteria**Application Instructions****Proposal Summary Instructions****Proposal Narrative Instructions****Requirements for Proposal Attachments****Cover Sheet****Proposal Evaluation Criteria**

The Foundation will use the following criteria in evaluating proposals for standard OCB grants

There is evidence that the organization provides credible services, is respected by its community, and intentionally gives a high priority to the elderly

The organization clearly identifies the management and/or governance area that an OCB grant would address and its effect on the agency's ability to serve the elderly more efficiently and effectively

The anticipated outcomes of the OCB grant are clearly described and will positively change the organization and its services to the elderly

The capacity building activities and time frame are logical and realistic

The organization outlines a reasonable plan to evaluate the outcomes of an OCB grant

The organization identifies team members from its management, staff, board, or others that are appropriate to the nature of the proposed organizational capacity building effort

If the organization requests a coach, it identifies potential benefits and demonstrates a willingness to accept such guidance

The proposed use of OCB funds is reasonable and realistically fits the scope of the project

The organization has sufficient financial stability to undertake and sustain the capacity building project

[Back to top](#)**Application Instructions**

Please follow these instructions in preparing a proposal for the OCB Program. Download and complete the cover sheet which is at the end of this information. Submit an original and one copy of the cover sheet, your summary, proposal, and attachments. Mail (no fax or e-mail) the application package to

Mary O'Donnell
 Program Officer
 The Retirement Research Foundation
 8765 West Higgins Road – Suite 430
 Chicago, Illinois 60631
 (773) 714-8080

[Back to top](#)**Proposal Summary Instructions**

Provide a one to two page, single-spaced summary in 12-point type

[Back to top](#)**Proposal Narrative Instructions**

Respond to these questions in the order listed here. Please number each response and do not skip any questions. Please number the pages.

1. Organization's Background

Describe your organization, the community, and senior population it serves. What services does your organization provide for the elderly? What evidence can you provide that your organization has intentionally designed services for the elderly and that older adults are a high priority for your organization?

Describe your board of directors, i.e., number of members and percentage over age 60, affiliations including business, community and other organizations, and total financial contribution from your board for last year.

2. Description of Project Area

Describe the organizational capacity building area that you wish to address

How does this area currently affect your organization and its ability to provide services for older adults?

If your organization has already taken some steps to address this area, describe them

What efforts have been made to gain staff and board support for working on these areas and to prepare them for changes that may occur as a result?

3. Project Outcomes

What are the goals and/or outcomes that your organization expects as a result of this organizational capacity building effort? How will the outcomes change your organization?

How will the proposed organizational capacity building project impact the elders served by your organization?

4. Work Plan and Timetable

Describe the organizational capacity building activities that your organization will undertake over the course of the grant. Put the activities in priority order.

Provide a timetable for these activities.

5. Evaluation

How will your organization evaluate whether the outcomes have been achieved?

What quantifiable indicators will be used to provide evidence that the outcomes are achieved?

6. Capacity Building Team/Organizational Commitment

Generally, capacity building involves a working team of staff, board, and volunteers to ensure that changes will be long-term for the organization.

Who will serve on your organization's project team and what responsibility will they assume? Who will lead the team?

What current and new staff will be needed for the project? If your organization plans to hire new staff, include a job description.

How will existing staff who are expected to be involved in capacity building handle these activities in addition to their current ones?

Note: If you do not plan to use a team, please justify your decision.

7. Coaching Services

The services of a coach may be available during the course of your grant. For a description of the role a coach plays, [click here](#). If your organization would be interested in a coach, please respond to the following questions:

Why do you think your organization would benefit from the services of a coach?

What are the particular needs that a coach could help address?

If you have concerns about working with a coach, please indicate them.

Note: If you are not interested in coaching services, please indicate so.

8. Budget Justification

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.

Provide a line item budget for each year of funding.

Provide a narrative justification, with an explanation and calculation of each line item on the budget.

If the project costs more than the amount requested, indicate whether and how much your organization will contribute to the project and/or whether it is seeking funds from other sources. If the balance of funds is not received, indicate how the project will accomplish its objectives with fewer funds or how it will scale back but still accomplish something substantive with less funding.

If your organization is seeking other funds for this project, identify them and indicate the anticipated decision dates.

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9. Future Financial Support

If there are capacity building activities that will require funding to sustain them after the grant ends, indicate how your organization will continue to support them.

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Requirements for Proposal Attachments

Please attach the following items to the original and all copies:

Your organization's current operating budget showing income and expenses.

A line item budget that shows how the organizational capacity building grant will be used (include an explanation of costs in the narrative section – see #8 above).

Most current audit (only one copy required) or financial statements if your organization does not have an audit (only one copy required).

Resume(s) of principal staff to be involved in the project.

If consultant(s) for the project has been ed, include resume(s) and/or information on his/her experience

IRS letter stating 501(c)3 designation

Board list showing names and affiliations

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Cover Sheet

Complete the **cover sheet** ([click here to download](#)) and attach it to the summary of your proposal

Note If the project is a collaboration between or among other organizations, please provide the attachments required for all participating organizations

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The Retirement Research Foundation > Apply > Apply Flexible OCB Funds

Apply: Flexible OCB Funds

RRF's new **Flexible OCB Funds** offer two forms of assistance to eligible nonprofits serving older adults in Chicagoland

OCB Readiness Assessments: Enabling the nonprofit to engage an organizational consultant to help prioritize capacity-building opportunities and identify the best first step(s) toward improved organizational capacity

OCB Targeted Consultations: Helping nonprofits make use of technical assistance consultations for addressing short-term issues related to human resources, legal issues, budgeting, accounting, etc

CONTACT & APPLY

To apply for OCB funding for Readiness Assessments—

Please review the **information sheet** and complete the **flexible application form**

There are no official deadlines, as these funds are accessed through a fast-tracked application process. Generally, funding decisions are made within four to six weeks.

To apply for OCB funding for Targeted Consultations

Please review the **information sheet** and complete the **flexible application form**

For more help and information, please contact

Mary O'Donnell, Program Officer

Phone (773) 714.8080

E-mail info@rrf.org

RELATED LINKS

About OCB Program

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Application Package

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(Please feel free to download and make copies as needed)

Resources

- 1 Download the application form in either Word format or pdf format or call 773 714 8080 to request a copy by mail. After downloading the application form, print it.
- 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 at least 10-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 one set of several "before" photos with the application. These should be printed 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, as well as a description of what the photo represents.
- 5 Provide verification of tax-exempt status by one of the following methods:
 - A Submit a copy of the congregation's 501(c)(3) determination by the IRS, or
 - B If your congregation is part of a larger denomination that is covered by a group ruling, submit 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.
 - C If your congregation is independent and not part of a larger denomination, a signed statement by the principal clergy attesting that your congregation meets the following requirements of the Internal Revenue Code applicable to churches, synagogues, mosques, temples, etc.

It is organized and operated exclusively for religious purposes,

Its net earnings will not inure to the benefit of any private individual or shareholder,

No substantial part of its activities will be used to influence legislation,

It will not intervene in political campaigns, and

Its purpose and activities will not be illegal or violate fundamental public policy.

If you are unclear about this information, you may wish to refer to the IRS tax guide for Churches and Religious Organizations (See <http://www.irs.gov/pub/irs-pdf/p1828.pdf> for complete guide) or discuss this with officials from your denomination's central office. If you have questions about this, you may contact **The Retirement Research Foundation**.

- 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 June 1.

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**RETIREMENT RESEARCH FOUNDATION
CHICAGO, ILLINOIS
FORM 990 PF
DECEMBER 31, 2012
36-2429540**

**GRANTS PAID
ATTACHMENT A
PART XV
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DETAILS TO LINE 3a
Pages 1 through 28**

Grants Paid Year Ended 12/31/12 Attachment "A" with Tax Status

Paid Date is any date between 1/1/2012 and 12/31/2012

5 November 2013

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
<u>AcademyHealth</u>				
2012142	AcademyHealth 1150 17th Street NW Suite 600 Washington, DC 20036	509(a)(1)	Requests \$1,000 over six months to provide a venue for health policy analysts, researchers, and policymakers to focus on long-term care problems affecting access, quality of care, and quality of life.	\$1,000
<i>Total AcademyHealth (1 item)</i>				
<u>AgeOptions, Inc.</u>				
2011265	AgeOptions, Inc. 1048 West Lake Street, Suite 300 Oak Park, Illinois 60301-1102	509(a)(1)	One-year continued support for the Make Medicare Work Coalition.	\$32,500
2011265	AgeOptions, Inc. 1048 West Lake Street, Suite 300 Oak Park, Illinois 60301-1102	509(a)(1)	One-year continued support for the Make Medicare Work Coalition.	\$32,500
2011265	AgeOptions, Inc. 1048 West Lake Street, Suite 300 Oak Park, Illinois 60301-1102	509(a)(1)	One-year continued support for the Make Medicare Work Coalition.	\$50,000
<i>Total AgeOptions, Inc. (3 items)</i>				
<u>Aging Care Connections</u>				
2011235	Aging Care Connections 111 West Harris Avenue La Grange, Illinois 60525	509(a)(1)	One-year grant to plan and launch a capital campaign.	\$49,830
<i>Total Aging Care Connections (1 item)</i>				
<u>Alivio Medical Center, Inc.</u>				
2012043	Alivio Medical Center, Inc. 966 West 21st Street Chicago, Illinois 60608	509(a)(1)	One-year grant to develop and implement a program which trains volunteers to help seniors access available benefits and community resources in four communities.	\$35,000
<i>Total Alivio Medical Center, Inc. (1 item)</i>				

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
<u>Alliance for Aging Research</u>				
2012278	Alliance for Aging Research 750 17th Street, NW Suite 1100 Washington, DC 20006	509(a)(1)	Requests \$30,000 over one year to continue program support	\$30,000
<i>Total Alliance for Aging Research (1 item)</i>				
<u>American Academy of Home Care Physicians</u>				
2011006	American Academy of Home Care Physicians P. O. Box 1037 Edgewood, Maryland 21040-0337	509(a)(1)	One-year grant to improve efficiency and effectiveness of home-based primary care practices serving frail elders.	-\$9,313
2012001	American Academy of Home Care Physicians P. O. Box 1037 Edgewood, Maryland 21040-0337	509(a)(1)	One-year grant for a learning collaborative to assist home care medicine practices with identifying, sharing and implementing best practices for the Independence at Home demonstration project.	\$50,000
<i>Total American Academy of Home Care Physicians (2 items)</i>				
<u>American Geriatrics Society</u>				
2012007	American Geriatrics Society 40 Fulton Street, 18th Floor New York, New York 10038	509(a)(2)	Two-year grant to disseminate up-to-date information to the public and supportive care providers about medications that are dangerous for older adults.	\$45,000
<i>Total American Geriatrics Society (1 item)</i>				
<u>American Psychological Association</u>				
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.	-\$1,000
<i>Total American Psychological Association (1 item)</i>				
<u>Antioch Missionary Baptist Church</u>				
2011150	Antioch Missionary Baptist Church 6248 S. Stewart Avenue Chicago, Illinois 60621	509(a)(1)	Eighteen-month grant to renovate a restroom for accessibility.	-\$2,710

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
<u>Total Antioch Missionary Baptist Church (1 item)</u>				
<u>Asian Health Coalition</u>				
2011197	Asian Health Coalition 180 W. Washington St., Suite 1000 Chicago, Illinois 60602	509(a)(1)	One-year grant to develop and implement a linguistically and culturally competent colorectal cancer prevention program targeting older Korean-Americans.	\$30,000
<u>Total Asian Health Coalition (1 item)</u>				\$30,000
<u>Baylor College of Medicine</u>				
2011276	Baylor College of Medicine One Baylor Plaza Houston, Texas 77030	509(a)(1)	Requests \$111,182 over two years to implement and pilot-test an intervention to address late life anxiety.	\$52,134
<u>Total Baylor College of Medicine (1 item)</u>				\$52,134
<u>Benedictine Sisters of Chicago-St. Scholastica Monastery</u>				
2011254	Benedictine Sisters of Chicago-St. Scholastica Monastery 7430 North Ridge Boulevard Chicago, Illinois 60645-1913	509(a)(1)	Six-month grant to evaluate resource development practices, improve development infrastructure, and increase donor revenue.	\$35,500
<u>Total Benedictine Sisters of Chicago-St. Scholastica Monastery (1 item)</u>				\$35,500
<u>Bethel New Life, Inc.</u>				
2012045	Bethel New Life, Inc. 4950 W. Thomas Street Chicago, Illinois 60651	509(a)(1)	Requests \$20,000 over one year to expand adult day service activities in an underserved area of Chicago.	\$20,000
<u>Total Bethel New Life, Inc. (1 item)</u>				\$20,000
<u>Boca Raton Regional Hospital Foundation, Inc</u>				
2012282	Boca Raton Regional Hospital Foundation, Inc 745 Meadows Road Boca Raton, Florida 33486	509(a)(1)	Requests \$14,000 over one year to improve the quality of care and patient outcomes for senior patients in the emergency department	\$14,000
<u>Total Boca Raton Regional Hospital Foundation, Inc (1 item)</u>				\$14,000
<u>EIN 36-2429540 Retirement Research Foundation</u>				

