

Form **990-PF**

OMB No 1545 0047

Return of Private Foundation
or Section 4947(a)(1) Trust Treated as Private Foundation**2019**Department of the Treasury
Internal Revenue Service

- Do not enter social security numbers on this form as it may be made public.
Go to www.irs.gov/Form990PF for instructions and the latest information.

Open to Public Inspection

For calendar year 2019 or tax year beginning , 2019, and ending

RETIREMENT RESEARCH FOUNDATION
 8765 WEST HIGGINS ROAD #430
 CHICAGO, IL 60631-4170

A	Employer identification number 36-2429540
B	Telephone number (see instructions) 773-714-8080
C	If exemption application is pending, check here <input type="checkbox"/> 6
D	1 Foreign organizations, check here <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
E	If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
F	If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

G	Check all that apply	<input type="checkbox"/> Initial return	<input type="checkbox"/> Initial return of a former public charity
		<input type="checkbox"/> Final return	<input type="checkbox"/> Amended return
		<input type="checkbox"/> Address change	<input type="checkbox"/> Name change

H	Check type of organization	<input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation 04
		<input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation

I	Fair market value of all assets at end of year (from Part II, column (c), line 16) \$ 145,836,190.	J	Accounting method <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d), must be on cash basis)
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Part III Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	2,896,588.	2,896,588.		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	7,629,680.			
	b Gross sales price for all assets on line 6a	7,629,680.			
	7 Capital gain net income (from Part IV, line 2)		7,629,680.		
	8 Net short term capital gain				
	9 Income modifications				
Operating and Administrative Expenses	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	SEE STATEMENT 1	340,343.	-401,021.		
	12 Total Add lines 1 through 11	10,866,611.	10,125,247.	0.	
	13 Compensation of officers, directors, trustees, etc	464,355.	78,871.		385,484.
	14 Other employee salaries and wages	737,553.	15,712.		721,841.
	15 Pension plans, employee benefits	300,695.	15,587.		285,108.
	16a Legal fees (attach schedule) SEE ST 2	472.			472.
	b Accounting fees (attach sch) SEE ST 3	34,919.	14,409.		12,730.
	c Other professional fees (attach sch) SEE ST 4	2,215,490.	2,075,617.		139,873.
	17 Interest	272,281.	272,281.		
	18 Taxes (attach schedule)(see instrs) SEE STM 5	310,611.	58,347.		
	19 Depreciation (attach schedule) and depletion	4,127.	413.		
	20 Occupancy	120,283.	12,028.		108,255.
	21 Travel, conferences, and meetings	68,803.	2,527.		66,276.
22 Printing and publications	2,335.	234.		2,101.	
23 Other expenses (attach schedule) SEE STATEMENT 6	225,563.	3,031.		222,532.	
24 Total operating and administrative expenses Add lines 13 through 23	4,757,487.	2,549,057.		1,944,672.	
25 Contributions, gifts, grants paid PART XV	6,618,253.			6,343,487.	
26 Total expenses and disbursements Add lines 24 and 25	11,375,740.	2,549,057.	0.	8,288,159.	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	-509,129.				
b Net investment income (if negative, enter -0-)		7,576,190.			
c Adjusted net income (if negative, enter -0-)			0.		

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions.)		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash – non-interest-bearing	254,362.	270,467.	270,467.
	2 Savings and temporary cash investments			
	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 (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach sch)			
	Less allowance for doubtful accounts			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	157,964.	76,488.	76,488.
	10a Investments – U S and state government obligations (attach schedule)			
	b Investments – corporate stock (attach schedule)	19,968,183.	23,844,518.	23,844,518.
	c Investments – corporate bonds (attach schedule)	8,077,089.	8,840,006.	8,840,006.
	Liabilities	11 Investments – land, buildings, and equipment basis		
Less accumulated depreciation (attach schedule)				
12 Investments – mortgage loans				
13 Investments – other (attach schedule)		107,605,023.	112,793,605.	112,793,605.
14 Land, buildings, and equipment basis		274,208.		
Less accumulated depreciation (attach schedule) SEE STMT 7		263,102.	11,106.	11,106.
15 Other assets (describe)				
16 Total assets (to be completed by all filers – see the instructions Also, see page 1, item I)		136,077,853.	145,836,190.	145,836,190.
17 Accounts payable and accrued expenses		145,510.	174,748.	
18 Grants payable		2,812,620.	3,117,086.	
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe)			
23 Total liabilities (add lines 17 through 22)	2,958,130.	3,291,834.		
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here and complete lines 24, 25, 29, and 30. <input checked="" type="checkbox"/>			
	24 Net assets without donor restrictions	133,119,723.	142,544,356.	
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here and complete lines 26 through 30. <input type="checkbox"/>			
	26 Capital stock, trust principal, or current funds			
	27 Paid-in or capital surplus, or land, bldg, and equipment fund			
	28 Retained earnings, accumulated income, endowment, or other funds			
	29 Total net assets or fund balances (see instructions)	133,119,723.	142,544,356.	
30 Total liabilities and net assets/fund balances (see instructions)	136,077,853.	145,836,190.		

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 29 (must agree with end-of-year figure reported on prior year's return)	1	133,119,723.
2 Enter amount from Part I, line 27a	2	-509,129.
3 Other increases not included in line 2 (itemize) SEE STATEMENT 8	3	9,933,762.
4 Add lines 1, 2, and 3	4	142,544,356.
5 Decreases not included in line 2 (itemize)	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 29	6	142,544,356.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, 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)

1 a SEE STATEMENT 9

b

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

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

(i) FMV 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

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

7,629,680.

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) See instructions If (loss), enter -0-
in Part I, line 8

3

0.

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 doesn't 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))
2018	6,206,447.	142,884,944.	0.043437
2017	7,413,769.	140,003,872.	0.052954
2016	7,039,621.	131,790,163.	0.053415
2015	6,724,390.	138,014,748.	0.048722
2014	6,521,069.	135,039,258.	0.048290

2 Total of line 1, column (d)

2

0.246818

3 Average distribution ratio for the 5-year base period — divide the total on line 2 by 5 0, or by the number of years the foundation has been in existence if less than 5 years

3

0.049364

4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5

4

141,473,765.

5 Multiply line 4 by line 3

5

6,983,711.

6 Enter 1% of net investment income (1% of Part I, line 27b)

6

75,762.

7 Add lines 5 and 6

7

7,059,473.

8 Enter qualifying distributions from Part XII, line 4

8

8,288,159.

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)

1 a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> 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 <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	75,762.
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)		2	0.
3 Add lines 1 and 2		3	75,762.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-.		5	75,762.
6 Credits/Payments			
a 2019 estimated tax pymts and 2018 overpayment credited to 2019	6 a	104,563.	
b Exempt foreign organizations – tax withheld at source	6 b		
c Tax paid with application for extension of time to file (Form 8868)	6 c	10,000.	
d Backup withholding erroneously withheld	6 d		
7 Total credits and payments Add lines 6a through 6d	7	114,563.	
8 Enter any penalty for underpayment of estimated tax Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8		
9 Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed	9	0.	
10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	38,801.	
11 Enter the amount of line 10 to be Credited to 2020 estimated tax <input type="checkbox"/> 38,801. Refunded <input type="checkbox"/>	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1 a 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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition		X
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?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ \$ 0. (2) On foundation managers ▶ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If 'Yes,' attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	X	
b If 'Yes,' has it filed a tax return on Form 990-T for this year?	X	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If 'Yes,' attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, col (c), and Part XV	X	
8 a 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	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2019 or the tax year beginning in 2019? See the instructions for Part XIV If 'Yes,' complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses		X

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Part VII-A. Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes,' attach schedule. See instructions.	11	X
12 Did the foundation 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>MARY O'DONNELL</u> Telephone no <u>773-714-8080</u> Located at <u>8765 W HIGGINS RD., STE 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. <u>N/A</u> and enter the amount of tax-exempt interest received or accrued during the year <u>15</u> <u>N/A</u>		
16 At any time during calendar year 2019, 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?	16	X
See the instructions for exceptions and filing requirements for FinCEN Form 114. If 'Yes,' enter the name of the foreign country.		

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
1 a 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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. <input type="checkbox"/>	1 b	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 2019?	1 c	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 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If 'Yes,' list the years <u>20</u> <u>20</u> <u>20</u> <u>20</u>		
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.)	2 b	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 <u>20</u> <u>20</u> <u>20</u> <u>20</u>		
3 a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If 'Yes,' did it have excess business holdings in 2019 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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.)	3 b	N/A
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4 a	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 2019?	4 b	X

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

5 a 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 4945(d)(4)(A)? See instructions

☐ 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

5 b 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)

6 a 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?

6 b X

If 'Yes' to 6b, file Form 8870

7 a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If 'Yes,' did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7 b

8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration

or excess parachute payment(s) during the year?

☐ Yes ☒ No**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** SEE STATEMENT 10

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

(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 11				
		464,355.	36,278.	0.

2 Compensation of five highest-paid employees (other than those included on line 1 – see instructions). 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 OFFIC 40	177,968.	26,695.	0.
JULIE KAUFMAN PHD C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	PROGRAM OFFIC 40	118,719.	17,808.	0.
MARY O'DONNELL C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	PRESIDENT 40	155,311.	23,297.	0.
MICHAEL KENNEDY C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	GRANTS & TECH 40	65,064.	9,760.	0.
MARCIA KUNSTLER C/O RRF 8765 W HIGGINS #430 CHICAGO, 60631 60631	OFFICE ADMINI 40	78,558.	11,784.	0.

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

0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services. See instructions. 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 TYRON ST CHARLOTTE, NC 28202	INVESTMENT MGMT	1,980,655.
NAOMI M STANHAUS 720 N LARABEE ST., #204 CHICAGO, IL 60654	PROGRAM CONSULTANT	129,125.
MID-CONTINENT CAPITAL 123 N WACKER DR., #1100 CHICAGO, IL 60606	INVESTMENT MGMT	94,962.
Total number of others receiving over \$50,000 for professional services		0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

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

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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	1 a	143,186,220.
b	Average of monthly cash balances	1 b	441,968.
c	Fair market value of all other assets (see instructions)	1 c	
d	Total (add lines 1a, b, and c)	1 d	143,628,188.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1 e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	143,628,188.
4	Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	2,154,423.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	141,473,765.
6	Minimum investment return. Enter 5% of line 5	6	7,073,688.

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	7,073,688.
2a	Tax on investment income for 2019 from Part VI, line 5	2 a	75,762.
b	Income tax for 2019 (This does not include the tax from Part VI.)	2 b	117,678.
c	Add lines 2a and 2b	2 c	193,440.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	6,880,248.
4	Recoveries of amounts treated as qualifying distributions	4	78,982.
5	Add lines 3 and 4	5	6,959,230.
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	6,959,230.

Part XIII **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	1 a	8,288,159.
b	Program-related investments — total from Part IX-B	1 b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3 a	
b	Cash distribution test (attach the required schedule)	3 b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	8,288,159.
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. See instructions.	5	75,762.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	8,212,397.

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7				6,959,230.
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only			0.	
b Total for prior years 20 __, 20 __, 20 __		0.		
3 Excess distributions carryover, if any, to 2019				
a From 2014				
b From 2015				
c From 2016	162,669.			
d From 2017	492,404.			
e From 2018				
f Total of lines 3a through e	655,073.			
4 Qualifying distributions for 2019 from Part XII, line 4 ▶ \$ 8,288,159.				
a Applied to 2018, 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 2019 distributable amount				6,959,230.
e Remaining amount distributed out of corpus	1,328,929.			
5 Excess distributions carryover applied to 2019 (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	1,984,002.			
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 2018 Subtract line 4a from line 2a Taxable amount — see instructions			0.	
f Undistributed income for 2019 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2020				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required — see instructions)	0.			
8 Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions)	0.			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	1,984,002.			
10 Analysis of line 9				
a Excess from 2015				
b Excess from 2016	162,669.			
c Excess from 2017	492,404.			
d Excess from 2018				
e Excess from 2019	1,328,929.			

