

Stronger. Together.



2022 ANNUAL REPORT

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“Strength and unity. Those words characterized AARP Foundation in 2022.”

2022

FROM THE PRESIDENT

communities, and recover from disasters. No matter when or how we came back, we were united in our purpose: to work even harder to achieve our vision of a country free of poverty where no older person feels vulnerable.

IN 2022, WE GREW STRONGER. TOGETHER.

With gratitude,

Claire Casey
PRESIDENT, AARP FOUNDATION

Stronger

Dear Friends,

Strength and unity. Those words characterized AARP Foundation in 2022.

As president, I've been genuinely moved by the sameness of heart that exists within this community of staff, volunteers, donors, and partners. A shared devotion to the work underpinned everything the Foundation accomplished last year.

Our staff wrapped up two years of remote work and connected in person once more. This was nothing new for the Senior Community Service Employment Program (SCSEP) team, who were back in the community mere weeks after things shut down, working with local partners and providing in-person service to older jobseekers. For everyone else, however, stepping back into our offices felt like a homecoming.

Some programs continued to build on their established success, as they'd done all along; others injected fresh ideas and energy into their offerings to increase their impact.

Our small but mighty legal advocacy team, who had spent two years pursuing their cases remotely, argued before judges in person instead of on Zoom, bringing the voice of older adults back into the nation's courtrooms.

Our remarkable volunteers rejoined their classrooms, community centers, libraries and more, never missing a beat in the transition back from remote volunteering.

And our generous donors, who unfailingly stood by us all through the pandemic, came through as they always have for the older adults who need their support.

Because of all this, we were able to fight systemic injustice and help older adults seize opportunities to re-enter the workforce, bolster their budgets, give back to their

947,572

vulnerable older adults helped

54%
increase*

\$726.1 million

secured for older adults with low income

47%
increase*

\$376 million

in tax refunds and credits

25%
increase*

*as compared to 2021

Together

2.27 million

donors who helped make our work possible

27,086

volunteers who supported AARP Foundation initiatives

More than 5,500

community-based organizations who partnered with us

Seizing Opportunities

A robust U.S. labor market resulted in more job openings than available workers, and older jobseekers were keen to seize these opportunities. BACK TO WORK 50+ collaborated with more local partners and broadened its online services. Our Senior Community Service Employment Program’s sustained success led the U.S. Department of Labor, which funds the program, to award us two new grants.¹ Not only were we able to continue administering SCSEP, but the new grants also allowed us to expand it.



45,628
older adults
served
through workforce programs
— up 11% from 2021

Although both BACK TO WORK 50+ and SCSEP build jobseekers’ skills and confidence, we also saw a need for dedicated training to meet the demands of a labor market where digital skills are no longer optional. That’s why we launched the new Digital Skills Ready@50+™ initiative, which provides digital training classes for people over 50.

\$125
million
in new
income
— up 14% from 2021

By extending the reach and impact of our workforce programs, we helped participants secure jobs and take tangible steps toward financial stability.

BACK TO WORK 50+

The BACK TO WORK 50+ program closed out its first decade with a new national online program, generating a 30% increase in overall participation by older adults with low income.



30%
increase
in participation

In addition to extending its geographic reach, the program delivered job search information and tools to 12,620 people, generating **\$16.2 million in new income.**

Of the unemployed jobseekers who participated in our coaching programs, **40% landed jobs** — and they did it, on average, just 16 weeks after starting the program. That is a significant contrast to the average of 27 weeks that most people 55 and older spend unemployed.² What’s more, they reported an average wage of \$21 an hour, which is about **twice the average national minimum wage** of \$10.67 an hour.³

Guided by trained career transition coaches who hosted workshops in person and online, BACK TO WORK 50+ participants built the skills and confidence they needed to compete for high-quality jobs and increase their income in a fast-changing job market.

\$16.2 million
in new income

40%
landed jobs

earning
twice
the average national
minimum wage



Digital Skills Ready@50+

The Digital Skills Ready@50+™ initiative was created to meet a pressing need: digital skills training for people over 50 who are living with low income so that they have the tools necessary to land good jobs that lead to long-term financial stability. The new initiative, launched in 2022, was made possible by a \$10 million grant from Google.org.

By providing training in the digital essentials, the initiative equips participants with the fundamental skills needed to navigate today’s digital world, including the labor market. It’s delivered mostly through community-based organizations (in-person, virtual, or hybrid) in collaboration with Older Adults Technology Services (OATS) from AARP, which is renowned for its curriculum tailored to older people.



During that time our community partners trained **9,737 participants** to use smartphones, Zoom, Microsoft Office, and social media for job searches as well as social connection

In less than eight months, we partnered with **110 community organizations** across eight states, including Arizona, Georgia, Illinois, Louisiana, North Carolina, Pennsylvania, South Carolina, and Texas

Senior Community Service Employment Program

For more than 50 years, AARP Foundation has administered the Senior Community Service Employment Program (SCSEP), funded primarily by the U.S. Department of Labor. SCSEP matches jobseekers over 55 with local nonprofit and public agencies so they can improve skills and build self-confidence while earning a modest training wage.



The decades of success we’ve had with SCSEP have brought the Foundation recognition as a national leader in tackling senior unemployment. And in 2022, our track record led the Department of Labor to award us two new grants that made it possible for us to expand our SCSEP service in Arkansas and North Carolina, resulting in 385 more training opportunities.

Thanks in part to this effort, the program **served 10,855 older adults and generated \$88.4 million in new income**, representing a year-on-year growth of 10% and 14%, respectively.