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Brown University				
2011066	Brown University 164 Angell Street, Box 1929 Providence, Rhode Island 02912	509(a)(1)	One-year grant for research on the prevalence and impact of billing Medicare beneficiary stays as outpatient observation.	\$35,710
2011066	Brown University 164 Angell Street, Box 1929 Providence, Rhode Island 02912	509(a)(1)	One-year grant for research on the prevalence and impact of billing Medicare beneficiary stays as outpatient observation.	-\$1,017
2011266	Brown University 164 Angell Street, Box 1929 Providence, Rhode Island 02912	509(a)(1)	Three year grant to evaluate toward objectives of RRF Initiative to supporting national expansion of the 'Physicians Orders for Life-Sustaining Treatment' paradigm.	\$20,000
<i>Total Brown University (3 items)</i>				<u>\$54,693</u>
Caring Connections for Seniors				
2012036	Caring Connections for Seniors 1545 W. Morse Avenue Chicago, Illinois 60626	509(a)(1)	Six-month grant for consultation services to improve volunteer management.	\$3,500
<i>Total Caring Connections for Seniors (1 item)</i>				<u>\$3,500</u>
Center for Disability and Elder Law, Inc.				
2012105	Center for Disability and Elder Law, Inc. 79 West Monroe Street, Suite 919 Chicago, Illinois 60603	509(a)(1)	Requests \$28,500 over one year to purchase and implement a new management information system.	\$28,500
<i>Total Center for Disability and Elder Law, Inc. (1 item)</i>				<u>\$28,500</u>
Center of Concern				
2012128	Center of Concern 1580 N. Northwest Highway, Suite 310 Park Ridge, Illinois 60068-1469	509(a)(1)	Requests a \$48,180 organizational capacity building grant over nine months to develop and begin implementation of a strategic fundraising plan.	\$25,000
<i>Total Center of Concern (1 item)</i>				<u>\$25,000</u>

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Center on Halsted				
2012060	Center on Halsted 3656 North Halsted Street Chicago, Illinois 60613	509(a)(1)	Requests \$30,000 in second-year funding to continue the HomeSharing Program matching older adult home-sharers with home-seekers who pay low rent and do chores in exchange for housing.	\$30,000
<i>Total Center on Halsted (1 item)</i>				
Chicago Alliance to End Homelessness				
2011225	Chicago Alliance to End Homelessness 651 West Washington Street, Suite 504 Chicago, Illinois 60661	509(a)(1)	One-year continuation grant for an initiative improving the system of resources and services for homeless elders. Subsequently declined in June, 2012 due to the organization changing its mission because of a merger with another organization and also due to a change in the goals for this project.	-\$50,000
2011225	Chicago Alliance to End Homelessness 651 West Washington Street, Suite 504 Chicago, Illinois 60661	509(a)(1)	One-year continuation grant for an initiative improving the system of resources and services for homeless elders. Subsequently declined in June, 2012 due to the organization changing its mission because of a merger with another organization and also due to a change in the goals for this project.	\$50,000
<i>Total Chicago Alliance to End Homelessness (2 items)</i>				
Chicago Commons Association				
2012074	Chicago Commons Association 515 E. 50th Street, Suite 200 Chicago, Illinois 60615	509(a)(1)	Six month grant to address information management and take steps toward creating a data driven culture within the organization.	\$5,000
<i>Total Chicago Commons Association (1 item)</i>				
Chinese American Service League, Inc.				
2011194	Chinese American Service League, Inc. 2141 South Tan Court Chicago, Illinois 60616	509(a)(1)	One-year grant continuation grant to implement the Chinese-language version of Healthy IDEAS for depression screening and intervention of 400 Chinese seniors.	\$35,000

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
<u>Total Chinese American Service League, Inc. (1 item)</u>				
<u>Christian Appalachian Project, Inc.</u>				
2012058	Christian Appalachian Project, Inc. 2610 Palumbo Drive Lexington, Kentucky 40509	509(a)(2)	Requests \$35,000 over six months to complete home repairs for at-risk seniors in eastern Kentucky. [Varey discr last time]	\$35,000
<u>Total Christian Appalachian Project, Inc (1 item)</u>				
<u>Community Harvest Food Bank of Northeast Indiana, Inc.</u>				
2011218	Community Harvest Food Bank of Northeast Indiana, Inc. 999 East Tillman Road P.O. Box 10967 Fort Wayne, Indiana 46855-0967	509(a)(1)	One-year grant to support home-delivered groceries to more than 1,000 low-income, homebound seniors.	\$25,000
<u>Total Community Harvest Food Bank of Northeast Indiana, Inc. (1 item)</u>				
<u>Concordia Place</u>				
2012097	Concordia Place 3300 North Whipple Chicago, Illinois 60618	509(a)(1)	Requests \$21,445 over one year to expand senior wellness activities on Chicago's Northwest side.	\$21,445
<u>Total Concordia Place (1 item)</u>				
<u>Council for Jewish Elderly</u>				
2011214	Council for Jewish Elderly 3003 West Touhy Avenue Chicago, Illinois 60645	509(a)(1)	One-year grant to provide social work/care management services to 1) enhance high-risk elders' transition from hospital settings to home or sub-acute care and 2) avoid re-hospitalization.	\$45,000
<u>Total Council for Jewish Elderly (1 item)</u>				
<u>Council on Aging of Martin County, Inc.</u>				
2011229	Council on Aging of Martin County, Inc. 900 SE Salerno Road Stuart, Florida 34997	509(a)(1)	One-year grant to create a model geriatric specialty clinic located within a senior center.	\$50,000

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
2011229	Council on Aging of Martin County, Inc. 900 SE Salerno Road Stuart, Florida 34997	509(a)(1)	One-year grant to create a model geriatric specialty clinic located within a senior center.	\$50,000
2011229	Council on Aging of Martin County, Inc. 900 SE Salerno Road Stuart, Florida 34997	509(a)(1)	One-year grant to create a model geriatric specialty clinic located within a senior center.	\$31,440
<i>Total Council on Aging of Martin County, Inc. (3 items)</i>				<u>\$131,440</u>
<u>Council on Foundations</u>				
2012010	Council on Foundations 2121 Crystal Drive, Suite 700 Arlington, Virginia 22202	509(a)(1)	One-year grant for 2012 program support.	\$12,800
<i>Total Council on Foundations (1 item)</i>				<u>\$12,800</u>
<u>Council on Social Work Education</u>				
2012070	Council on Social Work Education 1701 Duke Street, Suite 200 Alexandria, Virginia 22314	509(a)(2)	Requests \$77,484 over 18 months to prepare the Aging Network workforce in the areas of gerontology cultural competence, person-centered care, and participant direction.	\$28,673
2012070	Council on Social Work Education 1701 Duke Street, Suite 200 Alexandria, Virginia 22314	509(a)(2)	Requests \$77,484 over 18 months to prepare the Aging Network workforce in the areas of gerontology cultural competence, person-centered care, and participant direction.	\$48,811
<i>Total Council on Social Work Education (2 items)</i>				<u>\$77,484</u>
<u>Dental Lifeline Network - Illinois</u>				
2010091	Dental Lifeline Network - Illinois P.O. Box 211 Northbrook, Illinois 60065	509(a)(2)	One-year grant to replace a van that transports portable dental equipment required to deliver oral health to frail elders and persons with disabilities.	-\$2,783
<i>Total Dental Lifeline Network - Illinois (1 item)</i>				<u>-\$2,783</u>
<u>Donors Forum</u>				
2012015	Donors Forum 208 South LaSalle Street, Suite 1540 Chicago, Illinois 60604	509(a)(1)	One-year grant for 2012 program support.	\$11,490

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
<i>Total Donors Forum (1 item)</i>				
<u>DuPage Senior Citizens Council</u>				
2010196	DuPage Senior Citizens Council 1919 South Highland Avenue Building A, Suite 210 Lombard, Illinois 60148	509(a)(1)	One-year grant to build capacity for resource development.	\$11,490
<i>Total DuPage Senior Citizens Council (1 item)</i>				
<u>Easter Seals, National Office</u>				
2011252	Easter Seals, National Office 233 S. Wacker Drive, Suite 2400 Chicago, Illinois 60606	509(a)(2)	Two-year grant for a training program to transform the culture of adult day services to deliver person-centered care.	-\$8,840
2011252	Easter Seals, National Office 233 S. Wacker Drive, Suite 2400 Chicago, Illinois 60606	509(a)(2)	Two-year grant for a training program to transform the culture of adult day services to deliver person-centered care.	\$37,212
2011252	Easter Seals, National Office 233 S. Wacker Drive, Suite 2400 Chicago, Illinois 60606	509(a)(2)	Two-year grant for a training program to transform the culture of adult day services to deliver person-centered care.	\$37,200
<i>Total Easter Seals, National Office (3 items)</i>				
<u>Escorted Transportation Service Northwest</u>				
2012050	Escorted Transportation Service Northwest 1801 West Central Road Arlington Heights, Illinois 60005	509(a)(1)	Requests \$3,000 over six months for an assessment to identify and prioritize areas of growth in organizational capacity building.	\$111,612
<i>Total Escorted Transportation Service Northwest (1 item)</i>				
<u>Eskenazi Health Foundation Inc</u>				
2011231	Eskenazi Health Foundation Inc 1001 W. Tenth Street Indianapolis, Indiana 46202	509(a)(3)	One-year grant to continue and expand a volunteer guardianship program protecting health, well-being, and safety of isolated decisionally-incapable ill seniors.	\$3,000
2011231	Eskenazi Health Foundation Inc 1001 W. Tenth Street Indianapolis, Indiana 46202	509(a)(3)	One-year grant to continue and expand a volunteer guardianship program protecting health, well-being, and safety of isolated decisionally-incapable ill seniors.	\$50,000
<i>Total Eskenazi Health Foundation Inc (2 items)</i>				
<i>Total Escorted Transportation Service Northwest (1 item)</i>				
<i>Total Eskenazi Health Foundation Inc (2 items)</i>				
<i>Total Escorted Transportation Service Northwest (1 item)</i>				
<i>Total Eskenazi Health Foundation Inc (2 items)</i>				

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
<u>Family Service Madison, Inc.</u>				
2012136	Family Service Madison, Inc. 128 East Olin Avenue Madison, Wisconsin 53713	509(a)(1)	Requests \$20,000 over one year to introduce PEARLS, an evidence-based program to treat older persons with minor depression.	\$20,000
<u>Total Family Service Madison, Inc. (1 item)</u>				
				\$20,000
<u>Florida Atlantic University</u>				
2010096	Florida Atlantic University 777 Glades Rd. Boca Raton, Florida 33431-0991	509(a)(1)	One-year grant to further develop and evaluate a distance-learning curriculum for nursing home professional staff to help reduce unnecessary transfer of residents to acute care hospitals.	-\$15
2012283	Florida Atlantic University 777 Glades Rd. Boca Raton, Florida 33431-0991	509(a)(1)	Requests \$39,993 over one year to conduct an exploratory study of the lifestyle factors associated with poorly controlled Type 2 Diabetes in older Afro-Caribbeans in South Florida.	\$39,993
<u>Total Florida Atlantic University (2 items)</u>				
				\$39,978
<u>Grace Lutheran Church of La Grange</u>				
2012145	Grace Lutheran Church of La Grange 200 N. Catherine Avenue La Grange, Illinois 60525		Requests \$30,000 over 18 months to install an elevator and to renovate restrooms for accessibility.	\$30,000
<u>Total Grace Lutheran Church of La Grange (1 item)</u>				
				\$30,000
<u>GRANDFamilies Program of Chicago</u>				
2012146	GRANDFamilies Program of Chicago 455 West 79th Street Chicago, Illinois 60620	509(a)(1)	Requests \$5,000 over six months to receive technical assistance for expanding the organization's donor base.	\$5,000
<u>Total GRANDFamilies Program of Chicago (1 item)</u>				
				\$5,000
<u>Grantmakers in Aging</u>				
2012071	Grantmakers in Aging 2001 Jefferson Davis Highway, Suite 504 Arlington, Virginia 22202	509(a)(1)	Requests \$15,000 over one year to support programs and activities, including a new database on aging philanthropy, two webinars, and an annual conference.	\$15,000