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

- 1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2019, enter the date of the ruling
- b Check box to indicate whether the foundation is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2019	(b) 2018	(c) 2017	(d) 2016	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4, for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a 'Assets' alternative test — enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b 'Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, line 6, for each year listed					
c 'Support' alternative test — enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

- a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))
- NONE

- b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest
- NONE

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

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

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

SEE STATEMENT 12

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

SEE STATEMENT FOR LINE 2A

- c Any submission deadlines

SEE STATEMENT FOR LINE 2A

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

SEE STATEMENT FOR LINE 2A

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
<i>a Paid during the year</i>				
GRANTS PAID FOR GENERAL FUNDING	NONE	PC	SEE ATTACHMENT A	6,128,687.
MATCHING GIFTS PROGRAM	NONE	PC	SEE ATTACHMENT C	214,800.
Total				6,343,487.
<i>b Approved for future payment</i>				
GRANTS PAID TO GENERAL FUNDING	NONE	PC	SEE ATTACHMENT B	3,117,086.
Total				3,117,086.

Part XVI-A	Analysis of Income-Producing Activities
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Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	2,896,588.	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	7,629,680.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a K-1 ORDINARY & OTHER INC			14	-401,021.	
b NON-TAXABLE INCOME			14	-25,775.	
c RETURNED GRANTS					78,982.
d UNRELATED BUSINESS INCOME	523000	688,157.			
e					
12 Subtotal Add columns (b), (d), and (e)		688,157.		10,099,472.	78,982.
13 Total. Add line 12, columns (b), (d), and (e)				13	10,866,611.

(See worksheet in line 13 instructions to verify calculations)

Part XVI-B. Relationship of Activities to the Accomplishment of Exempt Purposes
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[illegible]

RETIREMENT RESEARCH FOUNDATION

36-2429540

STATEMENT 1
FORM 990-PF, PART I, LINE 11
OTHER INCOME

	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
K-1 ORDINARY & OTHER INC	\$ -401,021.	\$ -401,021.	
NON-TAXABLE INCOME	-25,775.		
RETURNED GRANTS	78,982.		
UNRELATED BUSINESS INCOME	688,157.		
TOTAL	<u>\$ 340,343.</u>	<u>\$ -401,021.</u>	<u>\$ 0.</u>

STATEMENT 2
FORM 990-PF, PART I, LINE 16A
LEGAL FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
	\$ 472.			\$ 472.
TOTAL	<u>\$ 472.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 472.</u>

STATEMENT 3
FORM 990-PF, PART I, LINE 16B
ACCOUNTING FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
AUDITING FEES	\$ 16,100.	\$ 4,000.		\$ 10,000.
BOOKKEEPING, PAYROLL, AND TAX SERVICES	18,819.	10,409.		2,730.
TOTAL	<u>\$ 34,919.</u>	<u>\$ 14,409.</u>	<u>\$ 0.</u>	<u>\$ 12,730.</u>

STATEMENT 4
FORM 990-PF, PART I, LINE 16C
OTHER PROFESSIONAL FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT MANAGEMENT, GLOBAL ENDOW FD	\$ 1,980,655.	\$ 1,980,655.		
INVESTMENT MANAGEMENT, MID CONTINENT	94,962.	94,962.		
PROGRAM GRANT EVALUATION CONSULTANTS	139,873.			\$ 139,873.
TOTAL	<u>\$ 2,215,490.</u>	<u>\$ 2,075,617.</u>	<u>\$ 0.</u>	<u>\$ 139,873.</u>

RETIREMENT RESEARCH FOUNDATION

36-2429540

STATEMENT 5
FORM 990-PF, PART I, LINE 18
TAXES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EXCISE TAX	\$ 75,762.			
FEDERAL INCOME TAX	117,678.			
IL INCOME TAX	58,824.			
TAX ON FOREIGN DIVIDENDS	58,347.	\$ 58,347.		
TOTAL	<u>\$ 310,611.</u>	<u>\$ 58,347.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>

STATEMENT 6
FORM 990-PF, PART I, LINE 23
OTHER EXPENSES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
COMPUTER EXPENSE	\$ 173,657.			\$ 173,657.
DUES & MEMBERSHIPS	12,715.			12,715.
INSURANCE	22,687.	\$ 2,269.		20,418.
OFFICE SUPPLIES & EXPENSE	15,880.	700.		15,180.
POSTAGE & SHIPPING	624.	62.		562.
TOTAL	<u>\$ 225,563.</u>	<u>\$ 3,031.</u>	<u>\$ 0.</u>	<u>\$ 222,532.</u>

STATEMENT 7
FORM 990-PF, PART II, LINE 14
LAND, BUILDINGS, AND EQUIPMENT

CATEGORY	BASIS	ACCUM. DEPREC.	BOOK VALUE	FAIR MARKET VALUE
FURNITURE AND FIXTURES	\$ 94,186.	\$ 87,848.	\$ 6,338.	\$ 4,768.
MACHINERY AND EQUIPMENT	180,022.	175,254.	4,768.	6,338.
TOTAL	<u>\$ 274,208.</u>	<u>\$ 263,102.</u>	<u>\$ 11,106.</u>	<u>\$ 11,106.</u>

STATEMENT 8
FORM 990-PF, PART III, LINE 3
OTHER INCREASES

NET UNREALIZED GAINS OR LOSSES ON INVESTMENTS	
TOTAL	<u>\$ 9,933,762.</u>

RETIREMENT RESEARCH FOUNDATION

36-2429540

STATEMENT 9

FORM 990-PF, PART IV, LINE 1

CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

ITEM	(A) DESCRIPTION	(B) HOW ACQUIRED	(C) DATE ACQUIRED	(D) DATE SOLD
1	MANAGED TRADES FROM MCC CAPITAL MGMT	PURCHASED		
2	FROM FORM K-1 GLOBAL ENDOWMENT FUND II	PURCHASED		
3	FROM FORM K-1 GLOBAL ENDOWMENT FUND II	PURCHASED		
4	FROM FORM K-1 GLOBAL ENDOWMENT FUND II	PURCHASED		
5	FROM FORM K-1 GLOBAL ENDOWMENT FUND II	PURCHASED		
6	FROM FORM K-1 GLOBAL ENDOWMENT FUND II	PURCHASED	3/31/2019	9/30/2019

ITEM	(E) GROSS SALES	(F) DEPREC. ALLOWED	(G) COST BASIS	(H) GAIN (LOSS)	(I) FMV 12/31/69	(J) ADJ. BAS. 12/31/69	(K) EXCESS (I) - (J)	(L) GAIN (LOSS)
1	1324561.		0.	1324561.				\$ 1324561.
2	738,290.		0.	738,290.				738,290.
3	3619725.		0.	3619725.				3619725.
4	96,695.		0.	96,695.				96,695.
5	1519582.		0.	1519582.				1519582.
6	330,827.		0.	330,827.				330,827.
TOTAL								\$ 7629680.

STATEMENT 10

FORM 990-PF, PART VIII

COMPENSATION EXPLANATION

DOWNEY R VAREY

MR VAREY'S COMPENSATION AS TRUSTEE FOR THE YEAR ENDED 12/31/18 TOTALED \$29,000. MR. VAREY WAS ALSO PAID FOR ACCOUNTING, CONSULTING AND TAX RELATED FEES TOTALING \$10,000 FOR THE YEAR ENDED 12/31/18.

STATEMENT 11

FORM 990-PF, PART VIII, LINE 1

LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED	COMPEN- SATION	CONTRI- BUTION TO EBP & DC	EXPENSE ACCOUNT/ OTHER
JOHN BOUMAN C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TRUSTEE 6.00	\$ 16,500.	\$ 0.	\$ 0.
RUTH ANN WATKINS C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	CHAIRPERSON 9.00	35,500.	0.	0.
MICHAEL J STARSHAK C/O RRF 8765 W HIGGINS CHICAGO, IL 60631	SECRETARY 6.00	27,500.	0.	0.
DOWNEY R VAREY C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TREASURER 6.00	27,500.	0.	0.

RETIREMENT RESEARCH FOUNDATION

36-2429540

STATEMENT 11 (CONTINUED)
 FORM 990-PF, PART VIII, LINE 1
 LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED	COMPEN- SATION	CONTRI- BUTION TO EBP & DC	EXPENSE ACCOUNT/ OTHER
IRENE FRYE C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	PRESIDENT 40.00	\$ 241,855.	\$ 36,278.	\$ 0.
MARILYN HENNESSY C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TRUSTEE 2.00	2,000.	0.	0.
THOMAS R PROHASKA, PH D C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TRUSTEE 6.00	21,500.	0.	0.
ANTHONY PERRY C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TRUSTEE 6.00	21,500.	0.	0.
KATHLEEN W KOLODGY C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TRUSTEE 6.00	27,500.	0.	0.
THOMAS D KUCZMARSKI C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TRUSTEE 6.00	21,500.	0.	0.
ADRIENNE MIMS C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TRUSTEE 6.00	21,500.	0.	0.
8765 WEST HIGGINS ROAD #430	0	0.	0.	0.
TOTAL		\$ 464,355.	\$ 36,278.	\$ 0.

STATEMENT 12
 FORM 990-PF, PART XV, LINE 2A-D
 APPLICATION SUBMISSION INFORMATION

NAME OF GRANT PROGRAM:

NAME:

CARE OF:

STREET ADDRESS:

CITY, STATE, ZIP CODE:

TELEPHONE:

E-MAIL ADDRESS:

FORM AND CONTENT:

MARY O'DONNELL

RETIREMENT RESEARCH FOUNDATION

8765 W HIGGINS ROAD, STE 430

CHICAGO, IL 60631-4022

773-714-8080

ODONNELL@RRF.ORG

OUR WEBSITE WWW.RRF.ORG CONTAINS THE FORM IN WHICH
 APPLICATIONS SHOULD BE SUBMITTED ALONG WITH ELIGIBILITY
 CRITERIA, EXCLUSIONS, AND LETTERS OF INQUIRY WITH REQUIRED
 INCLUSIONS. WEB INQUIRIES SHOULD BE ADDRESSED TO
 INFO@RRF.ORG. APPLICATION FORMS CAN BE DOWNLOADED IN WORD
 FOR COMPLETION.

STATEMENT 12 (CONTINUED)
FORM 990-PF, PART XV, LINE 2A-D
APPLICATION SUBMISSION INFORMATION

SUBMISSION DEADLINES: FEBRUARY 1, MAY 1, AND AUGUST 1
RESTRICTIONS ON AWARDS: OUR WEBSITE WWW.RRF.ORG CONTAINS THE ELIGIBILITY
REQUIREMENTS, RESTICTIONS OR LIMITATIONS FOR ALL MAJOR
GRANT PROGRAMS. THE MAJOR GRANT PROGRAMS ARE AS FOLLOWS:
ADVOCACY; DIRECT SERVICE; PROFESSIONAL EDUCATION;
RESEARCH; ORGANIZATIONAL CAPACITY BUILDING STANDARD GRANTS
AND ORGANIZATIONAL CAPACITY BUILDING FLEX-FUND GRANTS.