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
<u>Total Grantmakers in Aging (1 item)</u>				
<u>Grantmakers in Health</u>				
2012280	Grantmakers in Health 1100 Connecticut Ave., N.W., Suite 1200 Washington, DC 20036	509(a)(1)	Requests \$2500 over one year for 2012 Program Support	\$15,000
<u>Total Grantmakers in Health (1 item)</u>				
<u>Greater Chicago Food Depository</u>				
2012044	Greater Chicago Food Depository 4100 West Ann Lurie Place Chicago, Illinois 60632	509(a)(1)	One-year challenge grant to improve and expand a program for seniors that provides access to nutritious food, information and enrollment assistance related to SNAP, and opportunities to participate in healthy cooking demonstrations.	\$75,000
<u>Total Greater Chicago Food Depository (1 item)</u>				
<u>Hands On Suburban Chicago</u>				
2011277	Hands On Suburban Chicago 2121 South Goebbert Road Arlington Heights, Illinois 60005	509(a)(1)	Requests \$45,000 over one year to build the organization's capacity for effective marketing and outreach.	\$35,000
<u>Total Hands On Suburban Chicago (1 item)</u>				
<u>Hanul Family Alliance</u>				
2011273	Hanul Family Alliance 5008 North Kedzie Avenue Chicago, Illinois 60625	509(a)(1)	Requests \$47,775 over one year to build the organization's capacity for effective human resource practices and management.	\$40,000
<u>Total Hanul Family Alliance (1 item)</u>				
<u>HealthCare Chaplaincy, Inc.</u>				
2011083	HealthCare Chaplaincy, Inc. 307 East 60th Street New York, New York 10022-1505	509(a)(2)	One-year grant supporting creation of training program to prepare chaplains for national certification in palliative care.	\$37,500
<u>Total HealthCare Chaplaincy, Inc (1 item)</u>				

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Hearth, Inc.				
2012072	Hearth, Inc. 1640 Washington Street Boston, Massachusetts 02118	509(a)(1)	Requests \$27,335 over one year to continue a national project working to raise awareness about elder homelessness and solutions to address the issue.	\$27,335
<i>Total Hearth, Inc. (1 item)</i>				
<u>Horizon Hospice & Palliative Care</u>				
2011246	Horizon Hospice & Palliative Care 833 West Chicago Avenue Chicago, Illinois 60622	509(a)(1)	One-year grant to educate all staff at Rush University Medical Center about hospice care to assure success of new in-patient hospice unit at Rush.	\$30,192
2011246	Horizon Hospice & Palliative Care 833 West Chicago Avenue Chicago, Illinois 60622	509(a)(1)	One-year grant to educate all staff at Rush University Medical Center about hospice care to assure success of new in-patient hospice unit at Rush.	\$30,000
<i>Total Horizon Hospice & Palliative Care (2 items)</i>				
<u>Illinois Pioneer Coalition</u>				
2011272	Illinois Pioneer Coalition 639 York Street Quincy, Illinois 62301	509(a)(2)	Requests \$40,000 over 18 months to raise awareness of person-centered care by pilot testing a consumer culture change education program in four regions of Illinois.	\$20,000
<i>Total Illinois Pioneer Coalition (1 item)</i>				
<u>Independent Living Community Services, Inc.</u>				
2010200	Independent Living Community Services, Inc. 5201 Blue Lagoon Drive, #270 Miami, Florida 33126	509(a)(2)	One year grant to continue and expand the Matter of Balance falls prevention program for 300 Miami-Dade English and Spanish-speaking seniors.	-\$5,073
<i>Total Independent Living Community Services, Inc. (1 item)</i>				
<u>International Honor Society of Nursing Foundation</u>				
2011219	International Honor Society of Nursing Foundation 550 W. North Street Indianapolis, Indiana 46202	509(a)(1)	Two-year grant to train and support nurses for leadership and improved care delivery in geniatric settings.	\$76,063
<i>Total International Honor Society of Nursing Foundation (1 item)</i>				

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
<u>Jane Addams Senior Caucus</u>				
2012012	Jane Addams Senior Caucus 1111 N. Wells Street, Suite 302 Chicago, Illinois 60610	509(a)(1)	Fourteen-month grant to support the Aging Justice Program, which provides intensive training and prepares older women and their allies to advocate for issues relevant to Illinois' elders.	\$30,000
<i>Total Jane Addams Senior Caucus (1 item)</i>				\$30,000
<u>Japanese American Service Committee</u>				
2012030	Japanese American Service Committee 4427 North Clark Street Chicago, Illinois 60640	509(a)(2)	One-year grant to develop a strategic plan to guide the organization's work in the coming years.	\$15,000
<i>Total Japanese American Service Committee (1 item)</i>				\$15,000
<u>Jewish Vocational Service and Employment Center</u>				
2012006	Jewish Vocational Service and Employment Center 216 West Jackson Blvd., Suite 700 Chicago, Illinois 60606-6921	509(a)(1)	One-year grant to provide job readiness skill training for seniors and help them secure unsubsidized employment.	\$35,000
<i>Total Jewish Vocational Service and Employment Center (1 item)</i>				\$35,000
<u>Joan & Sanford I. Weill Medical College of Cornell University</u>				
2012066	Joan & Sanford I. Weill Medical College of Cornell University Cornell University 1300 York Avenue New York, New York 10065	509(a)(1)	Requests \$25,000 over one year to restore an interactive component to a successful website for caregivers caring for their loved ones at home with Alzheimer's disease or related dementia.	\$25,000
<i>Total Joan & Sanford I. Weill Medical College of Cornell University (1 item)</i>				\$25,000
<u>Korean American Community Services</u>				
2011202	Korean American Community Services 4300 North California Avenue Chicago, Illinois 60618-1514	509(a)(2)	One-year grant to recruit and train older Korean-American volunteers to assist other Korean elders through community outreach, facilitating educational sessions, and enrolling eligible elders in public benefits programs.	\$35,000
<i>Total Korean American Community Services (1 item)</i>				\$35,000

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
<u>Lac Courte Oreilles Band of the Lake Superior Chippewa</u>				
2012122	Lac Courte Oreilles Band of the Lake Superior Chippewa 13394 West Trepania Road Hayward, Wisconsin 54843		Requests \$26,000 over one year to develop a plan for long-term care options for elders in this Native American community. [please see note in final report requirements. jek]	\$26,000
<i>Total Lac Courte Oreilles Band of the Lake Superior Chippewa (1 item)</i>				
				\$26,000
<u>Laity in Support of Retired Priests, Inc.</u>				
2012121	Laity in Support of Retired Priests, Inc. P.O. Box 1019 Bonita Springs, Florida 34133	509(a)(1)	Requests \$60,000 over one year to acquire new and updated information about the retirement needs of diocesan priests and develop programs to address them.	\$60,000
<i>Total Laity in Support of Retired Priests, Inc. (1 item)</i>				
				\$60,000
<u>Latino Alzheimer's and Memory Disorders Alliance</u>				
2012033	Latino Alzheimer's and Memory Disorders Alliance 4327 N. Ottawa Avenue Norridge, Illinois 60706	509(a)(1)	One-year grant to conduct a caregiver support program for Latinos whose loved ones have Alzheimer's disease.	\$10,000
<i>Total Latino Alzheimer's and Memory Disorders Alliance (1 item)</i>				
				\$10,000
<u>Legal Aid Society of Palm Beach County, Inc.</u>				
2011193	Legal Aid Society of Palm Beach County, Inc. 423 Fern Street, Suite 200 West Palm Beach, Florida 33401	509(a)(2)	One year challenge grant to provide legal services protecting low-income older adults from foreclosure and financial exploitation.	\$25,000
<i>Total Legal Aid Society of Palm Beach County, Inc. (1 item)</i>				
				\$25,000
<u>Lincoln Park Village, Inc.</u>				
2012281	Lincoln Park Village, Inc. 2502 N. Clark Street, #225 Chicago, Illinois 60614	509(a)(2)	Requests \$15,000 over one year to provide access to programs, services, and activities for vulnerable elders of modest means	\$15,000
<i>Total Lincoln Park Village, Inc. (1 item)</i>				
				\$15,000

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
<u>Little Sisters of the Poor, St. Joseph's Home for the Elderly</u>				
2012137	Little Sisters of the Poor, St. Joseph's Home for the Elderly 80 West Northwest Highway Palatine, Illinois 60067	509(a)(1)	Requests \$71,000 over three months for life safety upgrades in an assisted living facility.	\$71,000
<i>Total Little Sisters of the Poor, St. Joseph's Home for the Elderly (1 item)</i>				
<u>Lyric Opera of Chicago</u>				
2012016	Lyric Opera of Chicago 20 North Wacker Drive, Suite 860 Chicago, Illinois 60606	509(a)(1)	One-year grant for the 2012 Senior Matinee performance of Donizetti's "Don Pasquale."	\$10,000
<i>Total Lyric Opera of Chicago (1 item)</i>				
<u>Mayo Clinic Rochester</u>				
2011192	Mayo Clinic Rochester 200 First Street SW Rochester, Minnesota 55905	509(a)(2)	One-year grant to study precursors and consequences of leptin signaling in immunosenescence.	\$50,000
2011192	Mayo Clinic Rochester 200 First Street SW Rochester, Minnesota 55905	509(a)(2)	One-year grant to study precursors and consequences of leptin signaling in immunosenescence.	\$49,988
<i>Total Mayo Clinic Rochester (2 items)</i>				
<u>Mental Health Association of New York City, Inc.</u>				
2011042	Mental Health Association of New York City, Inc. 50 Broadway, 19th Floor New York, New York 10004	509(a)(1)	One-year grant to provide technical assistance to multiple states working toward effective advocacy for geriatric mental health services.	\$37,500
<i>Total Mental Health Association of New York City, Inc. (1 item)</i>				
<u>Muslim Women Resource Center</u>				
2012017	Muslim Women Resource Center 6445 N. Western Ave. Suite 301 Chicago, Illinois 60645	509(a)(1)	One-year grant in support of programs that serve elderly refugees from Africa, South Asia, and the Middle East.	\$29,865
<i>Total Muslim Women Resource Center (1 item)</i>				

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
National Able Network				
2011044	National Able Network 567 W. Lake Street, Suite 1150 Chicago, Illinois 60661-1405	509(a)(1)	One-year grant to expand employment and counseling services to low-income seniors.	\$26,000
2012039	National Able Network 567 W. Lake Street, Suite 1150 Chicago, Illinois 60661-1405	509(a)(1)	One-year grant to provide employment training and counseling for low-income older adults.	\$21,498
<i>Total National Able Network (2 items)</i>				\$47,498
National Center for State Courts				
2011115	National Center for State Courts 300 Newport Avenue Williamsburg, Virginia 23185-4147	509(a)(1)	Two-year continuing grant providing resources on aging issues, elder abuse, and guardianship to state judges and court personnel.	\$59,849
2011115	National Center for State Courts 300 Newport Avenue Williamsburg, Virginia 23185-4147	509(a)(1)	Two-year continuing grant providing resources on aging issues, elder abuse, and guardianship to state judges and court personnel.	\$66,905
<i>Total National Center for State Courts (2 items)</i>				\$126,754
National Committee for Responsive Philanthropy (NCRP)				
2012178	National Committee for Responsive Philanthropy (NCRP) 1331 H Street, N.W., Suite 200 Washington, DC 20005	509(a)(2)	Requests \$15,000 over one year for annual membership	\$15,000
<i>Total National Committee for Responsive Philanthropy (NCRP) (1 item)</i>				\$15,000
National Consumer Voice for Quality Long-Term Care				
2012019	National Consumer Voice for Quality Long-Term Care 1001 Connecticut Avenue Suite 425 Washington, DC 20036	509(a)(1)	Eighteen-month grant to develop the first comprehensive online clearinghouse of information on long-term care targeted to advocates, consumers, and their families.	\$16,666
<i>Total National Consumer Voice for Quality Long-Term Care (1 item)</i>				\$16,666

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
<u>National Council on Aging, Inc.</u>				
2011132	National Council on Aging, Inc. 1901 L Street, N.W., 4th Floor Washington, DC 20036	509(a)(2)	Three-year special initiative to enhance the development of a new comprehensive model of assisting older adults to become more economically secure by creating, testing, and evaluating new technology tools for service providers and consumers.	\$196,500
2011132	National Council on Aging, Inc. 1901 L Street, N.W., 4th Floor Washington, DC 20036	509(a)(2)	Three-year special initiative to enhance the development of a new comprehensive model of assisting older adults to become more economically secure by creating, testing, and evaluating new technology tools for service providers and consumers.	\$196,500
<i>Total National Council on Aging, Inc. (2 items)</i>				<u>\$393,000</u>
<u>National People's Action</u>				
2011223	National People's Action 810 North Milwaukee Avenue Chicago, Illinois 60642	509(a)(2)	One-year grant for an advocacy campaign to end predatory payday lending practices targeting senior citizens.	\$45,000
<i>Total National People's Action (1 item)</i>				<u>\$45,000</u>
<u>Nehemiah Christian Center Ministries</u>				
2012152	Nehemiah Christian Center Ministries 15215 Center Avenue Harvey, Illinois 60426	509(a)(1)	Requests \$6,775 over 18 months to replace six existing heavy, inaccessible doors with automatic entry doors and install safety cameras.	\$6,775
<i>Total Nehemiah Christian Center Ministries (1 item)</i>				<u>\$6,775</u>
<u>Northwest Side Housing Center</u>				
2012184	Northwest Side Housing Center 5007 W. Addison Street Chicago, Illinois 60641	509(a)(1)	Requests \$5,000 over six months to receive targeted consultation services for improved online communication and website development.	\$5,000
<i>Total Northwest Side Housing Center (1 item)</i>				<u>\$5,000</u>

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
<u>Northwestern University</u>				
2011114	Northwestern University Office of Sponsored Research 633 Clark St. Evanston, Illinois 60208	509(a)(1)	Eighteen-month grant to study the impact of mindfulness training on well-being of persons with early-stage Alzheimer's disease and their caregivers.	\$54,491
<i>Total Northwestern University (1 item)</i>				
<u>Norwegian Lutheran Bethesda Home</u>				
2011211	Norwegian Lutheran Bethesda Home 2833 North Nordica Avenue Chicago, Illinois 60634-9968	509(a)(1)	One-year grant to develop and implement planned giving.	\$12,400
<i>Total Norwegian Lutheran Bethesda Home (1 item)</i>				
<u>Norwood Life Society</u>				
2012078	Norwood Life Society 6016 N. Nina Avenue Chicago, Illinois 60631	509(a)(2)	Requests \$3,500 over six months to receive short-term consultation services on improved volunteer management.	\$3,500
<i>Total Norwood Life Society (1 item)</i>				
<u>Notre Dame Law School</u>				
2012147	Notre Dame Law School 1150 Eck Hall of Law Notre Dame, Indiana 46556-4639	509(a)(1)	A \$75,000 gift to the Notre Dame Law School to establish in honor of Edward J. Kelly an on-going, annual memorial lecture and student writing award in the field of aging.	\$75,000
<i>Total Notre Dame Law School (1 item)</i>				
<u>Nova Southeastern University</u>				
2012038	Nova Southeastern University 3301 College Avenue Fort Lauderdale, Florida 33314	509(a)(1)	Eighteen month grant for research on a non-pharmacologic intervention which would be managed by family caregivers to improve sleep in persons with dementia.	\$45,422
<i>Total Nova Southeastern University (1 item)</i>				

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
<u>NU-HOPE Elder Care Services, Inc.</u>				
2012059	NU-HOPE Elder Care Services, Inc. 6414 US Highway 27 South Sebring, Florida 33876	509(a)(1)	Requests \$35,000 over one year for a program providing nutritious food and support to vulnerable older adults immediately after their transition from the hospital back to their home.	\$35,000
<i>Total NU-HOPE Elder Care Services, Inc. (1 item)</i>				<u>\$35,000</u>
<u>Oak Lawn Bible Church</u>				
2011127	Oak Lawn Bible Church 9435 S. 54th Avenue Oak Lawn, Illinois 60453	509(a)(1)	Eighteen-month grant to replace obsolete vertical platform lift.	-\$5,417
<i>Total Oak Lawn Bible Church (1 item)</i>				<u>-\$5,417</u>
<u>Oregon Health & Science University Foundation</u>				
2011070	Oregon Health & Science University Foundation 1121 SW Salmon Street, Suite 100 Portland, Oregon 97205	509(a)(1)	Three-year special initiative to advance end-of-life care by catalyzing the spread of POLST (Physician Orders for Life Sustaining Treatment) across the United States through small grants, technical assistance and national program office support.	\$185,835
<i>Total Oregon Health & Science University Foundation (1 item)</i>				<u>\$185,835</u>
<u>Pension Rights Center</u>				
2012009	Pension Rights Center 1350 Connecticut Avenue, NW, Suite 206 Washington, DC 20036-1739	509(a)(1)	One-year grant to provide training and technical assistance to regional Pension Counseling and Information projects across the country.	\$40,000
2012009	Pension Rights Center 1350 Connecticut Avenue, NW, Suite 206 Washington, DC 20036-1739	509(a)(1)	One-year grant to provide training and technical assistance to regional Pension Counseling and Information projects across the country.	\$35,000
<i>Total Pension Rights Center (2 items)</i>				<u>\$75,000</u>
<u>Personal Assistance Telephone Help, Inc.</u>				
2011257	Personal Assistance Telephone Help, Inc. 201 E. Grove Street, Suite 200 Bloomington, Illinois 61701	509(a)(1)	Two-year grant to create self-neglect response system for older adults in McLean County, Illinois.	\$29,746
<i>Total Personal Assistance Telephone Help, Inc. (1 item)</i>				<u>\$29,746</u>

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
<u>Pillars Community Services</u>				
2011017	Pillars Community Services 333 North LaGrange Road Suite One LaGrange Park, Illinois 60526	509(a)(2)	One-year grant to replicate PEARLS, a model program designed to reduce depressive symptoms among older adults.	\$27,500
<i>Total Pillars Community Services (1 item)</i>				
<u>Pioneer Network in Culture Change</u>				
2011090	Pioneer Network in Culture Change 35 E. Wacker Drive, Suite 850 Chicago, Illinois 60601	509(a)(2)	Eighteen-month grant to promote the use of MDS3 resident preference data for enabling long-term care culture change.	\$89,375
2011090	Pioneer Network in Culture Change 35 E. Wacker Drive, Suite 850 Chicago, Illinois 60601	509(a)(2)	Eighteen-month grant to promote the use of MDS3 resident preference data for enabling long-term care culture change.	\$89,375
<i>Total Pioneer Network in Culture Change (2 items)</i>				
<u>Prairie State Legal Services, Inc.</u>				
2012088	Prairie State Legal Services, Inc. 303 North Main Street, Suite 600 Rockford, Illinois 61101	509(a)(1)	One-year grant to support a helpline to address the legal service needs of low-income older persons.	\$32,000
<i>Total Prairie State Legal Services, Inc. (1 item)</i>				
<u>Provena Mercy Medical Center</u>				
2011215	Provena Mercy Medical Center 1325 N. Highland Avenue Aurora, Illinois 60119	509(a)(1)	One-year grant supporting an Advanced Practice Nurse providing program care coordination to persons with dementia and their caregivers.	\$34,962
<i>Total Provena Mercy Medical Center (1 item)</i>				
<u>Rainbow Hospice and Palliative Care</u>				
2011023	Rainbow Hospice and Palliative Care 1550 Bishop Court Mount Prospect, Illinois 60056	509(a)(1)	Three-year grant to build capacity of four nursing homes for persons with advanced dementia, and develop a self-sustaining, specialized dementia care program.	\$51,955

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
2011023	Rainbow Hospice and Palliative Care 1550 Bishop Court Mount Prospect, Illinois 60056	509(a)(1)	Three-year grant to build capacity of four nursing homes for persons with advanced dementia, and develop a self-sustaining, specialized dementia care program.	\$51,955
<i>Total Rainbow Hospice and Palliative Care (2 items)</i>				\$103,910
<u>Ravenswood Evangelical Covenant Church</u>				
2012169	Ravenswood Evangelical Covenant Church 4900 N. Damen Avenue Chicago, Illinois 60625	509(a)(1)	Eighteen-month grant to replace components and electronics for existing non-functioning elevator.	\$16,000
<i>Total Ravenswood Evangelical Covenant Church (1 item)</i>				\$16,000
<u>RCCG Jesus House Chicago</u>				
2012172	RCCG Jesus House Chicago 4332 N. Kedzie Avenue Chicago, Illinois 60618	509(a)(1)	Requests \$30,000 over 18 months to install a LULA elevator.	\$30,000
<i>Total RCCG Jesus House Chicago (1 item)</i>				\$30,000
<u>Rehabilitation Institute of Chicago</u>				
2011027	Rehabilitation Institute of Chicago 345 East Superior Street Chicago, Illinois 60611	509(a)(1)	Three-year grant for on-line database to assist rehabilitation clinicians working with older adult patients.	\$49,273
<i>Total Rehabilitation Institute of Chicago (1 item)</i>				\$49,273
<u>Rush University Medical Center</u>				
2011123	Rush University Medical Center 1700 W. Van Buren, Suite 250 Chicago, Illinois 60612	509(a)(1)	Two-year grant to address older adult substance abuse and medication misuse with an intervention and education protocol.	\$45,774
<i>Total Rush University Medical Center (1 item)</i>				\$45,774
<u>Ruth Rales Jewish Family Service of South Palm Beach County, Inc.</u>				
2012215	Ruth Rales Jewish Family Service of South Palm Beach County, Inc. 21300 Ruth & Baron Coleman Boulevard Boca Raton, Florida 33428-1757	509(a)(1)	Requests \$25,000 over one year to expand volunteer transportation service for isolated older Floridians who cannot drive.	\$25,000
<i>Total Ruth Rales Jewish Family Service of South Palm Beach County, Inc (1 item)</i>				\$25,000

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
<u>Saint Aloysius Catholic Church</u>				
2012284	Saint Aloysius Catholic Church 2300 West LeMoyné Street Chicago, Illinois 60622	509(a)(1)	Requests \$30,000 over one year to provide social, health, and spiritual programs to diverse elders in Chicago's Wicker Park, Humboldt Park, and Bucktown neighborhoods.	\$30,000
<i>Total Saint Aloysius Catholic Church (1 item)</i>				
<u>Saint Anthony Hospital Foundation</u>				
2012029	Saint Anthony Hospital Foundation 2875 West 19th Street Chicago, Illinois 60623	509(a)(1)	One-year grant to support the Senior Wellness Program for Spanish-speaking older adults.	\$15,000
<i>Total Saint Anthony Hospital Foundation (1 item)</i>				
<u>Saint Frances of Rome Parish</u>				
2012168	Saint Frances of Rome Parish 1428 S. 59th Court Cicero, Illinois 60804	509(a)(1)	Requests \$30,000 over 18 months to install an inclined platform lift at one entrance and adapt an existing freight elevator into a passenger elevator.	\$30,000
<i>Total Saint Frances of Rome Parish (1 item)</i>				
<u>Saint James Catholic Church</u>				
2012170	Saint James Catholic Church 2907 South Wabash Chicago, Illinois 60616	509(a)(1)	Requests \$30,000 over 18 months to install a platform lift.	\$30,000
<i>Total Saint James Catholic Church (1 item)</i>				
<u>Saint John Berchmans Parish</u>				
2012143	Saint John Berchmans Parish 2517 West Logan Boulevard Chicago, Illinois 60647	509(a)(1)	Requests \$30,000 over 18 months to renovate men's and women's restrooms in lower level Parish Hall for accessibility.	\$30,000
<i>Total Saint John Berchmans Parish (1 item)</i>				
<u>Saint Louis de Monfort Parish</u>				
2012165	Saint Louis de Monfort Parish 8808 S. Ridgeland Avenue Oak Lawn, Illinois 60453	509(a)(1)	Requests \$7,155.50 over one year to install an assistive listening system.	\$7,156

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
<i>Total Saint Louis de Monfort Parish (1 item)</i>				
<u>Saint Louis University</u>				
2010122	Saint Louis University 221 N. Grand Boulevard St. Louis, Missouri 63103	509(a)(1)	One-year grant to develop and deliver a training curriculum on mobility counseling for providers of aging services.	\$7,156
<i>Total Saint Louis University (1 item)</i>				
<u>Saint Mary's Parish</u>				
2012080	Saint Mary's Parish 140 N. Oakwood Avenue West Chicago, Illinois 60185	509(a)(1)	One-year grant to continue a Parish Nursing program serving Latino elders.	-\$515
<i>Total Saint Mary's Parish (1 item)</i>				
<u>Saint Philip's Episcopal Church</u>				
2012149	Saint Philip's Episcopal Church 342 E. Wood Street Palatine, Illinois 60067	509(a)(1)	Requests \$30,000 over 18 months to install a LULA elevator.	\$14,567
<i>Total Saint Philip's Episcopal Church (1 item)</i>				
<u>Saint Stanislaus Bishop & Martyr</u>				
2012158	Saint Stanislaus Bishop & Martyr 14414 McKinley Avenue Posen, Illinois 60469	509(a)(1)	Requests \$30,000.00 over 18 months to renovate two restrooms, install a platform lift, and build a ramp.	\$30,000
<i>Total Saint Stanislaus Bishop & Martyr (1 item)</i>				
<u>Second Sense</u>				
2012034	Second Sense 65 E. Wacker Place Suite 1010 Chicago, Illinois 60601	509(a)(1)	One-year grant to provide training for seniors with vision loss that enables them to travel safely and independently in their communities and on public transit.	\$15,000
<i>Total Second Sense (1 item)</i>				