Recipient Name and Address	Relationship	Foundation Status of Recipient	Purpose of Grant	Amount
A. T. Still University of Health Sciences 800 West Jefferson Kirksville, Missouri 63501-1443	NONE	PC	A third-year grant to deliver oral health education, dental services, and a long-term dental home for older people in the St. Louis area	\$20,323
AARP Foundation 601 East Street, NW Washington, DC 20049	NONE	PC	An 18-month grant to develop educational videos for informal caregivers who must manage complex medical equipment in caring for older adults	\$88,375
AARP Foundation 601 East Street, NW Washington, DC 20049	NONE	PC	An 18-month grant to develop educational videos for informal caregivers who must manage complex medical equipment in caring for older adults	\$88,375
AgeOptions, Inc. 1048 Lake Street, Suite 300 Oak Park, Illinois 60301	NONE	PC	A one-year grant for continued support of the Make Medicare Work Coalition (MMW) to help older Illinoisans access affordable healthcare and use their benefits effectively, and to implement the first year of a business plan to sustain MMW	\$75,000
AgeOptions, Inc. 1048 Lake Street, Suite 300 Oak Park, Illinois 60301	NONE	PC	A one-year grant for continued support of the Make Medicare Work Coalition (MMW) to help older Illinoisans access affordable healthcare and use their benefits effectively, and to implement the first year of a business plan to sustain MMW	\$50,000
Aging Care Connections 111 West Harris Avenue La Grange, Illinois 60525	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$5,000
AIDS Foundation of Chicago 200 W. Monroe Street, Suite 1150 Chicago, Illinois 60606	NONE	PC	A one-year grant to raise awareness about the unique needs and rights of LGBTQ older adults living in long-term care facilities	\$40,000
Alliance for Aging Research 1700 K Street NW, Suite 740 Washington, DC 20006	NONE	PC	A one-year grant for 2019 membership support	\$30,000
Alliance for Aging, Inc. 760 NW 107th Ave., Suite 214 Miami, Florida 33172-3155	NONE	PC	A one-year grant to deliver the Chronic Disease Self Management Program to Creole-speaking older persons	\$20,562
Antioch Area Healthcare Accessibility Alliance 874 Main Street Antioch, Illinois 60002-1509	NONE	PC	A second-year grant to increase community-dwelling older adults' access to health-related services	\$25,000
Antioch Area Healthcare Accessibility Alliance 874 Main Street Antioch, Illinois 60002-1509	NONE	PC	A third-year grant to increase access to health-related services for community-dwelling older adults	\$32,000
Antioch Area Healthcare Accessibility Alliance 874 Main Street Antioch, Illinois 60002-1509	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$5,000
Arab American Family Services 7000 W. 111th Street, Suite 300 Worth, Illinois 60482	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$5,000
Arts At Large, Inc. 1100 South 5th Street Milwaukee, Wisconsin 53204	NONE	PC	A one-year grant to engage older artists in meaningful work experiences where they can serve as mentors to younger artists, share their art with people experiencing memory loss, and conduct workshops and performances for community residents	\$20,000
Barrington Area Council on Aging 6000 Garlands Lane, Suite 100 Barrington, Illinois 60010	NONE	PC	A four-month grant to develop a marketing plan with updated branding and organizational messaging	\$32,049
Barrington Area Council on Aging 6000 Garlands Lane, Suite 100 Barrington, Illinois 60010	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$5,000
Benjamin Rose Institute on Aging 11890 Fairhill Road Cleveland, Ohio 44120-1053	NONE	PC	A 30-month grant to create and market a searchable online resource presenting details about 50 evidence-based dementia caregiving programs to promote their replication and provide families with guidance on where to turn for assistance	\$29,417
Beyond Hunger 848 Lake Street Oak Park, IL 60301	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$5,000
Bosma Industries for the Blind, Inc. 6270 Corporate Drive Indianapolis, Indiana 46278-2921	NONE	PC	A one-year grant to launch a group vision rehabilitation training program for adults 65 and older who are blind and visually impaired	\$51,854
Boston College 140 Commonwealth Avenue Chestnut Hill, Massachusetts 02467	NONE	PC	A two-year grant for research to test the efficacy of a memory strategy that capitalizes on socioemotional processing to benefit the late-life learner	\$33,990
Candid 32 Old Slip, 24th Floor New York, New York 10005-3500	NONE	PC	A one-year grant for 2019 membership support	\$12,000
Catholic Charities of the Archdiocese of Chicago 721 North LaSalle Street Chicago, Illinois 60654-3503	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$5,000

Recipient Name and Address	Relationship	Foundation Status of Recipient	Purpose of Grant	Amount
Catholic Charities of the Diocese of Palm Beach, Inc 9995 North Military Trail Palm Beach Gardens, Florida 33410-5460	NONE	PC	A one-year grant to hire a nurse to expand a respite care program for caregivers of adults residing in St. Lucie County, Florida	\$15,000
Catholic Charities, Inc - Diocese of Madison 702 South High Point Road Madison, Wisconsin 53719	NONE	PC	A one-year grant to provide companion care to older persons living in rural areas	\$25,000
Center for Disability and Elder Law, Inc 205 W Randolph, Suite 1610 Chicago, Illinois 60606-1892	NONE	PC	A three-year grant to allow low-income seniors to meet with pro bono legal services in their own community to have their legal issues evaluated and addressed	\$35,000
Center for Disability and Elder Law, Inc 205 W Randolph, Suite 1610 Chicago, Illinois 60606-1892	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$5,000
Center for Hearing and Speech 9835 Manchester Road St. Louis, Missouri 63119-1243	NONE	PC	A one-year grant to provide full-service audiology, including low-cost hearing aids in a new comprehensive health clinic serving older people	\$30,000
Center of Concern 1665 Elk Boulevard Des Plaines, Illinois 60016	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$5,000
Chicago Public Library Foundation 20 N Michigan Avenue, Suite 520 Chicago, Illinois 60602-4811	NONE	PC	A one-year grant to continue building the capacity of and expanding the CyberNavigator program to serve older people	\$35,000
Chinese American Service League, Inc 2141 S Tan Court Chicago, Illinois 60616-1998	NONE	PC	A one-year continuation grant to bring an evidence-based exercise program, EnhanceFitness, to elderly Chinese residents	\$45,000
Chinese American Service League, Inc 2141 S Tan Court Chicago, Illinois 60616-1998	NONE	PC	A seven-month grant to implement a strategic planning process to create a roadmap for the next three years	\$35,000
Chinese American Service League, Inc 2141 S Tan Court Chicago, Illinois 60616-1998	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$5,000
Chinese Mutual Aid Association 1016 West Argyle Street Chicago, Illinois 60640	NONE	PC	A four-month grant for a collaborative project to build the capacity of private pay, in-home care programs targeting Asian-American older adults in Chicago	\$39,164
Chinese Mutual Aid Association 1016 West Argyle Street Chicago, Illinois 60640	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$5,000
CJE SeniorLife 3003 W Touhy Avenue Chicago, Illinois 60645-2833	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$5,000
Coalition of Limited English Speaking Elderly 53 West Jackson Boulevard, Suite 257 Chicago, Illinois 60604-3679	NONE	PC	A one-year continuation grant to strengthen the Language Access Center and expand language assistance services to Medicare and Medicaid populations in Illinois	\$45,000
Columbia University in the City of New York 615 West 131 Street 4th Floor Mail Code 4524 New York, New York 10027-7984	NONE	PC	A one-year grant to strengthen the reporting of journalists by training them on the consequences of loneliness across the life course	\$65,000
Community Adult Day Care 4501 Main Street Downers Grove, Illinois 60515	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$5,000
Concordia University Chicago 7400 Augusta Street River Forest, Illinois 60305	NONE	PC	A six-month grant to guide the Center for Gerontology's strategic planning process	\$21,082
Council on Foundations 1255 23rd Street NW, Suite 200 Washington, DC 20037	NONE	PC	A one-year grant for 2019 membership support	\$17,900
Depression and Bipolar Support Alliance 55 E Jackson Blvd Suite 490 Chicago, Illinois 60604-4396	NONE	PC	A 15-month grant for a peer-support model to enhance primary care depression treatment for older adults	\$53,161
Education Development Center, Inc 43 Foundry Avenue Waltham, Massachusetts 2453	NONE	PC	An 18-month grant to develop and pilot test an online training curriculum for Emergency Medical Service providers to help them identify patients at risk for elder abuse and report appropriately to adult protective services	\$70,000
ElderCARE@ChristChurch 410 Grand Avenue Waukegan, Illinois 60085	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$5,000
ElderServe, Inc 215 West Breckinridge Street Louisville, Kentucky 40203	NONE	PC	A one-year grant to expand the organization's wellness programs by adding Matter of Balance falls prevention training	\$29,487

Recipient Name and Address	Relationship	Foundation Status of Recipient	Purpose of Grant	Amount
Escorted Transportation Service Northwest 1801 W Central Road Arlington Heights, Illinois 60005-2410	NONE	PC	A six-month grant to engage a consultant to build the organization's fundraising capacity	\$5,000
Escorted Transportation Service Northwest 1801 W Central Road Arlington Heights, Illinois 60005-2410	NONE	PC	A six-month grant to engage a consultant for assistance with marketing efforts	\$5,000
Escorted Transportation Service Northwest 1801 W Central Road Arlington Heights, Illinois 60005-2410	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$6,500
Feeding Northeast Florida 1116 Edgewood Avenue North, Units D & E Jacksonville, FL 32254	NONE	PC	A one-year grant for a pilot program designed to reduce food insecurity through food deliveries, replacement of kitchen equipment, nutrition education, and benefits assistance to low-income older people	\$26,708
Florida Health Justice Project, Inc. 3793 Irvington Avenue Miami, Florida 33133			A one-year grant to increase the capacity of advocates to help older people in Miami-Dade County gain access to home- and community-based services	\$35,000
Food Research and Action Center 1200 18th Street, NW, Suite 400 Washington, DC 20036	NONE	PC	A one-year grant to increase low-income older adults' access to and participation in the SNAP/Food Stamps program	\$41,570
Forefront 208 S LaSalle Street, Suite 1540 Chicago, Illinois 60604	NONE	PC	A one-year grant for 2019 membership support.	\$12,523
Franciscan Alliance, Inc 1515 Dagoon Trail Mishawaka, Indiana 46544	NONE	PC	A one-year grant to provide nutritionally appropriate meals to vulnerable older patients who are being discharged from hospital to home	\$38,500
Generations United 80 F Street, NW Washington DC 20001-1522	NONE	PC	A second-year grant to expand intergenerational programming within senior housing	\$50,000
Generations United 80 F Street NW Washington DC 20001-1522	NONE	PC	A second-year grant to expand intergenerational programming within senior housing	\$60,257
Georgia Hospice and Palliative Care Organization 950 Eagle's Landing Parkway Suite 622 Stockbridge, Georgia 30281	NONE	PC	A one-year grant to assess the effectiveness of a targeted educational program designed to guide families through advance care planning	\$49,450
Grantmakers in Aging c/o CliftonLarsonAllen LLP 901 North Glebe Road, Suite 200 Arlington, Virginia 22203	NONE	PC	A two-month grant to support GIA's annual conference	\$15,000
Grantmakers in Aging c/o CliftonLarsonAllen LLP 901 North Glebe Road Suite 200 Arlington, Virginia 22203	NONE	PC	A one-year grant to support the mobilization of the organization's new strategic plan	\$15,000
Grantmakers in Health 1100 Connecticut Ave NW, Suite 1200 Washington, DC 20036-4110	NONE	PC	A one-year grant for 2019 membership support	\$2,875
Greater Chicago Food Depository 4100 West Ann Lane Place Chicago Illinois 60632	NONE	PC	A five-month grant to conduct a planning project for a prepared meals program low-income older adults	\$45,000
Gulf Coast Jewish Family and Community Services, Inc 14041 Icot Boulevard Clearwater, Florida 33760	NONE	PC	A one-year grant to address social and emotional isolation among older people for in the Tampa Bay region.	\$29,518
HANA Center 4300 N California Avenue Chicago, Illinois 60618-1514	NONE	PC	A one-year grant to expand a program supporting brain health in the Korean-American community and fostering dementia-friendly community spaces	\$26,550
HANA Center 4300 N California Avenue Chicago, Illinois 60618-1514	NONE	PC	A one-year grant to expand a program supporting brain health in the Korean-American community and fostering dementia-friendly community spaces	\$25,000
HANA Center 4300 N California Avenue Chicago, Illinois 60618-1514	NONE	PC	A six-month grant to develop a strategic communications plan	\$5,000
HANA Center 4300 N California Avenue Chicago, Illinois 60618-1514	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$5,000
Hanul Family Alliance 5008 North Kedzie Avenue Chicago, Illinois 60625	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$5,000

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Harmony Community Baptist Church 1908 South Millard Chicago, Illinois 60623	NONE	PC	A one-year grant to expand food pantry services to older persons in the North Lawndale community for older persons who are homebound or have limited mobility	\$15,215
Hartford HealthCare Research Department 80 Seymour Street Hartford Connecticut 06102	NONE	PC	A two-year grant to evaluate whether exposure to multi-sensory stimulation environments can improve clinical and cognitive outcomes in older patients at risk of delirium	\$59,745
Home Centered Care Institute 1900 East Golf Road, Suite 480 Schaumburg, Illinois 60173	NONE	PC	An 18-month grant to build a network of well-trained, home-based primary care providers in Florida	\$70,000
Housing Opportunities and Maintenance for the Elderly 1419 West Carroll Avenue, FL 2 Chicago, Illinois 60607	NONE	PC	A one-year grant to partner with Rush University Medical Center to replicate the Community Aging in Place-Advancing Better Living for Elders program (CAPABLE) with clients of H O M E 's Upkeep & Repair Service	\$25,000
Housing Opportunities and Maintenance for the Elderly 1419 West Carroll Avenue, FL 2 Chicago, Illinois 60607	NONE	PC	A one-year grant to partner with Rush University Medical Center to replicate the Community Aging in Place-Advancing Better Living for Elders program (CAPABLE) with clients of H O M E 's Upkeep & Repair Service	\$25,000
Housing Opportunities and Maintenance for the Elderly 1419 West Carroll Avenue, FL 2 Chicago, Illinois 60607	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$5,000
Housing Options Provided for the Elderly, Inc 7300 Dartmouth Avenue, Suite 100 University City, Missouri 63130	NONE	PC	A third- year grant to counsel older homeowners homeowners who may default on their Home Equity Conversion Mortgage and train 40 additional housing counselors to counsel borrowers who are in arrears	\$37,500
Housing Options Provided for the Elderly, Inc 7300 Dartmouth Avenue, Suite 100 University City, Missouri 63130	NONE	PC	A third- year grant to counsel older homeowners homeowners who may default on their Home Equity Conversion Mortgage and train 40 additional housing counselors to counsel borrowers who are in arrears	\$37,500
Housing Options Provided for the Elderly, Inc 7300 Dartmouth Avenue, Suite 100 University City, Missouri 63130	NONE	PC	A one-year grant to continue counseling older homeowners at risk of defaulting on a Home Equity Conversion Mortgage and provide technical assistance and training to additional housing counseling agencies that assist older borrowers at risk of foreclosure	\$37,500
Howard Brown Health 4025 North Sheridan Road Chicago, Illinois 60613-2010	NONE	PC	A one-year grant to advance programming for LGBTQ older adults	\$45,072
Illinois Partners for Human Service 33 West Grand Avenue, Suite 300 Chicago, Illinois 60654	NONE	PC	A six-month grant to engage a consultant to work on succession planning	\$5,000
Illinois Partners for Human Service 33 West Grand Avenue, Suite 300 Chicago, Illinois 60654	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$5,000
Independence Health & Therapy 2028 North Seminary Avenue Woodstock, Illinois 60098	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$5,000
International Institute of Metro St. Louis 3401 Arsenal St. Charles, Missouri 63301	NONE	PC	A one-year grant to reduce the impact of depression and isolation for foreign-born elders in the St. Louis region by increasing access to mental health services and socialization opportunities	\$49,844
Iowa CareGivers 939 Office Park Road #332 West Des Moines, Iowa 50265	NONE	PC	An 18-month grant to ensure that older Iowans receive access to good oral healthcare by maximizing the capacity, impact, and sustainability of a state-recognized, competency-based training program for direct care workers	\$60,000
Iowa Legal Aid 1111 9th Street, Suite 230 Des Moines, Iowa 50314	NONE	PC	A one-year grant to enhance services provided through the organization's Legal Hotline and improve the delivery of legal services for older people	\$32,096
Jane Addams Senior Caucus 1111 N Wells, Suite 302 Chicago, Illinois 60610-3445	NONE	PC	A two-year grant for local advocacy with the Chicago Housing Authority, to provide Language Access Assistance Services for older CHA tenants with limited proficiency in English	\$25,000
Jane Addams Senior Caucus 1111 N Wells, Suite 302 Chicago, Illinois 60610-3445	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$5,000
Jewish Community Centers Association 2 Millstone Campus Drive St. Louis, Missouri 63146-5796	NONE	PC	A one-year grant to implement an Intergenerational Horticulture Therapy program for adult day center clients and preschool children	\$40,000
JourneyCare Foundation 2050 Claire Court Glenview, Illinois 60025-7635	NONE	PC	A 17-month grant to pilot a home-based primary care program for older people with multiple chronic diseases who have difficulty accessing care in traditional office settings	\$37,500
Justice in Aging 1444 Eye Street NW, Suite 1100 Washington, DC 20005			A one-year grant to continue advocacy efforts that decrease improper billing and increase access to health care for low income adults who are dually eligible for Medicare and Medicaid	\$40,000
Kenneth Young Center 1001 Rohlfing Road Elk Grove Village, IL 60007	NONE	PC	A six-month grant to engage a consultant to help KYC leadership identify and prioritize organizational capacity building needs moving forward	\$5,000

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Kenneth Young Center 1001 Rohlfing Road Elk Grove Village, IL 60007	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$5,000
Kenwood Oakland Community Organization 4242 S Cottage Grove Avenue Chicago, Illinois 60653	NONE	PC	A one-year grant to continue tenant organizing in senior public housing developments and train older residents to advocate effectively for the creation and preservation of affordable housing	\$50,000
Lakeview Pantry 3945 North Sheridan Road Chicago, Illinois 60613-2936	NONE	PC	A one-year grant to continue to provide two weeks-worth of fresh, nutritious and diet appropriate groceries to a mostly elderly and disabled population once per month. In the most recent fiscal year, this program served 341 individuals in 296 households and made more than 2,400 deliveries	\$18,500
Lakeview Pantry 3945 North Sheridan Road Chicago, Illinois 60613-2936	NONE	PC	A one-year grant to continue delivery of fresh groceries to low-income, homebound older people in Chicago and provide in-home case management services to them	\$15,000
Latino Alzheimer's and Memory Disorders Alliance 6112 West Cermak Road Cicero, Illinois 60706-1054	NONE	PC	A third-year grant to continue the expansion of its dementia support services at the Cicero/Berwyn site	\$39,523
Latino Alzheimer's and Memory Disorders Alliance 6112 West Cermak Road Cicero, Illinois 60706-1054	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$5,000
Lawndale Christian Health Center 3860 W Ogden Chicago, Illinois 60623	NONE	PC	A one-year grant to support organizational planning to become the first PACE (Program All-Inclusive Care for the Elderly) provider in Illinois	\$70,000
Legal Aid Society of Palm Beach County, Inc 423 Fern Street, Suite 200 West Palm Beach, Florida 33401-5839	NONE	PC	A one-year grant to continue providing civil legal services and education to Palm Beach County older veterans in the areas of benefits, justice, and estate planning advocacy	\$25,000
Legal Aid Society of Palm Beach County, Inc 423 Fern Street Suite 200 West Palm Beach, Florida 33401-5839	NONE	PC	A third-year grant to provide legal services in the areas of benefits, justice, estate planning, and education for older veterans in Palm Beach County	\$50,000
Legal Council for Health Justice 17 N State Street, Suite 900 Chicago Illinois 60602-3569	NONE	PC	A one-year grant to continue advocacy to protect the rights of seniors receiving Medicaid in Illinois	\$25,000
Legal Council for Health Justice 17 N State Street Suite 900 Chicago, Illinois 60602-3569	NONE	PC	A third-year grant to continue advocacy addressing threats to Medicaid that may limit the ability of older people to receive home- and community-based services	\$25,000
Life Matters Media, Inc 517 N Racine Avenue, Unit 2 Chicago, Illinois 60642-5894	NONE	PC	A third-year grant for a project focused on encouraging advance care planning among older adults in the Chatham neighborhood	\$21,666
Little Brothers - Friends of the Elderly 355 North Ashland Avenue Chicago Illinois 60607	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$6,500
Little City Foundation 1760 West Algonquin Road RDC Administration Bldg Palatine, Illinois 60067	NONE	PC	A one-year grant to implement It's Never 2 Late technology to improve the quality of life and well-being of older residents with intellectual and developmental disabilities	\$25,070
Little Sisters of the Poor, St Joseph's Home for the Elderly 80 West Northwest Highway Palatine, Illinois 60067-3582	NONE	PC	A one-year grant to meet the needs of 30 independent living residents to enable them to live independently for as long as possible	\$45,790
Lynx Opera of Chicago 20 North Wacker Drive Suite 860 Chicago Illinois 60606	NONE	PC	Requests \$10,000 over one year to welcome older Chicagoans from diverse neighborhoods to the Lynx Opera for an afternoon of world-class opera (Verdi's Luisa Miller) and positive social enrichment	\$7,500
Maplewood Housing for the Visually Impaired dba Friedman Place 5527 N Maplewood Avenue Chicago, Illinois 60625	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$5,000
McGaw YMCA 1000 Grove Street Evanston, Illinois 60201	NONE	PC	A six-month grant to engage a consultant on program development for older adults in the organization's low-income housing building	\$5,000
McGaw YMCA 1000 Grove Street Evanston, Illinois 60201	NONE	PC	A one-year grant to improve the delivery of services for older people living in an affordable housing building	\$29,700
Meals at Home, dba Meals On Wheels Northeastern Illinois 1723 Simpson St Evanston, Illinois 60201	NONE	PC	A one-year grant to enhance the organization's information management and technology infrastructure	\$15,000
Meals at Home, dba Meals On Wheels Northeastern Illinois 1723 Simpson St Evanston, Illinois 60201	NONE	PC	A one-year grant to enhance the organization's information management and technology infrastructure	\$13,378
Meals at Home, dba Meals On Wheels Northeastern Illinois 1723 Simpson St Evanston, Illinois 60201			A one-month matching grant in conjunction with IL Give 2019	\$5,000

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Meals on Wheels Foundation of Northern Illinois 7222 West Cermak Road, Suite 302 North Riverside, Illinois 60546	NONE	PC	A one-year grant to provide partial support for a new outreach and volunteer coordinator position to improve recruitment, training, management, and retention of volunteers	\$25,000
Meals On Wheels of Sheboygan County, Inc 1004 S Taylor Drive Sheboygan, Wisconsin 53081-4773	NONE	PC	A one-year grant to implement an inter-professional, holistic approach for in-home assessment of falls, medication risk, and mental health screening for older clients of the Fresh Meals On Wheels Program	\$39,125
Meals On Wheels of Sheboygan County, Inc 1004 S Taylor Drive Sheboygan, Wisconsin 53081-4773	NONE	PC	A second-year grant to expand an inter-professional, in-home program involving multi-dimension health screenings for older clients of Fresh Meals On Wheels	\$33,465
Medicare Rights Center 266 West 37th Street, 3rd Floor New York, New York 10018-6609	NONE	PC	A one-year grant to continue working in partnership with the Center for Medicare Advocacy to protect access to quality healthcare coverage for older Americans	\$46,000
Medicare Rights Center 266 West 37th Street, 3rd Floor New York, New York 10018-6609	NONE	PC	A one-year grant to continue working in partnership with the Center for Medicare Advocacy to protect access to quality healthcare coverage for older Americans	\$45,500
Medicare Rights Center 266 West 37th Street, 3rd Floor New York, New York 10018-6609	NONE	PC	A one-year grant to continue advocacy efforts to protect and strengthen national health insurance programs for older Americans	\$46,000
Mercy Housing Lakefront 120 S LaSalle Street, Suite 1850 Chicago, Illinois 60603	NONE	PC	A two-year grant to provide gerontology training to service coordinators and case managers in affordable senior housing, to meet the needs of residents who are aging in place	\$20,750
Mercy Housing Lakefront 120 S LaSalle Street, Suite 1850 Chicago, Illinois 60603	NONE	PC	A two-year grant to provide gerontology training to service coordinators and case managers in affordable senior housing, to meet the needs of residents who are aging in place	\$20,750
Mercy Housing Lakefront 120 S LaSalle Street, Suite 1850 Chicago, Illinois 60603	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$5,000
Mercy Medical Center - Des Moines 411 Laurel Street, Suite 2250 Des Moines, Iowa 50314	NONE	PC	A one-year grant to support implementation of a new community paramedicine program for individuals over age 65 suffering from congestive heart failure	\$37,067
Miami University Scripps Gerontology Center 396 Upham Hall 100 Bishop Circle Oxford, Ohio 45056	NONE	PC	An 18-month grant for research to assess 1) how local tax levies that fund services for older adults directly or indirectly affect caregivers' lives, and 2) how these programs could enhance their intentional focus on and effectiveness for caregivers	\$95,508
Miami University Scripps Gerontology Center 396 Upham Hall 100 Bishop Circle Oxford, Ohio 45056	NONE	PC	An 18-month grant for research to assess 1) how local tax levies that fund services for older adults directly or indirectly affect caregivers' lives, and 2) how these programs could enhance their intentional focus on and effectiveness for caregivers	\$50,000
Mid-Florida Area Agency on Aging, Inc d/b/a Elder Options 100 SW 75th Street Suite 301 Gainesville, Florida 32607	NONE	PC	A two-year grant to continue, increase, and sustain Healthy Aging programs	\$50,000
Mount Mary University 2900 North Menomonee River Parkway Milwaukee, Wisconsin 53222-4597	NONE	PC	A one-year grant create a new Virtual Reality Room to integrate virtual reality into the healthcare, science, and design curriculum	\$75,000
Naples Senior Center at JFCS 5025 Castello Drive Naples, Florida 34103	NONE	PC	A one-year grant to offer an early memory loss program for older persons with mild cognitive impairment or very early dementia, or for those with significant concerns about their memory	\$38,500
National Association of Community Health Centers, Inc 7501 Wisconsin Avenue, Suite 1100W Bethesda, Maryland 20814-6593	NONE	PC	A one-year grant to educate and provide technical assistance to engage more Federally Qualified Health Centers to adopt the PACE program to assure integrated care of the growing number of older patients who are low-income and eligible for nursing home care	\$60,000
National Committee for Responsive Philanthropy 1900 L Street NW, Suite 825 Washington, DC 20036	NONE	PC	A one-year grant for 2019 membership support	\$15,000
National Consumer Law Center 7 Winthrop Square, 4th Floor Boston, Massachusetts 02110-1245	NONE	PC	A one-year grant for advocacy addressing reverse mortgage foreclosure policies, and to provide technical assistance to legal service attorneys with cases related to reverse mortgage foreclosure	\$31,214
National Consumer Law Center 7 Winthrop Square, 4th Floor Boston, Massachusetts 02110-1245	NONE	PC	A one-year grant to protect the rights of older adults faced with foreclosure on Home Equity Conversion Mortgages	\$29,923
National Consumer Voice for Quality Long-Term Care 1001 Connecticut Avenue NW, Suite 632 Washington, DC 20036-5508	NONE	PC	A one-year grant for advocacy with CMS to provide clarity around expectations regarding closure of nursing homes in terms of the role of state survey agencies in collaboration with partners sharing of closure plans, and protection of residents' rights throughout the closure and transfer process	\$45,750
Neighborhood Housing Services of Chicago, Inc 1279 North Milwaukee Avenue, 4th Floor Chicago, Illinois 60622	NONE	PC	A one-year grant to provide targeted group based educational workshops and one-on-one counseling that will enable older homeowners to maintain and keep their homes	\$40,000