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Seniors Assistance Center				
2012076	Seniors Assistance Center 7774 W. Irving Park Road Norridge, Illinois 60706	509(a)(1)	Requests \$5,000 over six months to receive technical assistance around preliminary board development efforts.	\$5,000
2012222	Seniors Assistance Center 7774 W. Irving Park Road Norridge, Illinois 60706	509(a)(1)	Requests \$46,089 over one year to increase the organization's capacity for effective resource development.	\$5,000
<i>Total Seniors Assistance Center (2 items)</i>				\$10,000
<u>Services & Advocacy for Gay, Lesbian, Bisexual and Transgender Elders, Inc.</u>				
2011097	Services & Advocacy for Gay, Lesbian, Bisexual and Transgender Elders, Inc. 305 Seventh Avenue, 15th Floor New York, New York 10001	509(a)(2)	Requests \$40,000 over one year to train nonprofit mainstream aging services providers about the needs of LGBT elders.	\$40,000
<i>Total Services & Advocacy for Gay, Lesbian, Bisexual and Transgender Elders, Inc. (1 item)</i>				\$40,000
<u>Shrine of Christ the King Sovereign Priest</u>				
2012177	Shrine of Christ the King Sovereign Priest 6415 S. Woodlawn Avenue Chicago, Illinois 60637-3817	509(a)(1)	Requests \$30,000 over 18 months to construct an accessible restroom and to provide an accessible entrance.	\$30,000
<i>Total Shrine of Christ the King Sovereign Priest (1 item)</i>				\$30,000
<u>Sisters of the Holy Family of Nazareth</u>				
2012014	Sisters of the Holy Family of Nazareth 310 North River Road Des Plaines, Illinois 60016	509(a)(1)	One-year grant to purchase a handicapped accessible van.	\$55,000
<i>Total Sisters of the Holy Family of Nazareth (1 item)</i>				\$55,000
<u>Skokie Valley Agudath Jacob Synagogue</u>				
2010160	Skokie Valley Agudath Jacob Synagogue 8825 N. East Prairie Road Skokie, Illinois 60076	509(a)(1)	Eighteen-month grant to renovate two restrooms for accessibility.	-\$4,942

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
2010160	Skokie Valley Agudath Jacob Synagogue 8825 N. East Prairie Road Skokie, Illinois 60076	509(a)(1)	Eighteen-month grant to renovate two restrooms for accessibility.	-\$2,176
<i>Total Skokie Valley Agudath Jacob Synagogue (2 items)</i>				-\$7,117
<u>Southeast Lake County Faith in Action Volunteers</u>				
2012099	Southeast Lake County Faith in Action Volunteers 2789 Oak Street Highland Park, Illinois 60035	509(a)(1)	Requests \$10,500 over one year to train volunteers to help high-risk seniors access independent living resources.	-\$10,500
2012099	Southeast Lake County Faith in Action Volunteers 2789 Oak Street Highland Park, Illinois 60035	509(a)(1)	Requests \$10,500 over one year to train volunteers to help high-risk seniors access independent living resources.	\$10,500
2012099	Southeast Lake County Faith in Action Volunteers 2789 Oak Street Highland Park, Illinois 60035	509(a)(1)	Requests \$10,500 over one year to train volunteers to help high-risk seniors access independent living resources.	\$10,500
<i>Total Southeast Lake County Faith in Action Volunteers (3 items)</i>				\$10,500
<u>Swedish Covenant Hospital</u>				
2012031	Swedish Covenant Hospital 5145 North California Avenue Chicago, Illinois 60625	509(a)(1)	One-year grant to expand a program providing post-hospitalization, chronic disease telemedicine support. [approved for full amount; no challenge]	\$20,000
<i>Total Swedish Covenant Hospital (1 item)</i>				\$20,000
<u>Terra Nova Films, Inc.</u>				
2011024	Terra Nova Films, Inc. 9848 South Winchester Avenue Chicago, Illinois 60643	509(a)(1)	One-year grant to expand and enhance videos on English and Spanish websites for family caregivers of older adults.	\$28,200
<i>Total Terra Nova Films, Inc. (1 item)</i>				\$28,200

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
<u>The Foundation Center</u>				
2012052	The Foundation Center 79 Fifth Avenue New York, New York 10003	509(a)(1)	Requests \$12,000 over one year for 2012 program support.	\$12,000
<i>Total The Foundation Center (1 item)</i>				\$12,000
<u>The University of Georgia Office of Sponsored Programs.</u>				
2012138	The University of Georgia Office of Sponsored Programs. 617 Boyd Graduate Studies Research Center Athens, Georgia 30602-7411	509(a)(1)	Requests \$19,948 over one year to complete a book on innovative models older adults are developing to create intentional communities as a path toward resilient aging.	\$19,948
<i>Total The University of Georgia Office of Sponsored Programs. (1 item)</i>				\$19,948
<u>Treasure Coast Hospice</u>				
2011053	Treasure Coast Hospice 1201 S.E. Indian Street Stuart, Florida 34997	509(a)(3)	One-year continuation grant to expand a palliative care program in area nursing homes.	\$106,000
<i>Total Treasure Coast Hospice (1 item)</i>				\$106,000
<u>United Community Center, Inc.</u>				
2010166	United Community Center, Inc. 1028 South 9th Street Milwaukee, Wisconsin 53204	509(a)(1)	Two-year grant to coordinate health and social services at a new medical center serving low-income elderly Latinos.	\$25,000
<i>Total United Community Center, Inc. (1 item)</i>				\$25,000
<u>United HomeCare Services, Inc.</u>				
2012113	United HomeCare Services, Inc. 8400 NW 33rd Street, Suite 400 Miami, Florida 33122	509(a)(1)	Requests \$30,150 over one year for training and certification to improve the quality of chronic care interventions.	\$30,150
<i>Total United HomeCare Services, Inc (1 item)</i>				\$30,150

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
University of California, Los Angeles				
2009059	University of California, Los Angeles Los Angeles, California 90095-1406	509(a)(1)	One-year grant to study the quality of care for vulnerable community-dwelling elderly who transition directly from receiving care in the hospital emergency department to their homes.	-\$372
<i>Total University of California, Los Angeles (1 item)</i>				
University of Illinois at Chicago				
2008176	University of Illinois at Chicago Office of the Chancellor 2833 UH MC 102 601 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.	-\$1,466
2011238	University of Illinois at Chicago Office of the Chancellor 2833 UH MC 102 601 South Morgan Chicago, Illinois 60607-7128	509(a)(1)	Two-year grant for research to test replication strategies for Fit and Strong, an evidence-based exercise program for older adults with osteoarthritis.	\$66,000
2011238	University of Illinois at Chicago Office of the Chancellor 2833 UH MC 102 601 South Morgan Chicago, Illinois 60607-7128	509(a)(1)	Two-year grant for research to test replication strategies for Fit and Strong, an evidence-based exercise program for older adults with osteoarthritis.	\$33,000
2012005	University of Illinois at Chicago Office of the Chancellor 2833 UH MC 102 601 South Morgan Chicago, Illinois 60607-7128	509(a)(1)	One-year grant to support POLST outreach in Illinois.	\$2,500
2012277	University of Illinois at Chicago 1740 W. Taylor Street Suite 1400, UH m/c 693 Chicago, Illinois 60612	509(a)(1)	Requests \$25,000 over one year to implement, evaluate and refine POLST - Illinois in two pilot communities.	\$25,000
<i>Total University of Illinois at Chicago (5 items)</i>				
				\$125,034

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
<u>University of Maryland, Baltimore</u>				
2011107	University of Maryland, Baltimore 620 West Lexington Street Baltimore, Maryland 21201	509(a)(1)	Eighteen-month grant for the first national, longitudinal study of health and cost consequences of inappropriate use of psychopharmacological medications for nursing home residents.	\$108,775
<i>Total University of Maryland, Baltimore (1 item)</i>				
<u>University of Massachusetts Boston</u>				
2012046	University of Massachusetts Boston 100 Morrissey Blvd. Boston, Massachusetts 02125-3393		Requests \$103,754 over one year to replicate its pension counseling project to help retirees in Illinois, which is not served by a pension counseling program.	\$51,877
<i>Total University of Massachusetts Boston (1 item)</i>				
<u>University of South Florida</u>				
2011040	University of South Florida Division of Sponsored Research 3650 Spectrum Boulevard, Suite 160 Tampa, Florida 33612	509(a)(1)	Eighteen-month grant to test feasibility of a model, faith-based collaborative addressing depression in low-income African -American elders.	\$37,650
2011040	University of South Florida Division of Sponsored Research 3650 Spectrum Boulevard, Suite 160 Tampa, Florida 33612	509(a)(1)	Eighteen-month grant to test feasibility of a model, faith-based collaborative addressing depression in low-income African -American elders.	\$50,000
<i>Total University of South Florida (2 items)</i>				
<u>Washington University in St. Louis</u>				
2008271	Washington University in St. Louis Campus Box 1054 One Brookings Drive St. Louis, Missouri 63130	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.	-\$620
<i>Total Washington University in St. Louis (1 item)</i>				

Request ID	Organization Name Address	Tax Determination	Project Description	Amount
Wayne State University, Office of Research and Sponsored Programs				
2010017	Wayne State University, Office of Research and Sponsored Programs 5057 Woodward Avenue, Suite 13001 Detroit, Michigan 48202	509(a)(1)	Two-year grant for a randomized controlled trial of a project to bring continuing education on mental health and aging to occupational therapists.	\$31,000
<i>Total Wayne State University, Office of Research and Sponsored Programs (1 item)</i>				\$31,000
Wellington Avenue UCC				
2012154	Wellington Avenue UCC 615 W. Wellington Avenue Chicago, Illinois 60657	509(a)(1)	Requests \$30,000 over 18 months to install three platform lifts, relocate church office, and redesign an entry for accessibility.	\$30,000
<i>Total Wellington Avenue UCC (1 item)</i>				\$30,000
Western Illinois Area Agency on Aging				
2011206	Western Illinois Area Agency on Aging 729 34th Avenue Rock Island, Illinois 61201	509(a)(1)	One-year grant to expand the Matter of Balance falls prevention program across 13 mostly rural, west-central Illinois counties.	\$35,900
<i>Total Western Illinois Area Agency on Aging (1 item)</i>				\$35,900
Woodstock Institute				
2012235	Woodstock Institute 29 East Madison Street, Suite 1710 Chicago, Illinois 60602-4566	509(a)(1)	Requests \$12,500 over one year to build support for a systemic policy solution to improve retirement security for private sector workers in Illinois who lack access to employment retirement plans.	\$12,500
<i>Total Woodstock Institute (1 item)</i>				\$12,500
Grand Totals (157 items)				\$5,013,615

ADD BACK RETURNED GRANTS

INCLUDED ABOVE

46,260

TOTAL (Form 990PF, PART XV, Line 3a)