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North Shore Senior Center 161 Northfield Road Northfield Illinois 60093	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$5,000
North West Housing Partnership 1701 E Woodfield Road, Suite 203 Schaumburg, Illinois 60173	NONE	PC	A two-year grant to pilot a health-housing strategy by implementing a CAPABLE demonstration in Chicago's northwest suburbs	\$40,000
Northwest Side Housing Center 5233 W Diversey Avenue Chicago, Illinois 60639	NONE	PC	A 14-month grant to pilot an intergenerational program designed to improve resilience in older adults	\$30,000
Northwest Side Housing Center 5233 W Diversey Avenue Chicago, Illinois 60639	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$5,000
Northwestern University Office for Sponsored Research (OSR) 750 N Lake Shore Drive, Rubloff 7th Floor Chicago, Illinois 60611	NONE	PC	A two-year grant for research to compare the impact on frailty of a high intensity walking program with a moderate intensity walking program for older residents of an assisted living community	\$70,000
Open Communities 922 Davis Street Evanston, Illinois 60201	NONE	PC	A one-year grant to make housing counseling and outreach services more accessible to older people	\$32,945
Oregon State University Office for Sponsored Research and Award Administration 312 Kerr Administration Building Corvallis, Oregon 97331-2140	NONE	PC	An 18-month grant to develop a psychometrically sound measure of the nature of intergenerational contact for the use of researchers and practitioners	\$39,150
Over the Rainbow Association 2040 Brown Avenue Evanston Illinois 60201	NONE	PC	A one-year grant to begin a gardening program for older residents with physical disabilities to improve their health nutrition, quality of life, and social engagement	\$10,000
Pension Rights Center 1730 M Street NW Suite 1000 Washington, DC 20036-4542	NONE	PC	A second-year grant to continue to protect retirees from potential pension benefit reductions and find solutions to save financially distressed multiemployer pension plans	\$30,000
Pension Rights Center 1730 M Street NW Suite 1000 Washington, DC 20036-4542	NONE	PC	A six-month grant for the planning phase of an initiative to address the challenges that prevent older divorced women from receiving the benefits to which they are legally entitled	\$10,000
Pension Rights Center 1730 M Street NW, Suite 1000 Washington, DC 20036-4542	NONE	PC	A one-year grant to continue advocating for a comprehensive solution to the multi-employer crisis to fix underfunded pension plans and protect retirees' hard-earned pensions	\$30,000
Prairie State Legal Services, Inc 303 North Main Street, Suite 600 Rockford, Illinois 61101	NONE	PC	A one-year grant to support a new, full-time paralegal position to assist attorneys in handling complex Medicaid long-term care cases	\$54,808
Prairie State Legal Services, Inc 303 North Main Street, Suite 600 Rockford, Illinois 61101	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$6,500
Public Interest Law Initiative 105 West Madison Street Suite 610 Chicago, Illinois 60602	NONE	PC	A one-year grant to support a legal aid intern who will provide legal assistance in the areas of housing, financial stability, end-of-life planning, and/or financial exploitation and abuse to older persons	\$6,600
Revitalize Milwaukee 840 N Old World Third Street, Suite 600 Milwaukee, Wisconsin 53203	NONE	PC	A three-year grant to continue providing minor repairs and home maintenance to low-income older homeowners who are committed to aging in place in their neighborhoods	\$40,000
Rush University Medical Center 1645 West Jackson Chicago, Illinois 60612	NONE	PC	A one-year grant to create support for family caregivers throughout the Rush health system by standardizing processes to identify them, assess their needs, and provide relevant services and resources	\$52,247
Saint John's Community Care 222 Goethe Ave Collinsville, Illinois 62234-3306	NONE	PC	A two-year grant to continue a pilot program for older adults with early stage dementia and their caregivers	\$25,445
Saint John's Community Care 222 Goethe Ave Collinsville, Illinois 62234-3306	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$5,000
SASI Serving Adults Supporting Independence 1123 Emerson Street, Suite 200 Evanston, Illinois 60201	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$5,000
SeniorAge Area Agency on Aging 1735 S Fort Avenue Springfield, Missouri 65807-1204	NONE	PC	A second-year grant to replicate the Stress-Busting Program for Family Caregivers in nine southwest Missouri counties	\$30,918
Services and Advocacy for Gay, Lesbian, Bisexual and Transgender Elders 305 Seventh Avenue, 15th Floor New York, New York 10001	NONE	PC	A two-year grant to build the advocacy and media skills of LGBT older persons who will serve as effective spokespersons about the harms caused by discrimination and the need for LGBT-inclusive aging policies in Florida and Illinois	\$50,000
Shriver Center on Poverty Law 67 East Madison Street, Suite 2000 Chicago Illinois 60603-3014			A one-year grant to train legal aid professionals and tenant groups to advocate for older public housing residents' rights and safety, and for affordable public housing	\$50,000

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Sounds Good Choir, NFP 501 West Ogden Avenue, Suite 6 Hinsdale, Illinois 60521	NONE	PC	A one-year grant to strengthen staffing structure and build capacity for efficient operations	\$39,875
Sounds Good Choir, NFP 501 West Ogden Avenue Suite 6 Hinsdale, Illinois 60521	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$5,000
The Arc of the United States 1825 K Street NW, Suite 1200 Washington, DC 20006	NONE	PC	A third-year grant to continue offering support to older adult caregivers of people with intellectual and developmental disabilities	\$50,000
The Arc of the United States 1825 K Street NW, Suite 1200 Washington, DC 20006	NONE	PC	A third-year grant to continue offering support to older adult caregivers of people with intellectual and developmental disabilities	\$22,000
The Chicago School of Professional Psychology 203 North LaSalle Street Suite 1900 Chicago, Illinois 60601	NONE	PC	A second-year grant for mental health services to low-income senior housing residents who have symptoms of a hoarding disorder	\$43,000
The Chicago School of Professional Psychology 203 North LaSalle Street Suite 1900 Chicago, Illinois 60601	NONE	PC	A second-year grant for mental health services to low-income senior housing residents who have symptoms of a hoarding disorder	\$42,790
The Foundation for Post-Acute and Long-Term Care Medicine 10500 Little Patuxent Parkway, Suite 210 Columbia, Maryland 21044	NONE	PC	An 18-month grant to revise clinical practice guidelines on pain, delirium, dementia, and depression and disseminate them to clinicians in post-acute and long-term care settings	\$79,386
The Gerontological Society America 1220 L Street, NW, Suite 901 Washington, DC 20005	NONE	PC	A three-year grant to increase momentum to adopt the principles of Reframing Aging, an initiative of the Leaders of Aging Organizations	\$75,000
The Gerontological Society America 1220 L Street, NW, Suite 901 Washington, DC 20005	NONE	PC	A one-year grant to educate journalists about new scientific findings, social and policy debates, and innovations and solutions for key aging-related issues to better allow them to spread new awareness to the population at large	\$25,000
The Research Foundation of the State University of New York P O Box 9 35 State Street Albany, New York 12201	NONE	PC	A two-year grant to develop an educational intervention to engage older adults in initiating conversations with their physicians about de-prescribing	\$66,667
The University of South Florida Board of Trustees Research & Innovation Office of Sponsored Research 4019 E Fowler Avenue, Suite 100 Tampa, Florida 33617-2008	NONE	PC	A two-year grant to research risks and protective factors leading to different outcomes (functional decline, long-term care placement, and death) between clients receiving services from the aging service provider network and clients on waiting lists for these services	\$75,000
The Village Chicago 2502 North Clark Street, #225 Chicago, Illinois 60614-1850	NONE	PC	A one year grant to expand a co-mentoring program that encourages cross-generational bi-directional learning among older and younger adults	\$70,000
The Village Chicago 2502 North Clark Street #225 Chicago, Illinois 60614-1850	NONE	PC	A one-month matching grant in conjunction with IL Give 2019	\$5,000
TimeSlips Creative Storytelling, Inc 4461 N Lake Dr Milwaukee, Wisconsin 53211-1776	NONE	PC	An 18-month grant to design and pilot test an online Learning Center, aimed at expanding access to an innovative model for dementia care	\$58,865
Toledo Sisters of Notre Dame 3912 Sunforest Court, Suite B Toledo, Ohio 43623			Requests \$10,000 over 8 months to renovate restroom facilities at Notre Dame Academy to meet the accessibility needs of older Sisters	\$10,000
Trustees of Boston University Boston University Grants Receivables P O Box 28763 New York New York 10087-8763	NONE	PC	A one-year grant to address older adult behavioral health needs through an online training program for senior center staff members	\$57,333
Trustees of Boston University Boston University Grants Receivables P O Box 28763 New York, New York 10087-8763	NONE	PC	A one-year grant to continue addressing the behavioral health needs of older adults through competency-based workforce training for Senior Center staff in Illinois, Florida, and Wisconsin	\$50,000
United Cerebral Palsy Seguin of Greater Chicago 3100 South Central Avenue Cicero, Illinois 60804-3956	NONE	PC	A second-year grant to increase the frequency and intensity of nursing care for older group home residents with intellectual or developmental disabilities to promote their independence and enable them to age with dignity	\$36,400
United Way of Miami-Dade, Inc 3250 SW 3rd Avenue Miami, Florida 33129-2712	NONE	PC	A six-month advocacy grant to win state legislative approval to place a referendum on the ballot in Miami-Dade County for passage of a levy-funded senior trust	\$34,650
University of Iowa Grant Accounting Office 118 South Clinton Street Iowa City, Iowa 52242	NONE	PC	An 18-month grant for research to improve the effectiveness of over-the-counter hearing aids	\$57,521

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University of Iowa Grant Accounting Office 118 South Clinton Street Iowa City Iowa 52242	NONE	PC	A 17-month grant to conduct a survey of Medicare/Medicaid certified nursing home social service directors to describe this workforce and determine its training needs	\$40,000
University of Massachusetts Boston Office of Research and Sponsored Programs 100 Morrissey Blvd Boston, Massachusetts 02125-3393	NONE	PC	A one-year grant to provide pension counseling to older individuals in Illinois	\$66,552
University of Massachusetts Boston Office of Research and Sponsored Programs 100 Morrissey Blvd Boston, Massachusetts 02125-3393	NONE	PC	A three-year grant to build sustainability for the Elder Economic Security Standard Index, a unique, geographically-specific measure of the income required for older people to stay in their homes and remain independent.	\$28,496
University of Massachusetts Boston Office of Research and Sponsored Programs 100 Morrissey Blvd Boston Massachusetts 02125-3393	NONE	PC	A three-year grant to build sustainability for the Elder Economic Security Standard Index, a unique, geographically-specific measure of the income required for older people to stay in their homes and remain independent	\$38,791
University of Massachusetts Boston Office of Research and Sponsored Programs 100 Morrissey Blvd Boston, Massachusetts 02125-3393	NONE	PC	A one-year grant to continue to provide expert legal counseling and advocacy for Illinois retirees who need help getting the pension benefits they have earned	\$40,000
University of Minnesota Office of Sponsored Projects Administration 450 McNamara Alumni Center 200 Oak Street S E	NONE	PC	A three-year grant to examine barriers to and strong examples of local and state coordination enabling person-centered, long-term services and supports for financially vulnerable older people financially vulnerable older people	\$59,000
University of South Florida Atrn Research Projects Receivables P O Box 864568 Orlando, Florida 32886-4568	NONE	PC	A two-year grant for pilot research on an intervention to improve older adults' cognitive and motor function	\$44,000
Venice Symphony 1515 S Tamiami Trail Southbridge Park Suite 7 Venice, Florida 34285	NONE	PC	Requests \$10,000 over one year to perform concerts for seniors in memory support facilities in the Venice Florida area	\$10,000
Virginia Commonwealth University 800 East Leigh Street, Suite 3100 P O Box 843039 Richmond, Virginia 23284	NONE	PC	A one-year grant to evaluate the efficacy of a video intervention to disrupt ageism by creating positive changes in attitudes and behaviors about aging among staff working in the continuum of senior residential living	\$46,034
Virginia Commonwealth University 800 East Leigh Street Suite 3100 P O Box 843039 Richmond, Virginia 23284	NONE	PC	A one-year grant to evaluate the efficacy of a video intervention to disrupt ageism by creating positive changes in attitudes and behaviors about aging among staff working in the continuum of senior residential living	\$46,034
Virginia Polytechnic Institute and State University Office of Sponsored Programs North End Center 300 Turner Street NW, Suite 4200 (0170) Blacksburg, Virginia 24060	NONE	PC	An 18-month grant to study the nature, extent, and impact of abuse by perpetrators who are also designated as surrogate decision makers for individuals 65 years and older	\$54,581
Virginia Polytechnic Institute and State University Office of Sponsored Programs North End Center 300 Turner Street NW, Suite 4200 (0170) Blacksburg, Virginia 24060	NONE	PC	An 18-month grant to study the nature, extent, and impact of abuse by perpetrators who are also designated as surrogate decision makers for individuals 65 years and older	\$50,000
Wayne State University Office of Research and Sponsored Programs 5057 Woodward Avenue 13th Floor Detroit, Michigan 48202-4050	NONE	PC	A two-year grant to develop real-world measures of financial management, identify risk factors for fraud and exploitation, and create a motivational interviewing module to help older people protect their finances	\$80,000
White Crane Wellness Center 1657 W Foster Ave Chicago, Illinois 60640-2013	NONE	PC	A third-year grant to continue funding collaborative fall prevention programs	\$25,000
White Crane Wellness Center 1657 W Foster Ave Chicago, Illinois 60640-2013	NONE	PC	A one-year grant to train staff, enhance programming, and improve facilities to meet the needs of Adult Day Services clients with Alzheimer's and other dementias	\$25,000
Wisconsin Institute for Healthy Aging 1414 MacArthur Road, Suite B Madison, Wisconsin 53714	NONE	PC	A one-year grant to design effective referral systems to engage low-income and rural-residing older adults in evidence-based, healthy aging programs	\$40,000
Woodstock Institute 67 East Madison Suite 2108 Chicago Illinois 60603	NONE	PC	A one-year grant to continue promoting financial inclusion for older people	\$15,000
Yale University Office of Sponsored Projects P O Box 1873 New Haven, Connecticut 06508-1873	NONE	PC	A two-year grant to study how highly partnered Area Agencies on Aging establish and maintain collaborative relationships with healthcare partners	\$86,758
				\$6,128,687

Recipient's Name and Address	Relationship	Foundation Status of Recipient	Purpose of Grant	Schedule Date	Amount
AARP Foundation 601 E. Street NW Washington, DC 20049	NONE	PC	An 18-month grant to develop educational videos for informal caregivers who must manage complex medical equipment in caring for older adults	1/15/2020	\$98,376
AgeOptions, Inc. 1048 Lake Street, Suite 300 Oak Park, Illinois 60301	NONE	PC	A one-year grant for continued support of the Make Medicare Work Coalition (MMW), helping older people in Illinois access affordable healthcare and use their benefits effectively	1/15/2020	\$65,000
AgeOptions, Inc. 1048 Lake Street, Suite 300 Oak Park, Illinois 60301	NONE	PC	A one-year grant for continued support of the Make Medicare Work Coalition (MMW), helping older people in Illinois access affordable healthcare and use their benefits effectively	7/15/2020	\$60,000
Center for Hearing and Speech 9835 Manchester Road St. Louis, Missouri 63119-1243	NONE	PC	A one-year grant to provide full-service audiology, including low-cost hearing aids in a new comprehensive health clinic serving older people.	1/15/2020	\$19,928
CJE SeniorLife 3003 W Touhy Avenue Chicago, Illinois 60645-2833	NONE	PC	A two-year grant for research to compare the impact on frailty of a high intensity walking program with a moderate intensity walking program for older residents of an assisted living community	1/15/2020	\$37,000
Columbia University in the City of New York 615 West 131 Street, 4th Floor Mail Code 4524 New York, New York 10027-7984	NONE	PC	A one-year grant to strengthen the reporting of journalists by training them on the consequences of loneliness across the life course	4/15/2021	\$65,000
Compassion & Choices 101 SW Madison Street #8009 Portland, Oregon 97207-2118	NONE	PC	A two-year grant to support advocacy work in Illinois focused on medical aid in dying	1/15/2020	\$50,000
Compassion & Choices 101 SW Madison Street #8009 Portland, Oregon 97207-2118	NONE	PC	A two-year grant to support advocacy work in Illinois focused on medical aid in dying	1/15/2021	\$50,000
Education Development Center, Inc. 43 Foundry Avenue Waltham, Massachusetts 02453	NONE	PC	An 18-month grant to develop and pilot test an online training curriculum for Emergency Medical Service providers to help them identify patients at risk for elder abuse and report appropriately to adult protective services	10/15/2020	\$62,462
Education Development Center, Inc. 43 Foundry Avenue Waltham, Massachusetts 02453	NONE	PC	An 18-month grant to develop and pilot test an online training curriculum for Emergency Medical Service providers to help them identify patients at risk for elder abuse and report appropriately to adult protective services	4/15/2020	\$70,000
Elderbridge Agency on Aging 1190 Bnarsstone Drive, Suite 33 Mason City, Iowa 50401	NONE	PC	A one-year grant to provide care transitions for older people who want to continue living in their community following a stay in a hospital or nursing home.	1/15/2020	\$50,000
Florida Health Justice Project, Inc. 3793 Irvington Avenue Miami, Florida 33133	NONE	PC	A one-year grant to increase the capacity of advocates to help older people in Miami-Dade County gain access to home- and community-based services.	1/15/2020	\$20,000
Hartford HealthCare Research Department 80 Seymour Street Hartford, Connecticut 06102	NONE	PC	A two-year grant to evaluate whether exposure to multi-sensory stimulation environments can improve clinical and cognitive outcomes in older patients at risk of delirium	7/15/2020	\$59,196
Harvard T. H. Chang School of Public Health Presidents & Fellows of Harvard College P.O. Box 415649 Boston, Massachusetts 02241-5649	NONE	PC	A two-year grant to systematically examine chronic opioid therapy use and cessation, as well as the health outcomes associated with its discontinuation in older adults	1/15/2020	\$65,262
Harvard T. H. Chang School of Public Health Presidents & Fellows of Harvard College P.O. Box 415649 Boston, Massachusetts 02241-5649	NONE	PC	A two-year grant to systematically examine chronic opioid therapy use and cessation, as well as the health outcomes associated with its discontinuation in older adults	10/15/2020	\$65,262
Harvard T. H. Chang School of Public Health Presidents & Fellows of Harvard College P.O. Box 415649 Boston, Massachusetts 02241-5649	NONE	PC	A two-year grant to systematically examine chronic opioid therapy use and cessation, as well as the health outcomes associated with its discontinuation in older adults	7/15/2021	\$65,262
Home Centered Care Institute 1900 East Golf Road, Suite 480 Schaumburg, Illinois 60173	NONE	PC	An 18-month grant to build a network of well-trained, home-based primary care providers in Florida	1/15/2021	\$70,155
Housing Options Provided for the Elderly Inc 7300 Dartmouth Avenue, Suite 100 University City, Missouri 63130	NONE	PC	A one-year grant to continue counseling older homeowners at risk of defaulting on a Home Equity Conversion Mortgage and provide technical assistance and training to additional housing counseling agencies that assist older borrowers at risk of foreclosure	7/15/2020	\$37,500
Iowa CareGivers 839 Office Park Road #332 West Des Moines, Iowa 50265	NONE	PC	An 18-month grant to ensure that older Iowans receive access to good oral healthcare by maximizing the capacity, impact, and sustainability of a state-recognized, competency-based training program for direct care workers.	4/15/2020	\$66,573
Iowa Legal Aid 1111 9th Street, Suite 230 Des Moines, Iowa 50314	NONE	PC	A one-year grant to enhance services provided through the organization's Legal Hotline and improve the delivery of legal services for older people	7/15/2020	\$32,095
Justice In Aging 1444 Eye Street, NW, Suite 1100 Washington, DC 20005	NONE	PC	A one-year grant for state and federal advocacy to protect older and disabled Americans from state Medicaid waivers that would limit access to health care.	1/15/2020	\$50,000
Justice In Aging 1444 Eye Street, NW, Suite 1100 Washington, DC 20005	NONE	PC	A one-year grant for state and federal advocacy to protect older and disabled Americans from state Medicaid waivers that would limit access to health care	7/15/2020	\$50,000
Legal Council for Health Justice 17 North State Street, Suite 900 Chicago, Illinois 60602-3569	NONE	PC	A three-year grant to continue advocacy addressing threats to Medicaid that may limit the ability of older people to receive home- and community-based services	4/15/2020	\$25,000