5,059,875

**RETIREMENT RESEARCH FOUNDATION
CHICAGO, ILLINOIS
FORM 990 PF
DECEMBER 31, 2012
36-2429540**

**MATCHING GIFTS
ATTACHMENT B
Part XV Page 11
Details to Line 3a
Pages 1 through 2**

**THE RETIREMENT RESEARCH FOUNDATION
CHICAGO, IL.**

ATTACHMENT B

**36-2429540 FORM 990PF PART XV LINE 3b MATCHING GIFTS PROGRAM
FOR THE YEAR ENDED 12-31-2012**

Name	Address	Amount	Tax Status
Dystonia Medical Research Foundation	One East Wacker Dr , Ste 2810 Chicago, IL 60601	750 00	509(a)(1)
St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	3,000 00	509(a)(1)
St Michael School - Streater	410 S Park St Streater, IL 61364	150 00	509(a)(1)
Our Saviour's Lutheran Church	1234 N Arlington Hts Rd Arlington Hts , IL 60004	7,500 00	509(a)(1)
Indiana University Foundation	P O Box 500 Bloomington, IN 47402	3,600 00	509(a)(1)
St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	3,000 00	509(a)(1)
CommunityFoundation of the FoxRiverValley	111 W Downer Pl #312 Aurora, IL 60506	510 00	509(a)(1)
The Humane Society of the United States	2100 L Street NW Washington, DC 20037	1,200 00	509(a)(1)
Archdiocese of Chicago-	Annual Catholic Appeal 835 North Rush St Chicago, IL 60611	4,500 00	509(a)(1)
St Scholastica Academy	7416 N Ridge Blvd Chicago, IL 60645	750 00	509(a)(1)
University of Wisc Milwaukee Foundation	1440 E North Ave Milwaukee, WI 53202	15,000 00	509(a)(1)
St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	3,000 00	509(a)(1)
Generations Incorporated	25 Kingston St , 4th Floor Boston, MA 02111	1,500 00	509(a)(1)
Our Saviour's Lutheran Church	1234 N Arlington Hts Rd Arlington Hts , IL 60004	11,250 00	509(a)(1)
St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	3,000 00	509(a)(1)
Amercan Occupational Therapy Found	4720 Montgomery Lane P O Box 31220 Bethesda, MD 20814-1220	300 00	509(a)(1)
Little Brothers-Friends of the Elderly	355 N Ashland Avenue Chicago, IL 60607	1,500 00	509(a)(1)
Housing Opportunities & Maintenance	for the Elderly 1419 W Carroll Avenue, FL 2 Chicago, IL 60607-1149	1,500 00	509(a)(1)
Global Action on Aging, Inc	P O Box 20022 New York, NY 10025	300 00	509(a)(1)
United Community Center, Inc	1028 S 9th St Milwaukee, WI 53204	750 00	509(a)(1)
Mount Mary University	2900 N Menomonee River Pkw Milwaukee, WI 53222	1,500 00	509(a)(1)
City at Peace - National	The Possibility Project 104 W 27th Street, 12th Floor New York, NY 10001	4,500 00	509(a)(1)
NHS Band Parents, Inc	P O Box 187 402 Graham Ave Eau Claire, WI 54703	300 00	509(a)(1)
AIDS Foundation of Chicago	200 W Jackson Blvd , Ste 2200 Chicago, IL 60606	375 00	509(a)(1)
Housing Opportunities & Maintenance	for the Elderly 1419 W Carroll Avenue, FL 2 Chicago, IL 60607-1149	150 00	509(a)(1)
Saint Xavier University	3700 W 103rd Street Chicago, IL 60655	3,000 00	509(a)(1)
Housing Opportunities & Maintenance	for the Elderly 1419 W Carroll Avenue, FL 2 Chicago, IL 60607-1149	750 00	509(a)(1)
St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	3,000 00	509(a)(1)
Little Sisters of the Poor	St Joseph's Home for the Elderly 80 W Northwest Hwy Palatine, IL 60067	375 00	509(a)(1)
Sisters of the Holy Family of Nazareth	310 N River Road Des Plaines, IL 60016	375 00	509(a)(1)
St Gabriel Catholic Church	731 N Ocean Blvd Pompano Beach, FL 33062	900 00	509(a)(1)
Lincoln Park Village, Inc	2502 N Clark Street Chicago, IL 60614	6,000 00	509(a)(1)
Chinese American Service League, Inc	2141 S Tan Court Chicago, IL 60616	300 00	509(a)(1)
Access Living of Metropolitan Chicago	115 W Chicago Avenue Chicago, IL 60654	1,800 00	509(a)(1)
Northwest Side Housing Center	5007 N Addison Street Chicago, IL 60641	225 00	509(a)(1)
St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	3,000 00	509(a)(1)
St Scholastica Academy	7416 N Ridge Blvd Chicago, IL 60645	750 00	509(a)(1)
Our Saviour's Lutheran Church	1234 N Arlington Hts Rd Arlington Hts , IL 60004	1,500 00	509(a)(1)
Immaculate Conception Parsh	1431 N North Park Ave Chicago, IL 60610	1,500 00	509(a)(1)
Catholic Chanties-Archdiocese of Chicago	721 N LaSalle St -4th Floor Chicago, IL 60654-3503	3,000 00	509(a)(1)
Central DuPage Health Foundation	05050 Winfield Rd , Ste 200 Winfield, IL 60190	225 00	509(a)(1)
Lincoln Park Village, Inc	2502 N Clark Street Chicago, IL 60614	375 00	509(a)(1)
Rev John P Smyth Standing Tall Fdn	Chantable Foundation 1100 N River Road Des Plaines, IL 60016	300 00	509(a)(1)
Chicago Public Library Foundation	20 N Michigan Ave -Suite 520 Chicago, IL 60602	1,500 00	509(a)(1)
Susan G Komen Breast Cancer Foundation	Susan G Komen 3-Day 205 N Michigan Ave , Ste 2630 Chicago, IL 60601	750 00	509(a)(1)
Childrens Dyslexia Centers Inc	Children's Dyslexia Center-Madison 301 Wisconsin Ave Madison, WI 53703	300 00	509(a)(1)
Wildflowers Institute	1144 Pacific Avenue San Francisco, CA 94133-4212	1,500 00	509(a)(1)
St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	3,000 00	509(a)(1)
Lake Forest Lake Bluff Sr Citizens Fdn	100 E Old Mill Road Lake Forest, IL 60045	750 00	509(a)(1)
Aging Care Connections	111 W Harns Ave LaGrange, IL 60525	225 00	509(a)(1)
Generations Incorporated	25 Kingston St , 4th Floor Boston, MA 02111	750 00	509(a)(1)
St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	3,000 00	509(a)(1)
Chicago Horticultural Society	Chicago Botanic Garden 1000 Lake Cook Road Glencoe, Illinois 60022	330 00	509(a)(1)
St John's Episcopal Church	574 South Sheldon Road Plymouth, Michigan 48170	300 00	509(a)(1)

**THE RETIREMENT RESEARCH FOUNDATION
CHICAGO, IL.
36-2429540 FORM 990PF PART XV LINE 3b MATCHING GIFTS PROGRAM
FOR THE YEAR ENDED 12-31-2012**

ATTACHMENT B

Name	Address	Amount	Tax Status
Grantmakers in Aging, Inc	2001 Jefferson Davis Hwy, #504 Arlington, VA 22202	750 00	509(a)(1)
Addolorata Villa Foundation Inc	555 McHenry Road Wheeling, Illinois 60004	150 00	509(a)(1)
Susan G Komen Breast Cancer Fnd Peona	Memorial Affiliate Peona 4700 S University, #92 Peona, IL 61614	150 00	509(a)(1)
Loyola University of Chicago	820 North Michigan Chicago, IL 60611	150 00	509(a)(1)
University of Illinois Foundation	1305 West Green Street Urbana, IL 61801-2962	450 00	509(a)(1)
St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	3,000 00	509(a)(1)
Umoja Student Development Corporation	2935 West Polk, Room 116 Chicago, Illinois 60612	1,500 00	509(a)(1)
Rev John P Smyth Standing Tall Fnd	1100 North River Road Des Plaines, IL 60016	300 00	509(a)(1)
St John Berchmans	2517 W Logan Blvd Chicago, IL 60647	150 00	509(a)(1)
Quinn Chapel A M E Church	2401 S Wabash Ave Chicago, IL 60616	150 00	509(a)(1)
Open Books LTD	213 W Institute Place Chicago, IL 60610	600 00	509(a)(1)
Immaculate Conception Pansh	1431 N North Park Ave Chicago, IL 60610	450 00	509(a)(1)
Loyola University of Chicago	820 North Michigan Chicago, IL 60611	900 00	509(a)(1)
Housing Opportunities & Maintenance	for the Elderly 1419 W Carroll Avenue, FL 2 Chicago, IL 60607-1149	750 00	509(a)(1)
Operation Support Our Troops - Amenca	1807 S Washington, #110-359 Naperville, IL 60565	300 00	509(a)(1)
St Michael in Old Town	1633 N Cleveland Ave Chicago, IL 60614	600 00	509(a)(1)
Fr McGivney Ctr of Hope & Healing	P O Box 82 Glenview, IL 60025	660 00	509(a)(1)
St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	3,000 00	509(a)(1)
Free Spirit Media	1327 W Washington #103-B Chicago, IL 60607	150 00	509(a)(1)
Services for Adults Staying in Their Homes	(SASI) 1123 Emerson, #200 Evanston, IL 60201	2,700 00	509(a)(1)
Aging Care Connections	111 W Hams Ave LaGrange, IL 60525	750 00	509(a)(1)
Wildflowers Institute	1144 Pacific Avenue San Francisco, CA 94133-4212	750 00	509(a)(1)
Hinsdale Humane Society	22 N Elm Street Hinsdale, IL 60521	1,650 00	509(a)(1)
The University of Chicago	5801 S Ellis Avenue Suite #7 Chicago, IL 60637	300 00	509(a)(1)
American Occupational Therapy Found	4720 Montgomery Lane P O Box 31220 Bethesda, MD 20814-1220	2,100 00	509(a)(1)
Chicago Foundation for Women	1 E Wacker Dr, Suite 1620 Chicago, IL 60601	300 00	509(a)(1)
Lincoln Park Village, Inc	2502 N Clark Street Chicago, IL 60614	6,000 00	509(a)(1)
LeadingAGE Cnsis Fund	2519 Connecticut Ave NW Washington, D C 20008	300 00	509(a)(1)
University Club Foundation	76 E Monroe Street Chicago, IL 60603	300 00	509(a)(1)
American Red Cross	2200 W Hamson Chicago, Illinois 60612	300 00	509(a)(1)
Housing Opportunities & Maintenance	for the Elderly 1419 W Carroll Avenue, FL 2 Chicago, IL 60607-1149	1,500 00	509(a)(1)
St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	150 00	509(a)(1)
Northern Illinois Food Bank	273 Dearborn Ct Geneva, IL 60134	375 00	509(a)(1)
St Scholastica Academy	7416 N Ridge Blvd Chicago, IL 60645	750 00	509(a)(1)
Mount Mercy Academy	88 Red Jacket Parkway Buffalo, New York 14220	450 00	509(a)(1)
Center for Medicare Advocacy, Inc	1025 Connecticut Ave, NW, Ste 709 Washington, DC 20036	150 00	509(a)(1)
Pioneer Network in Culture Change	35 E Wacker Dr, Ste 850 Chicago, IL 60601	750 00	509(a)(1)
Bonnet House, Inc	900 N Birch Rd Ft Lauderdale, FL 33304	150 00	509(a)(1)
National Religious Retirement Office	3211 4th Street NE Washington, DC 20017-1194	1,050 00	509(a)(1)
Lake Forest Lake Bluff Sr Citizens Fdn	100 E Old Mill Road Lake Forest, IL 60045	750 00	509(a)(1)
Little Brothers-Friends of the Elderly	355 N Ashland Avenue Chicago, IL 60607	150 00	509(a)(1)
Aging Care Connections	111 W Hams Ave LaGrange, IL 60525	600 00	509(a)(1)
Crossroads Fund	3411 W Diversey, Ste 20 Chicago, IL 60647	150 00	509(a)(1)
God's Awesome Army Ministries	P O Box 682528 Houston, TX 77268-2528	3,750 00	509(a)(1)
University of Wisc Milwaukee Foundation	1440 E North Ave Milwaukee, WI 53202	4,500 00	509(a)(1)
Rehabilitation Institute of Chicago	345 E Superior Street Chicago, IL 60611	150 00	509(a)(1)
San Francisco Hospital Foundation	2789 25th St #2028 San Francisco, CA 94110	2,100 00	509(a)(1)
Salvation Army	1445 W Broward Blvd Fort Lauderdale, FL 33312	300 00	509(a)(1)
Rehabilitation Institute of Chicago	345 E Superior Street Chicago, IL 60611	300 00	509(a)(1)
TOTAL MATCHING GIFTS		157,350.00	

**RETIREMENT RESEARCH FOUNDATION
CHICAGO, ILLINOIS
FORM 990 PF
DECEMBER 31, 2012
36-2429540**

**GRANTS APPROVED FOR FUTURE PAYMENT
ATTACHMENT C
Part XV Page 11
Details to Line 3b
Pages 1 through 15**

Future Payments - Attachment "C" FY2012

6 November 2013

Request ID	Organization Name Address	Tax Determination	Project Description	Schedule Date	Amount
<u>AgeOptions, Inc.</u>					
2012271	AgeOptions, Inc. 1048 West Lake Street, Suite 300 Oak Park, Illinois 60301-1102	509(a)(1)	Requests \$115,000 over one year to continue the Make Medicare Work Coalition that builds the capacity of service providers to assist elderly understand and navigate health care benefits and advocate on their behalf.	4/15/2013	\$32,500
2012271	AgeOptions, Inc. 1048 West Lake Street, Suite 300 Oak Park, Illinois 60301-1102	509(a)(1)	Requests \$115,000 over one year to continue the Make Medicare Work Coalition that builds the capacity of service providers to assist elderly understand and navigate health care benefits and advocate on their behalf.	1/15/2013	\$50,000
2012271	AgeOptions, Inc. 1048 West Lake Street, Suite 300 Oak Park, Illinois 60301-1102	509(a)(1)	Requests \$115,000 over one year to continue the Make Medicare Work Coalition that builds the capacity of service providers to assist elderly understand and navigate health care benefits and advocate on their behalf.	10/15/2013	\$32,500
Total AgeOptions, Inc. (3 items)					<u>\$115,000</u>
<u>Alivio Medical Center, Inc.</u>					
2012043	Alivio Medical Center, Inc. 966 West 21st Street Chicago, Illinois 60608	509(a)(1)	One-year grant to develop and implement a program which trains volunteers to help seniors access available benefits and community resources in four communities.	4/15/2013	\$35,000
Total Alivio Medical Center, Inc. (1 item)					<u>\$35,000</u>
<u>American Academy of Home Care Physicians</u>					
2012001	American Academy of Home Care Physicians P. O. Box 1037 Edgewood, Maryland 21040-0337	509(a)(1)	One-year grant for a learning collaborative to assist home care medicine practices with identifying, sharing and implementing best practices for the Independence at Home demonstration project.	1/15/2013	\$79,420
Total American Academy of Home Care Physicians (1 item)					<u>\$79,420</u>

Request ID	Organization Name Address	Tax Determination	Project Description	Schedule Date	Amount
<u>American Geriatrics Society</u>					
2012007	American Geriatrics Society 40 Fulton Street, 18th Floor New York, New York 10038	509(a)(2)	Two-year grant to disseminate up-to-date information to the public and supportive care providers about medications that are dangerous for older adults.	1/15/2013	\$54,546
<i>Total American Geriatrics Society (1 item)</i>					
<u>American Public Health Association</u>					
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.	11/15/2013	\$6,000
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.	11/15/2014	\$6,000
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.	11/15/2015	\$6,000
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.	11/15/2016	\$6,000
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.	11/15/2017	\$6,000
<i>Total American Public Health Association (5 items)</i>					
<u>Asian Health Coalition</u>					
2012228	Asian Health Coalition 180 W. Washington St., Suite 1000 Chicago, Illinois 60602	509(a)(1)	Requests \$30,000 over one year to continue a program aimed at reducing disparities in colorectal cancer among Asian Americans.	1/15/2013	\$30,000

Request ID	Organization Name Address	Tax Determination	Project Description	Schedule Date	Amount
Total Asian Health Coalition (1 item)					
<u>Baylor College of Medicine</u>					
2011276	Baylor College of Medicine One Baylor Plaza Houston, Texas 77030	509(a)(1)	Requests \$111,182 over two years to implement and pilot-test an intervention to address late life anxiety.	10/15/2013	\$59,048
Total Baylor College of Medicine (1 item)					
<u>Brown University</u>					
2011266	Brown University 164 Angell Street, Box 1929 Providence, Rhode Island 02912	509(a)(1)	Three year grant to evaluate toward objectives of RRF Initiative to supporting national expansion of the 'Physicians Orders for Life-Sustaining Treatment' paradigm.	1/15/2013	\$20,000
2011266	Brown University 164 Angell Street, Box 1929 Providence, Rhode Island 02912	509(a)(1)	Three year grant to evaluate toward objectives of RRF Initiative to supporting national expansion of the 'Physicians Orders for Life-Sustaining Treatment' paradigm.	1/15/2014	\$20,000
Total Brown University (2 items)					
<u>Catholic Charities of the Archdiocese of Chicago</u>					
2012275	Catholic Charities of the Archdiocese of Chicago 721 North LaSalle Street Chicago, Illinois 60654-3503	509(a)(2)	Requests \$40,075 over one year to continue training home care aides and the seniors whom they serve about proper nutrition and healthy meal preparation.	5/15/2013	\$20,037
2012275	Catholic Charities of the Archdiocese of Chicago 721 North LaSalle Street Chicago, Illinois 60654-3503	509(a)(2)	Requests \$40,075 over one year to continue training home care aides and the seniors whom they serve about proper nutrition and healthy meal preparation.	1/15/2013	\$20,038
Total Catholic Charities of the Archdiocese of Chicago (2 items)					

Request ID	Organization Name Address	Tax Determination	Project Description	Schedule Date	Amount
Center of Concern					
2012128	Center of Concern 1580 N. Northwest Highway, Suite 310 Park Ridge, Illinois 60068-1469	509(a)(1)	Requests a \$48,180 organizational capacity building grant over nine months to develop and begin implementation of a strategic fundraising plan.	4/15/2013	\$23,180
Total Center of Concern (1 item)					\$23,180
Chinese American Service League, Inc.					
2012234	Chinese American Service League, Inc. 2141 South Tan Court Chicago, Illinois 60616	509(a)(1)	Requests \$65,000 over one year to translate the coach handbook for the falls prevention program "Matter of Balance" into Chinese and then implement the program to serve Chinese older adults.	7/15/2013	\$32,000
2012234	Chinese American Service League, Inc. 2141 South Tan Court Chicago, Illinois 60616	509(a)(1)	Requests \$65,000 over one year to translate the coach handbook for the falls prevention program "Matter of Balance" into Chinese and then implement the program to serve Chinese older adults.	1/15/2013	\$33,000
Total Chinese American Service League, Inc. (2 items)					\$65,000
Community Harvest Food Bank of Northeast Indiana, Inc.					
2012218	Community Harvest Food Bank of Northeast Indiana, Inc. 999 East Tillman Road P.O. Box 10967 Fort Wayne, Indiana 46855-0967	509(a)(1)	Requests \$25,000 over one year for delivery of groceries to homebound seniors in northeastern Indiana.	1/15/2013	\$25,000
Total Community Harvest Food Bank of Northeast Indiana, Inc. (1 item)					\$25,000
Council for Jewish Elderly					
2011214	Council for Jewish Elderly 3003 West Touhy Avenue Chicago, Illinois 60645	509(a)(1)	One-year grant to provide social work/care management services to 1) enhance high-risk elders' transition from hospital settings to home or sub-acute care and 2) avoid re-hospitalization.	1/15/2013	\$15,000
Total Council for Jewish Elderly (1 item)					\$15,000

Request ID	Organization Name Address	Tax Determination	Project Description	Schedule Date	Amount
<u>Council on Aging of Martin County, Inc.</u>					
2012247	Council on Aging of Martin County, Inc. 900 SE Salerno Road Stuart, Florida 34997	509(a)(1)	Requests \$124,828 in second year funding to increase access to geriatric care by co-locating a clinic within a senior center.	4/15/2013	\$75,000
2012247	Council on Aging of Martin County, Inc. 900 SE Salerno Road Stuart, Florida 34997	509(a)(1)	Requests \$124,828 in second year funding to increase access to geriatric care by co-locating a clinic within a senior center.	10/15/2013	\$49,828
<u>Total Council on Aging of Martin County, Inc. (2 items)</u>					\$124,828
<u>Easter Seals, National Office</u>					
2011252	Easter Seals, National Office 233 S. Wacker Drive, Suite 2400 Chicago, Illinois 60606	509(a)(2)	Two-year grant for a training program to transform the culture of adult day services to deliver person-centered care.	4/15/2013	\$37,200
2011252	Easter Seals, National Office 233 S. Wacker Drive, Suite 2400 Chicago, Illinois 60606	509(a)(2)	Two-year grant for a training program to transform the culture of adult day services to deliver person-centered care.	7/15/2013	\$37,200
<u>Total Easter Seals, National Office (2 items)</u>					\$74,400
<u>Education Training and Research Associates</u>					
2012199	Education Training and Research Associates 4 Carbonero Way Scotts Valley, California 95066-4200	509(a)(1)	Requests \$317,553 over two years to refine and test a cognitive behavioral therapy intervention addressing insomnia to help older adults with mild cognitive impairment who live in residential care facilities.	1/15/2013	\$84,000
2012199	Education Training and Research Associates 4 Carbonero Way Scotts Valley, California 95066-4200	509(a)(1)	Requests \$317,553 over two years to refine and test a cognitive behavioral therapy intervention addressing insomnia to help older adults with mild cognitive impairment who live in residential care facilities.	7/15/2013	\$83,814

Request ID	Organization Name Address	Tax Determination	Project Description	Schedule Date	Amount
2012199	Education Training and Research Associates 4 Carbonero Way Scotts Valley, California 95066-4200	509(a)(1)	Requests \$317,553 over two years to refine and test a cognitive behavioral therapy intervention addressing insomnia to help older adults with mild cognitive impairment who live in residential care facilities.	7/15/2014	\$69,739
2012199	Education Training and Research Associates 4 Carbonero Way Scotts Valley, California 95066-4200	509(a)(1)	Requests \$317,553 over two years to refine and test a cognitive behavioral therapy intervention addressing insomnia to help older adults with mild cognitive impairment who live in residential care facilities.	1/15/2014	\$80,000
<i>Total Education Training and Research Associates (4 items)</i>					<u>\$317,553</u>
<u>Elderday Center, Inc.</u>					
2012198	Elderday Center, Inc. 328 W. Wilson Street Batavia, Illinois 60510	509(a)(1)	One-year grant to develop and implement a comprehensive Human Resources Plan.	1/15/2013	\$7,518
<i>Total Elderday Center, Inc. (1 item)</i>					<u>\$7,518</u>
<u>Eskenazi Health Foundation Inc</u>					
2012214	Eskenazi Health Foundation Inc 1001 W. Tenth Street Indianapolis, Indiana 46202	509(a)(3)	Requests \$99,465 for a third year to continue and expand its volunteer guardianship program protecting the health, well-being, and safety of isolated decisionally-incapable ill older adults.	7/15/2013	\$49,465
2012214	Eskenazi Health Foundation Inc 1001 W. Tenth Street Indianapolis, Indiana 46202	509(a)(3)	Requests \$99,465 for a third year to continue and expand its volunteer guardianship program protecting the health, well-being, and safety of isolated decisionally-incapable ill older adults.	1/15/2013	\$50,000
<i>Total Eskenazi Health Foundation Inc (2 items)</i>					<u>\$99,465</u>
<u>Family Service Agency of DeKalb County</u>					
2012224	Family Service Agency of DeKalb County 14 Health Services Drive DeKalb, Illinois 60115	509(a)(1)	Requests \$24,000 over 13 months to replicate Enhance Fitness in five senior centers to improve the overall functional fitness of older adults.	1/15/2013	\$24,000
<i>Total Family Service Agency of DeKalb County (1 item)</i>					<u>\$24,000</u>

Request ID	Organization Name Address	Tax Determination	Project Description	Schedule Date	Amount
<u>Ford Heights Community Service Organization Inc</u>					
2012203	Ford Heights Community Service Organization Inc 943 East Lincoln Highway Ford Heights, Illinois 60411	509(a)(1)	One-year grant for Senior Wellness and Education Lifestyles, a program which integrates congregational dining with health education, exercise, and preventive screenings.	1/15/2013	\$26,166
2012203	Ford Heights Community Service Organization Inc 943 East Lincoln Highway Ford Heights, Illinois 60411	509(a)(1)	One-year grant for Senior Wellness and Education Lifestyles, a program which integrates congregational dining with health education, exercise, and preventive screenings.	4/15/2013	\$26,000
<i>Total Ford Heights Community Service Organization Inc (2 items)</i>					<u>\$52,166</u>
<u>Greater Chicago Food Depository</u>					
2012044	Greater Chicago Food Depository 4100 West Ann Lurie Place Chicago, Illinois 60632	509(a)(1)	One-year challenge grant to improve and expand a program for seniors that provides access to nutritious food, information and enrollment assistance related to SNAP, and opportunities to participate in healthy cooking demonstrations.	1/15/2013	\$50,000
<i>Total Greater Chicago Food Depository (1 item)</i>					<u>\$50,000</u>
<u>Hands On Suburban Chicago</u>					
2011277	Hands On Suburban Chicago 2121 South Goebbert Road Arlington Heights, Illinois 60005	509(a)(1)	Requests \$45,000 over one year to build the organization's capacity for effective marketing and outreach.	1/15/2013	\$10,000
<i>Total Hands On Suburban Chicago (1 item)</i>					<u>\$10,000</u>
<u>Hanul Family Alliance</u>					
2011273	Hanul Family Alliance 5008 North Kedzie Avenue Chicago, Illinois 60625	509(a)(1)	Requests \$47,775 over one year to build the organization's capacity for effective human resource practices and management.	1/15/2013	\$7,775
<i>Total Hanul Family Alliance (1 item)</i>					<u>\$7,775</u>

Request ID	Organization Name Address	Tax Determination	Project Description	Schedule Date	Amount
<u>Hospice Care Plus Inc.</u>					
2012248	Hospice Care Plus Inc. 208 Kidd Drive Berea, Kentucky 40403	509(a)(1)	Requests \$36,600 over six months toward partial costs for a new program to respond more effectively to patients' needs for durable medical equipment.	1/15/2013	\$36,600
<u>Total Hospice Care Plus Inc. (1 item)</u>					
					\$36,600
<u>Illinois Pioneer Coalition</u>					
2011272	Illinois Pioneer Coalition 639 York Street Quincy, Illinois 62301	509(a)(2)	Requests \$40,000 over 18 months to raise awareness of person-centered care by pilot testing a consumer culture change education program in four regions of Illinois.	4/15/2013	\$20,000
<u>Total Illinois Pioneer Coalition (1 item)</u>					
					\$20,000
<u>International Honor Society of Nursing Foundation</u>					
2011219	International Honor Society of Nursing Foundation 550 W. North Street Indianapolis, Indiana 46202	509(a)(1)	Two-year grant to train and support nurses for leadership and improved care delivery in geriatric settings.	1/15/2013	\$59,972
<u>Total International Honor Society of Nursing Foundation (1 item)</u>					
					\$59,972
<u>Jewish Family & Community Services of Southwest Florida</u>					
2012253	Jewish Family & Community Services of Southwest Florida 5025 Castello Drive Suite 101 Naples, Florida 34103	509(a)(1)	Requests \$25,000 over one year to establish a volunteer program to address social isolation of frail seniors in Southwest Florida.	1/15/2013	\$25,000
<u>Total Jewish Family & Community Services of Southwest Florida (1 item)</u>					
					\$25,000
<u>Jewish Vocational Service and Employment Center</u>					
2012006	Jewish Vocational Service and Employment Center 216 West Jackson Blvd., Suite 700 Chicago, Illinois 60606-6921	509(a)(1)	One-year grant to provide job readiness skill training for seniors and help them secure unsubsidized employment.	1/15/2013	\$8,200
<u>Total Jewish Vocational Service and Employment Center (1 item)</u>					
					\$8,200