Recipient's Name and Address	Relationship	Foundation Status of Recipient	Purpose of Grant	Schedule Date	Amount
McGaw YMCA 1000 Grove Street Evanston, Illinois 60201	NONE	PC	A one-year grant to improve the delivery of services for older people living in an affordable housing building	3/15/2020	\$29,700
Meals On Wheels of Sheboygan County, Inc 1004 South Taylor Drive Sheboygan, Wisconsin 53081-4773	NONE	PC	A second-year grant to expand an Inter-professional, in-home program involving multi-dimension health screenings for older clients of Fresh Meals On Wheels	1/15/2020	\$33,000
Medicare Rights Center 266 West 37th Street, 3rd Floor New York, New York 10018-6609	NONE	PC	A one-year grant to continue advocacy efforts to protect and strengthen national health insurance programs for older Americans	1/15/2020	\$46,000
Medicare Rights Center 266 West 37th Street, 3rd Floor New York, New York 10018-6609	NONE	PC	A one-year grant to continue advocacy efforts to protect and strengthen national health insurance programs for older Americans	4/15/2020	\$45,500
Mercy Medical Center - Des Moines 411 Laurel Street Suite 2250 Des Moines, Iowa 50314	NONE	PC	A one-year grant to support implementation of a new community paramedicine program for individuals over age 65 suffering from congestive heart failure	7/15/2020	\$37,067
Miami University Scripps Gerontology Center 396 Upham Hall 100 Bishop Circle Oxford, Ohio 45056	NONE	PC	An 18-month grant for research to assess 1) how local tax levies that fund services for older adults directly or indirectly affect caregivers' lives, and 2) how these programs could enhance their intentional focus on and effectiveness for caregivers	6/15/2020	\$50,000
Miami University Scripps Gerontology Center 396 Upham Hall 100 Bishop Circle Oxford, Ohio 45056	NONE	PC	An 18-month grant to study the impact of Our Family, Our Way, a communication and care coordination process for caregiving families	1/15/2020	\$51,992
Miami University Scripps Gerontology Center 396 Upham Hall 100 Bishop Circle Oxford, Ohio 45056	NONE	PC	An 18-month grant to study the impact of Our Family, Our Way, a communication and care coordination process for caregiving families	1/15/2021	\$51,993
Mid-Florida Area Agency on Aging, Inc. d/b/a Elder Options 100 SW 75th Street Suite 301 Gainesville, Florida 32607	NONE	PC	A two-year grant to continue increase and sustain Healthy Aging programs	1/15/2020	\$50,000
Mid-Florida Area Agency on Aging, Inc. d/b/a Elder Options 100 SW 75th Street Suite 301 Gainesville, Florida 32607	NONE	PC	A two-year grant to continue increase, and sustain Healthy Aging programs	1/15/2021	\$41,898
National Consumer Law Center 7 Winthrop Square, 4th Floor Boston, Massachusetts 02110-1245	NONE	PC	A one-year grant to protect the rights of older adults faced with foreclosure on Home Equity Conversion Mortgages	6/15/2020	\$30,000
North West Housing Partnership 1701 E Woodfield Road, Suite 203 Schaumburg, Illinois 60173	NONE	PC	A two-year grant to pilot a health-housing strategy by implementing a CAPABLE demonstration in Chicago's northwest suburbs	1/15/2020	\$47,600
Open Communities 922 Davis Street Evanston, Illinois 60201	NONE	PC	A one-year grant to make housing counseling and outreach services more accessible to older people	7/15/2020	\$32,945
Oregon State University Office for Sponsored Research and Award Administration 312 Kerr Administration Building Corvallis, Oregon 97331-2140	NONE	PC	An 18-month grant to develop a psychometrically sound measure of the nature of intergenerational contact for the use of researchers and practitioners	3/15/2020	\$39,145
Pension Rights Center 1730 M Street, NW, Suite 1000 Washington, DC 20036-4542	NONE	PC	A one-year grant to continue advocating for a comprehensive solution to the multi-employer crisis to fix underfunded pension plans and protect retirees' hard-earned pensions	1/15/2020	\$30,000
Rush University Medical Center 1645 West Jackson Chicago, Illinois 60612	NONE	PC	A one-year grant to create support for family caregivers throughout the Rush health system by standardizing processes to identify them, assess their needs, and provide relevant services and resources	1/15/2020	\$50,000
Saint John's Community Care 222 Goethe Avenue Collinsville, Illinois 62234-3306	NONE	PC	A two-year grant to continue a pilot program for older adults with early stage dementia and their caregivers.	12/15/2020	\$25,445
Services and Advocacy for Gay, Lesbian, Bisexual and Transgender Elders 305 Seventh Avenue, 15th Floor New York, New York 10001	NONE	PC	A two-year grant to build the advocacy and media skills of LGBT older persons who will serve as effective spokespersons about the harms caused by discrimination and the need for LGBT-inclusive aging policies in Florida and Illinois	12/15/2020	\$50,000
Shriver Center on Poverty Law 67 East Madison Street, Suite 2000 Chicago, Illinois 60603-3014	NONE	PC	A one-year grant to train legal aid professionals and tenant groups to advocate for older public housing residents' rights and safety, and for affordable public housing	1/15/2020	\$30,000
The Foundation for Post-Acute and Long-Term Care Medicine 10500 Little Patuxent Parkway, Suite 210 Columbia, Maryland 21044	NONE	PC	An 18-month grant to revise clinical practice guidelines on pain, delirium, dementia, and depression and disseminate them to clinicians in post-acute and long-term care settings	4/15/2020	\$79,386
The Gerontological Society of America 1220 L Street, NW, Suite 801 Washington, DC 20005	NONE	PC	A three-year grant to increase momentum to adopt the principles of Reframing Aging, an initiative of the Leaders of Aging Organizations.	4/15/2020	\$75,000
The Gerontological Society of America 1220 L Street, NW, Suite 801 Washington, DC 20005	NONE	PC	A three-year grant to increase momentum to adopt the principles of Reframing Aging, an initiative of the Leaders of Aging Organizations	4/15/2021	\$75,000
The Research Foundation of the State University of New York P.O. Box 9 35 State Street Albany, New York 12201	NONE	PC	A two-year grant to develop an educational intervention to engage older adults in initiating conversations with their physicians about de-prescribing	4/15/2020	\$66,667

Recipient's Name and Address	Relationship	Foundation Status of Recipient	Purpose of Grant	Schedule Date	Amount
The Research Foundation of the State University of New York P O Box 9 35 State Street Albany, New York 12201	NONE	PC	A two-year grant to develop an educational intervention to engage older adults in initiating conversations with their physicians about de-prescribing	1/15/2021	\$66,666
The University of South Florida Board of Trustees Research & Innovation Office of Sponsored Research 4019 E. Fowler Avenue, Suite 100 Tampa Florida 33617-2008	NONE	PC	A two-year grant to research risks and protective factors leading to different outcomes (functional decline, long-term care placement, and death) between clients receiving services from the aging service provider network and clients on waiting lists for these services	4/15/2020	\$46,167
The University of South Florida Board of Trustees Research & Innovation Office of Sponsored Research 4019 E. Fowler Avenue, Suite 100 Tampa, Florida 33617-2008	NONE	PC	A two-year grant to research risks and protective factors leading to different outcomes (functional decline, long-term care placement, and death) between clients receiving services from the aging service provider network and clients on waiting lists for these services	1/15/2021	\$36,863
Trustees of Boston University Boston University Grants Receivables P O Box 28763 New York New York 10087-8763	NONE	PC	A one-year grant to continue addressing the behavioral health needs of older adults through competency-based workforce training for Senior Center staff in Illinois, Florida, and Wisconsin	7/15/2020	\$28,966
United Cerebral Palsy Seguin of Greater Chicago 3100 South Central Avenue Cicero, Illinois 60804-3956	NONE	PC	A three-year grant for a pilot program to provide home-based nursing services to older residents with developmental and intellectual disabilities who live in group homes.	1/15/2020	\$36,400
University of Louisville Research Foundation Sponsored Programs / Grants Administration 300 E. Market Street, Suite 200 Louisville, Kentucky 40202-1959	NONE	PC	An 18-month grant to determine which aspects of the hearing screening experience influence whether participants will use an online Decision Coaching Guide and subsequently visit an audiologist.	4/15/2020	\$56,250
University of Louisville Research Foundation Sponsored Programs / Grants Administration 300 E. Market Street, Suite 200 Louisville, Kentucky 40202-1959	NONE	PC	An 18-month grant to determine which aspects of the hearing screening experience influence whether participants will use an online Decision Coaching Guide and subsequently visit an audiologist	1/15/2021	\$56,250
University of Massachusetts Boston Office of Research and Sponsored Programs 100 Morrissey Blvd Boston, Massachusetts 02125-3393	NONE	PC	A three-year grant to build sustainability for the Elder Economic Security Standard Index, a unique, geographically-specific measure of the income required for older people to stay in their homes and remain independent.	4/15/2020	\$38,790
University of Massachusetts Boston Office of Research and Sponsored Programs 100 Morrissey Blvd Boston Massachusetts 02125-3393	NONE	PC	A three-year grant to build sustainability for the Elder Economic Security Standard Index, a unique, geographically-specific measure of the income required for older people to stay in their homes and remain independent	10/15/2020	\$28,463
University of Massachusetts Boston Office of Research and Sponsored Programs 100 Morrissey Blvd Boston, Massachusetts 02125-3393	NONE	PC	A three-year grant to build sustainability for the Elder Economic Security Standard Index, a unique, geographically-specific measure of the income required for older people to stay in their homes and remain independent	4/15/2021	\$28,463
University of Massachusetts Boston Office of Research and Sponsored Programs 100 Morrissey Blvd. Boston, Massachusetts 02125-3393	NONE	PC	A one-year grant to continue to provide expert legal counseling and advocacy for Illinois retirees who need help getting the pension benefits they have earned	4/15/2020	\$35,000
University of Wisconsin-Madison Research and Sponsored Programs 21 North Park Street, Suite 6401 Madison, Wisconsin 53715-1218	NONE	PC	A one-year grant to develop a Spanish language cultural adaptation of Stepping On, an evidence-based fall prevention program, and assess its feasibility to be delivered with fidelity to Latinx older people	10/15/2020	\$35,421
UW-Madison UW-Madison GAR Account Drawer 538 Milwaukee, Wisconsin 53278-0538	NONE	PC	A one-year grant to develop a Spanish language cultural adaptation of Stepping On, an evidence-based fall prevention program, and assess its feasibility to be delivered with fidelity to Latinx older people	1/15/2020	\$35,422
Wayne State University Office of Research and Sponsored Programs 5057 Woodward Avenue, 13th Floor Detroit, Michigan 48202-4050	NONE	PC	A two-year grant to develop real-world measures of financial management, identify risk factors for fraud and exploitation, and create a motivational interviewing module to help older people protect their finances	8/31/2020	\$96,382
Wisconsin Institute for Healthy Aging 1414 MacArthur Road, Suite B Madison, Wisconsin 53714	NONE	PC	A one-year grant to design effective referral systems to engage low-income and rural-residing older adults in evidence-based, healthy aging programs.	1/15/2020	\$39,174
Yale University Office of Sponsored Projects P O Box 1873 New Haven, Connecticut 06508-1873	NONE	PC	A two-year grant to study how highly partnered Area Agencies on Aging establish and maintain collaborative relationships with healthcare partners.	7/15/2020	\$80,000
Yale University Office of Sponsored Projects P O Box 1873 New Haven, Connecticut 06508-1873	NONE	PC	A two-year grant to study how highly partnered Area Agencies on Aging establish and maintain collaborative relationships with healthcare partners	4/15/2021	\$80,000
Grand Total					\$3,117,086