Request ID	Organization Name Address	Tax Determination	Project Description	Schedule Date	Amount
<u>Korean American Community Services</u>					
2012237	Korean American Community Services 4300 North California Avenue Chicago, Illinois 60618-1514	509(a)(2)	One-year grant to continue a program that engages and trains recently retired Korean Americans to educate and assist eligible low-income Korean seniors with public benefits enrollment.	1/15/2013	\$33,000
<u>Total Korean American Community Services (1 item)</u>					\$33,000
<u>National Able Network</u>					
2012039	National Able Network 567 W. Lake Street, Suite 1150 Chicago, Illinois 60661-1405	509(a)(1)	One-year grant to provide employment training and counseling for low-income older adults.	1/15/2013	\$21,497
<u>Total National Able Network (1 item)</u>					\$21,497
<u>National Consumer Voice for Quality Long-Term Care</u>					
2012019	National Consumer Voice for Quality Long-Term Care 1001 Connecticut Avenue Suite 425 Washington, DC 20036	509(a)(1)	Eighteen-month grant to develop the first comprehensive online clearinghouse of information on long-term care targeted to advocates, consumers, and their families.	1/15/2013	\$16,666
2012019	National Consumer Voice for Quality Long-Term Care 1001 Connecticut Avenue Suite 425 Washington, DC 20036	509(a)(1)	Eighteen-month grant to develop the first comprehensive online clearinghouse of information on long-term care targeted to advocates, consumers, and their families.	7/15/2013	\$16,666
<u>Total National Consumer Voice for Quality Long-Term Care (2 items)</u>					\$33,332
<u>National Council on Aging, Inc.</u>					
2011132	National Council on Aging, Inc. 1901 L Street, N.W., 4th Floor Washington, DC 20036	509(a)(2)	Three-year special initiative to enhance the development of a new comprehensive model of assisting older adults to become more economically secure by creating, testing, and evaluating new technology tools for service providers and consumers.	3/15/2013	\$256,366

Request ID	Organization Name Address	Tax Determination	Project Description	Schedule Date	Amount
2011132	National Council on Aging, Inc. 1901 L Street, N.W., 4th Floor Washington, DC 20036	509(a)(2)	Three-year special initiative to enhance the development of a new comprehensive model of assisting older adults to become more economically secure by creating, testing, and evaluating new technology tools for service providers and consumers.	10/15/2013	\$194,953
2011132	National Council on Aging, Inc. 1901 L Street, N.W., 4th Floor Washington, DC 20036	509(a)(2)	Three-year special initiative to enhance the development of a new comprehensive model of assisting older adults to become more economically secure by creating, testing, and evaluating new technology tools for service providers and consumers.	7/15/2014	\$72,131
2011132	National Council on Aging, Inc. 1901 L Street, N.W., 4th Floor Washington, DC 20036	509(a)(2)	Three-year special initiative to enhance the development of a new comprehensive model of assisting older adults to become more economically secure by creating, testing, and evaluating new technology tools for service providers and consumers.	3/15/2014	\$133,543
Total National Council on Aging, Inc. (4 items)					<u>\$656,993</u>
<u>National People's Action</u>					
2012231	National People's Action 810 North Milwaukee Avenue Chicago, Illinois 60642	509(a)(2)	Requests \$45,000 in second-year support for an advocacy campaign to end predatory payday lending practices targeting seniors.	1/15/2013	\$45,000
Total National People's Action (1 item)					<u>\$45,000</u>
<u>Nova Southeastern University</u>					
2012038	Nova Southeastern University 3301 College Avenue Fort Lauderdale, Florida 33314	509(a)(1)	Eighteen month grant for research on a non-pharmacologic intervention which would be managed by family caregivers to improve sleep in persons with dementia.	1/15/2013	\$45,421
2012038	Nova Southeastern University 3301 College Avenue Fort Lauderdale, Florida 33314	509(a)(1)	Eighteen month grant for research on a non-pharmacologic intervention which would be managed by family caregivers to improve sleep in persons with dementia.	7/15/2013	\$48,969

Request ID	Organization Name Address	Tax Determination	Project Description	Schedule Date	Amount
<i>Total Nova Southeastern University (2 items)</i>					
<u>Oregon Health & Science University Foundation</u>					
2011070	Oregon Health & Science University Foundation 1121 SW Salmon Street, Suite 100 Portland, Oregon 97205	509(a)(1)	Three-year special initiative to advance end-of-life care by catalyzing the spread of POLST (Physician Orders for Life Sustaining Treatment) across the United States through small grants, technical assistance and national program office support.	1/15/2013	\$185,835
2011070	Oregon Health & Science University Foundation 1121 SW Salmon Street, Suite 100 Portland, Oregon 97205	509(a)(1)	Three-year special initiative to advance end-of-life care by catalyzing the spread of POLST (Physician Orders for Life Sustaining Treatment) across the United States through small grants, technical assistance and national program office support.	10/15/2013	\$116,095
<i>Total Oregon Health & Science University Foundation (2 items)</i>					\$301,930
<u>Personal Assistance Telephone Help, Inc.</u>					
2011257	Personal Assistance Telephone Help, Inc. 201 E. Grove Street, Suite 200 Bloomington, Illinois 61701	509(a)(1)	Two-year grant to create self-neglect response system for older adults in McLean County, Illinois.	1/14/2013	\$20,852
<i>Total Personal Assistance Telephone Help, Inc. (1 item)</i>					\$20,852
<u>Pillars Community Services</u>					
2012205	Pillars Community Services 333 North LaGrange Road Suite One LaGrange Park, Illinois 60526	509(a)(2)	Requests \$50,000 over one year to continue a program providing mental health treatment to older adults including PEARLS therapy and case management.	1/15/2013	\$50,000
<i>Total Pillars Community Services (1 item)</i>					\$50,000
<u>Rainbow Hospice and Palliative Care</u>					
2011023	Rainbow Hospice and Palliative Care 1550 Bishop Court Mount Prospect, Illinois 60056	509(a)(1)	Three-year grant to build capacity of four nursing homes for persons with advanced dementia, and develop a self-sustaining, specialized dementia care program.	12/14/2013	\$60,740

Request ID	Organization Name Address	Tax Determination	Project Description	Schedule Date	Amount
2011023	Rainbow Hospice and Palliative Care 1550 Bishop Court Mount Prospect, Illinois 60056	509(a)(1)	Three-year grant to build capacity of four nursing homes for persons with advanced dementia, and develop a self-sustaining, specialized dementia care program.	5/15/2013	\$60,740
<i>Total Rainbow Hospice and Palliative Care (2 items)</i>					\$121,480
<u>Rehabilitation Institute of Chicago</u>					
2011027	Rehabilitation Institute of Chicago 345 East Superior Street Chicago, Illinois 60611	509(a)(1)	Three-year grant for on-line database to assist rehabilitation clinicians working with older adult patients.	10/15/2013	\$47,865
<i>Total Rehabilitation Institute of Chicago (1 item)</i>					\$47,865
<u>Senior Services Associates, Inc.</u>					
2012229	Senior Services Associates, Inc. 101 South Grove Avenue Elgin, Illinois 60120	509(a)(1)	Requests \$22,425 over one year to continue program enhancements within a senior companion program serving isolated older adults.	1/15/2013	\$22,425
<i>Total Senior Services Associates, Inc. (1 item)</i>					\$22,425
<u>Seniors Assistance Center</u>					
2012222	Seniors Assistance Center 7774 W. Irving Park Road Norridge, Illinois 60706	509(a)(1)	Requests \$46,089 over one year to increase the organization's capacity for effective resource development.	1/15/2013	\$41,089
<i>Total Seniors Assistance Center (1 item)</i>					\$41,089
<u>Swedish Covenant Hospital</u>					
2012031	Swedish Covenant Hospital 5145 North California Avenue Chicago, Illinois 60625	509(a)(1)	One-year grant to expand a program providing post-hospitalization, chronic disease telemedicine support.	1/15/2013	\$20,185
<i>Total Swedish Covenant Hospital (1 item)</i>					\$20,185

Request ID	Organization Name Address	Tax Determination	Project Description	Schedule Date	Amount
<u>Terra Nova Films, Inc.</u>					
2012233	Terra Nova Films, Inc. 9848 South Winchester Avenue Chicago, Illinois 60643	509(a)(1)	Requests \$68,500 for the third and final project year to disseminate its online video resources widely, with a particular focus on reaching Spanish-speaking family caregivers in Chicago and throughout the country.	1/15/2013	\$34,250
2012233	Terra Nova Films, Inc. 9848 South Winchester Avenue Chicago, Illinois 60643	509(a)(1)	Requests \$68,500 for the third and final project year to disseminate its online video resources widely, with a particular focus on reaching Spanish-speaking family caregivers in Chicago and throughout the country.	7/15/2013	\$34,250
<i>Total Terra Nova Films, Inc (2 items)</i>					<u>\$68,500</u>
<u>The Equal Rights Center</u>					
2012211	The Equal Rights Center 11 Dupont Circle NW, Suite 450 Washington, District of Columbia 20036	509(a)(1)	Requests \$30,000 over one year to investigate housing discrimination and promote equal housing opportunities for LGBT older adults.	1/15/2013	\$30,000
<i>Total The Equal Rights Center (1 item)</i>					<u>\$30,000</u>
<u>University of California, San Francisco</u>					
2012195	University of California, San Francisco Office of Sponsored Research Contracts and Grants 3333 California Street Suite 315 San Francisco, California 94118	509(a)(1)	Requests \$109,805 over one year to define a set of quality indicators for home care medicine and begin building a national registry of medical house call practices through which to study care procedures and structures associated with high quality care.	1/15/2013	\$54,902
2012195	University of California, San Francisco Office of Sponsored Research Contracts and Grants 3333 California Street Suite 315 San Francisco, California 94118	509(a)(1)	Requests \$109,805 over one year to define a set of quality indicators for home care medicine and begin building a national registry of medical house call practices through which to study care procedures and structures associated with high quality care.	7/15/2013	\$54,903

Request ID	Organization Name Address	Tax Determination	Project Description	Schedule Date	Amount
<i>Total University of California, San Francisco (2 items)</i>					
<u>University of Chicago</u>					
2012102	University of Chicago 5801 S. Ellis Avenue Chicago, Illinois 60637	509(a)(1)	Requests \$59,781 over one year for improvements to and analysis of the impact of a web-based geriatric diabetes decision support tool.	1/15/2013	\$59,781
<i>Total University of Chicago (1 item)</i>					\$59,781
<u>University of Illinois at Chicago</u>					
2011238	University of Illinois at Chicago Office of the Chancellor 2833 UH MC 102 601 South Morgan Chicago, Illinois 60607-7128	509(a)(1)	Two-year grant for research to test replication strategies for Fit and Strong, an evidence-based exercise program for older adults with osteoarthritis.	7/15/2013	\$33,000
<i>Total University of Illinois at Chicago (1 item)</i>					\$33,000
<u>University of Iowa</u>					
2012225	University of Iowa 100 Gilmore Hall 112 North Capital Street Iowa City, Iowa 52242	509(a)(1)	Requests \$71,532 over one year to compare use and costs of Medicare-funded hospital services among low-income older and disabled adults treated by Federally Qualified Health Centers with those who are not.	7/15/2013	\$36,532
2012225	University of Iowa 100 Gilmore Hall 112 North Capital Street Iowa City, Iowa 52242	509(a)(1)	Requests \$71,532 over one year to compare use and costs of Medicare-funded hospital services among low-income older and disabled adults treated by Federally Qualified Health Centers with those who are not.	1/15/2013	\$35,000
<i>Total University of Iowa (2 items)</i>					\$71,532
<u>University of Massachusetts Boston</u>					
2012046	University of Massachusetts Boston 100 Morrissey Blvd. Boston, Massachusetts 02125-3393	509(a)(1)	Requests \$103,754 over one year to replicate its pension counseling project to help retirees in Illinois, which is not served by a pension counseling program.	1/15/2013	\$51,877
<i>Total University of Massachusetts Boston (1 item)</i>					\$51,877

Request ID	Organization Name Address	Tax Determination	Project Description	Schedule Date	Amount
Grand Totals (75 items)					\$3,463,279