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Recipient's Name	Address	Relationship	Foundation Status of Recipient	Amount
Lincoln Park Village, Inc	2502 N Clark Street Chicago, IL 60614	NONE	PC	\$7,500 00
Umoja Student Development Corporation	910 W Van Buren #710 Chicago, Illinois 60607	NONE	PC	\$300 00
Notre Dame Academy	3535 W Sylvania Ave Toledo, Ohio 43623	NONE	PC	\$7,500 00
St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	NONE	PC	\$4,800 00
Big Shoulders Fund	212 W Van Buren Suite 900 Chicago, Illinois 60607	NONE	PC	\$600 00
St Philip The Apostle Church	1962 Old Willow Road Northfield, Illinois 60093	NONE	PC	\$9,000 00
Vocel	5317 W Chicago Ave Chicago, IL 60651	NONE	PC	\$3,750 00
Shirley Ryan Ability Lab	355 East Erie Street Chicago, IL 60611	NONE	PC	\$600 00
Global Ageing Network	2519 Connecticut Ave NW Washington, DC 20903	NONE	PC	\$1,500 00
University of Illinois Foundation	1305 West Green Street Urbana, IL 61801-2962	NONE	PC	\$600 00
Lydia Home Association	4300 W Irving Park Road Chicago, Illinois 60634	NONE	PC	\$300 00
English Springer Rescue America, Inc	1025 Rose Creek Drive Suite 620 #305 Woodstock, Georgia 30189	NONE	PC	\$150 00
St Vincent Ferrer Church	840 George Bush Blvd Delray Beach, Florida 33483	NONE	PC	\$9,000 00
St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	NONE	PC	\$4,800 00
Holy Spirit Catholic Church	1000 Lantana Road Lantana, FL 33462	NONE	PC	\$7,500 00
Diocese of Palm Beach	P O Box 109650 9995 N Military Trail Palm Beach Gardens, Florida 33410	NONE	PC	\$750 00
Regional Seminary of St Vincent de Paul	10701 S Military Trail Boynton Beach, Florida 33437	NONE	PC	\$1,200 00
Univ of Chicago-Graduate School Business	Booth Graduate School of Business 5235 S Harper Ct 4th Floor Chicago, IL 60615	NONE	PC	\$750 00
Final Options Illinois	1055 W Bryn Mawr #F212 Chicago, Illinois 60660	NONE	PC	\$300 00
Advocate Chantable Foundation	3075 Highland Parkway, #600 Downers Grove, IL 60515	NONE	PC	\$1,200 00
Bethesda Hospital Foundation	2815 S Seacrest Blvd Boynton Beach, Florida 33435	NONE	PC	\$1,200 00
Sudden Arrhythmia Death Syndrome Fnd	4527 South 2300 East, #104 Salt Lake City, Utah 84117	NONE	PC	\$150 00
Pam McCloskey Brosnihan Foundation	P O Box 3192 Boynton Beach, Florida 33424-3192	NONE	PC	\$1,500 00
Pam McCloskey Brosnihan Foundation	P O Box 3192 Boynton Beach, Florida 33424-3192	NONE	PC	\$1,500 00
University of Wisc Milwaukee Foundation	1440 E North Ave Milwaukee, WI 53202	NONE	PC	\$2,025 00
Lincoln Park Village, Inc	2502 N Clark Street Chicago, IL 60614	NONE	PC	\$3,000 00
University of Chicago	5235 S Harper Ct Suite 450 Chicago, IL 60615	NONE	PC	\$525 00
St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	NONE	PC	\$4,800 00
American Red Cross	P O Box 37295 Washington, D C 20013	NONE	PC	\$150 00
Italian American Human Relations Fnd Chgo	624 N Western Avenue Chicago, Illinois 60612	NONE	PC	\$840 00
St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	NONE	PC	\$4,800 00
Notre Dame College Prep	7655 W Dempster Street Niles, IL 60714	NONE	PC	\$3,000 00
St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	NONE	PC	\$800 00
University of Illinois Foundation	1305 West Green Street Urbana, IL 61801-2962	NONE	PC	\$750 00
Art Institute of Chicago	111 S Michigan Avenue Chicago, IL 60603	NONE	PC	\$159 00
Housing Opportunities & Maintenance	for the Elderly 1419 W Carroll Avenue, FL 2 Chicago, IL 60607-1149	NONE	PC	\$1,500 00
Stephen Siller Towers to Tunnel Fnd	2361 Hylan Boulevard Stanten Island, New York 10306	NONE	PC	\$300 00
Grace Lutheran Church and School	7300 Division Street River Forest, Illinois 60305	NONE	PC	\$100 00
Oberlin College	50 West Lorain Street Oberlin, Ohio 44074	NONE	PC	\$450 00
Alzheimer's & Related Disorder Assn	41 Penmeter Center, East Suite 550 Atlanta, Georgia 30346	NONE	PC	\$1,500 00
Loras College	1450 Alta Vista Street Dubuque, Iowa 52001	NONE	PC	\$3,150 00
Friends of the Comm Integration Services	212 S 32nd Street Belleville, Illinois 62226	NONE	PC	\$750 00
Terra Nova Films, Inc	9848 S Winchester Ave Chicago, IL 60643	NONE	PC	\$250 00
YWCA Evanston/North Shore	1215 Church Street Evanston, Illinois 60201	NONE	PC	\$225 00
Misericordia Home	6300 North Ridge Chicago, IL 60660	NONE	PC	\$600 00
Lincoln Park Village, Inc	2502 N Clark Street Chicago, IL 60614	NONE	PC	\$3,000 00
Lincoln Park Village, Inc	2502 N Clark Street Chicago, IL 60614	NONE	PC	\$750 00
Dupage Children's Museum	301 N Washington Street Naperville, Illinois 60540	NONE	PC	\$1,500 00
YWCA Evanston/North Shore	1215 Church Street Evanston, Illinois 60201	NONE	PC	\$150 00
Lincoln Park Village, Inc	2502 N Clark Street Chicago, IL 60614	NONE	PC	\$3,000 00
Miami University Foundation	926 East Chestnut Street Oxford, Ohio 45056	NONE	PC	\$2,250 00
Chicago Innovation Foundation	2001 N Halsted #201 Chicago, Illinois 60657	NONE	PC	\$3,000 00
Chicago Innovation Foundation	2001 N Halsted #201 Chicago, Illinois 60657	NONE	PC	\$2,250 00

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Recipient's Name	Address	Relationship	Foundation Status of Recipient	Amount
Chicago Innovation Foundation	2001 N Halsted #201 Chicago, Illinois 60657	NONE	PC	\$2,250 00
Lincoln Park Village, Inc	2502 N Clark Street Chicago, IL 60614	NONE	PC	\$450 00
Grace Lutheran Church	493 Forest Avenue Glen Ellyn, IL 60137	NONE	PC	\$3,000 00
Dementia Action Alliance	2342 Oak Street Falls Church, Virginia 22046	NONE	PC	\$250 00
DonorsChoose Org	134 W 37th Street, 11th Floor New York, NY 10018	NONE	PC	\$300 00
WTTW-Channel 11	5400 N St Louis Chicago, Illinois 60625	NONE	PC	\$225 00
Greater Chicago Food Depository	4100 W Ann Lurie Place Chicago, IL 60632	NONE	PC	\$250 00
United Way of Metro Chicago	231196 Momentum Place Chicago, Illinois 60689	NONE	PC	\$1,500 00
Globalgiving Foundation Inc	1110 Vermont Ave NW, #550 Washington, DC 20005	NONE	PC	\$150 00
Team Rubicon	6171 West Century Blvd , #310 Los Angeles, California 90045	NONE	PC	\$928 80
American Cancer Society, Inc	P O Box 22718 Oklahoma City, Oklahoma 73123	NONE	PC	\$300 00
San Francisco Hospital Foundation	P O Box 410836 San Francisco, CA 94141	NONE	PC	\$600 00
Alzheimer's Association	225 N Michigan, 17th Floor Chicago, Illinois 60601-7633	NONE	PC	\$180 00
Shriver Center on Poverty Law	67 East Madison, Suite 2000 Chicago, Illinois 60603	NONE	PC	\$15,000 00
Center for Law and Social Policy	1200 18th Street, NW Washington, DC 20036	NONE	PC	\$3,000 00
DAV Chantable Service Trust	3725 Alexandria Pike Cold Spring, Kentucky 41076	NONE	PC	\$150 00
Illinois Partners for Human Service	310 South Peoria, Suite 404 Chicago, Illinois 60607	NONE	PC	\$750 00
National Medical Fellowships, Inc	12 East 46th St #5-E New York, New York 10017	NONE	PC	\$6,000 00
LUNgevity Foundation	218 S Wabash #540 Chicago, Illinois 60604	NONE	PC	\$150 00
West Suburban Special Recreation Fnd	2915 Maple Street Franklin Park, Illinois 60131	NONE	PC	\$2,088 00
Shriver Center on Poverty Law	67 East Madison, Suite 2000 Chicago, Illinois 60603	NONE	PC	\$1,950 00
Thanks Mom & Dad Fund, Inc	3355 Lenox Road, #750 Atlanta, Georgia 303226	NONE	PC	\$1,500 00
Alpha and Omega Society, Inc	P O Box 311644 Atlanta, Georgia 30331	NONE	PC	\$3,000 00
Shriver Center on Poverty Law	67 East Madison, Suite 2000 Chicago, Illinois 60603	NONE	PC	\$1,500 00
Dominican University	7900 West Division Street River Forest, Illinois 60305	NONE	PC	\$750 00
DonorsChoose Org	134 W 37th Street, 11th Floor New York, NY 10018	NONE	PC	\$150 00
University of Wisc. Milwaukee Foundation	1440 E North Ave Milwaukee, WI 53202	NONE	PC	\$7,500 00
A New Thing Ministries	1683 W Carbaea Trail, #2-B Atlanta, Georgia 30316	NONE	PC	\$1,500 00
Shawnash Institute, Inc	126 S Scoville Avenue Oak Park, Illinois 60302	NONE	PC	\$750 00
American Red Cross	P O Box 37295 Washington, D C 20013	NONE	PC	\$300 00
Italian American Human Relations Fnd Chgo	624 N Western Avenue Chicago, Illinois 60612	NONE	PC	\$1,500 00
Planned Parenthood Federation	123 William Street New York, New York 10038	NONE	PC	\$150 00
PeopleCare, Inc	60 Akenside oad Riverside, Illinois 60546	NONE	PC	\$150 00
American Cancer Society, Inc	P O Box 22718 Oklahoma City, Oklahoma 73123	NONE	PC	\$150 00
Center for Black Women's Wellness	477 Windsor Street SW, #309 Atlanta, Georgia 30312	NONE	PC	\$7,500 00
Greater Chicago Food Depository	4100 W Ann Lurie Place Chicago, IL 60632	NONE	PC	\$150 00
St. Teresa of Avila Parish	1950 N Kenmore Chicago, Illinois 60614	NONE	PC	\$3,000 00
Center for Reproductive Rights	199 Water Street, 22nd Floor New York, New York 10038	NONE	PC	\$15,000 00
Gilda's Club	537 N Wells Chicago, Illinois 60654	NONE	PC	\$154 20
Medical Association of GA Foundation	1849 The Exchange SE #200 Atlanta, Georgia 30339	NONE	PC	\$3,750 00
Housing Opportunities & Maintenance	for the Elderly 1419 W Carroll Avenue, FL 2 Chicago, IL 60607-1149	NONE	PC	\$1,500 00
Meals on Wheels of Northeastern IL	1723 Simpson Street Evanston, Illinois 60201	NONE	PC	(\$150 00)
Oberlin College	50 West Lorain Street Oberlin, Ohio 44074	NONE	PC	\$300 00
Jewish National Fund	78 Randall Avenue Rockville Centre, New York 11570	NONE	PC	\$150 00
Northwest Side Housing Center	5233 W Diversey Chicago, Illinois 60639	NONE	PC	\$150 00
Meals on Wheels of Northeastern IL	1723 Simpson Street Evanston, Illinois 60201	NONE	PC	\$150 00
Meals at Home	1723 Simpson Street Evanston, Illinois 60201	NONE	PC	\$150 00
Camp Young Judaea Midwest Inc	60 Revere Drive, Suite 800 Northbrook, Illinois 60062	NONE	PC	\$150 00
Chicago Jewish Day School	3730 N California Chicago, Illinois 60618	NONE	PC	\$600 00
Chicago Public Library Foundation	20 N Michigan Ave Suite 520 Chicago, IL 60602	NONE	PC	\$600 00
Rogers Park Montessori School	1800 W Balmoral Avenue Chicago, Illinois 60640	NONE	PC	\$3,000 00
Shirley Ryan Ability Lab	355 East Erie Street Chicago, IL 60611	NONE	PC	\$600 00
Access Living of Metropolitan Chicago	115 W Chicago Avenue Chicago, IL 60654	NONE	PC	\$900 00

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ATTACHMENT C

Recipient's Name	Address	Relationship	Foundation Status of Recipient	Amount
American Occupational Therapy Found	12300 Twinbrook Parkway #520 Rockville, MD 20852	NONE	PC	\$600 00
Shnver Center on Poverty Law	67 East Madison, Suite 2000 Chicago, Illinois 60603	NONE	PC	\$150 00
Lydia Home Association	4300 W Irving Park Road Chicago, Illinois 60634	NONE	PC	\$600 00
Open Books LTD	651 West Lake Street Chicago, IL 60661	NONE	PC	\$300 00
Equip for Equality	20 N Michigan Avenue, #300 Chicago, Illinois 60602	NONE	PC	\$1,500 00
Univ of Chicago-Graduate School Business	Booth Graduate School of Business 5235 S Harper Ct 4th Floor Chicago, IL 60615	NONE	PC	\$900 00
University of Wisc Milwaukee Foundation	1440 E North Ave Milwaukee, WI 53202	NONE	PC	\$2,700 00
Total Matching Gifts				<u>\$214,800 00</u>