It’s a win-win — both for the participants, who learn new skills, and for the communities, which benefit from more than 6 million hours’ worth of community service.

Today we run **105 SCSEP offices** in 19 states and Puerto Rico, harnessing the collective strength of **3,500 nonprofit** and government host agencies



“I was in a dark place, but SCSEP helped save me.”

—Loretta Boyd, SCSEP participant

Bolstering Budgets

In 2022, record-high inflation sent prices soaring on necessities like food, fuel, and rent, disproportionately affecting older people with low income. The federal and state governments responded by extending policies and emergency programs to provide extra help, but older adults faced the same barriers that existed before the pandemic: stigma, misconceptions about eligibility, and cumbersome application processes, to name just a few. As a result, participation rates lagged.



\$601 million
in benefits, tax
refunds, and credits for
vulnerable older adults
54% increase*
*as compared to 2021

AARP Foundation ramped up our efforts to help older adults gain access to public benefits, tax refunds, and credits that would help them bolster their budgets. We ran awareness campaigns to fight stigma and misinformation surrounding the Supplemental Nutrition Assistance Program (SNAP) and Medicare Savings Programs (MSP), and we enhanced our technology and service models to reach more people.

Benefits

57,496
older adults served

146% increase*

\$124,340,066
in benefits received

140% increase*

*as compared to 2021

Tax refunds and credits

1,450,273
older adults served

38% increase*

*as compared to 2021

\$476,729,718
in refunds and credits received

43% increase*

*as compared to 2021

Access to Benefits

FOOD SECURITY

Having enough money to afford nourishing food gives older adults a much better chance of avoiding serious health issues. And yet, according to recent data from the USDA, only 47% of eligible older adults are enrolled in the Supplemental Nutrition Assistance Program (SNAP) as compared to 78% of all people who are eligible.⁴ Research shows that the complicated application process discourages many older adults from applying for SNAP benefits.⁵

AARP Foundation circumvents that problem by funding community-based organizations that reach out to people over 50 who are eligible for the program and help them apply. On average, older adults in the communities we serve receive about \$153 a month. That's enough to cover a month's worth of nutritious groceries, including eggs, dairy products, fruit, and vegetables.

In 2022, we helped 48,906 eligible older adults secure SNAP benefits — more than double the number we helped in 2021. All told, these applicants received \$94.4 million in benefits. We also extended grants into 2023 for 14 organizations in states that have the Elderly Simplified Application Project (ESAP) in place, which streamlines the application process for older adults with low income and eases the burdens of reapplying.

Finally, we joined AARP last year at the White House Conference on Hunger, Nutrition, and Health, the first since the inaugural conference was held in 1969. AARP and AARP Foundation together made a commitment to research older adults' access to SNAP, which we will use to improve enrollment rates.



\$153 a month

for an older adult, enough to cover a month's worth of groceries

\$94.4 million

in SNAP benefits secured for 48,906 eligible older adults

“

What we do is so beyond benefits.

—Stephanie McGuire of SC Thrive, an AARP Foundation grantee that helps people apply for SNAP benefits



HEALTH CARE

According to AARP's Public Policy Institute, 1 in 10 traditional Medicare beneficiaries spent more than half of their income on health care in 2019.⁶ This type of cost burden can lead some to not seek the medical care they need.



In 2022, AARP Foundation funded community-based organizations that help older adults lower their costs by enrolling in Medicare Savings Programs (MSP) and the Part D Low-Income Subsidy (LIS) program (also known as Extra Help). MSP is a government subsidy program that aims to make Medicare more affordable for beneficiaries with low income by helping to pay premiums, deductibles, coinsurance, and copayments — and yet barely half of those eligible for MSP were enrolled in 2019.⁷ Similarly, just 60% of eligible older adults were enrolled that year in Extra Help, a federal subsidy program that pays for Medicare Part D prescription drug coverage.

We helped 3,528 eligible older adults enroll in health care benefits, saving them

\$3,373 a year

per beneficiary (about half the total annual health care costs of the average U.S. adult over 50⁸) for a **total savings of**

\$11.8 million



Assistance With Tax Refunds and Credits

Our free tax preparation services reached 25% more older adults across the country, helping them secure substantial refunds, save significantly on tax preparation costs, and take advantage of 2022's expanded eligibility for the Earned Income Tax Credit (EITC).

\$374.4 million

in tax refunds and credits for 693,160 older adults with low income.

155,453 people got an additional

\$100.6 million

from the Earned Income Tax Credit.



Per person, that is an average **savings of \$271** in tax preparation and e-filing costs, an average of **\$540 in refunds**, and an average of **\$647 from the EITC**.

ALTOGETHER, THAT AMOUNT COULD COVER A PERSON'S ANNUAL EXPENSES FOR GAS AND UTILITIES.⁹

TAX-AIDE

Tax-Aide provides free in-person and virtual tax preparation help to anyone, with a focus on taxpayers who are over 50 and have low to moderate income. In 2022, we renewed our focus on volunteer recruitment, tested a variety of service delivery models, and launched a successful Tax-Aide chatbot to help people make appointments online, identify Tax-Aide sites, and connect with tax specialists when needed.



PROPERTY TAX-AIDE

Launched in 2019, Property Tax-Aide helps older homeowners and renters with low to moderate income take advantage of property tax refund and credit programs where available.

More than 20 million people over the age of 50 spend upward of 30% of their income on housing — and half of those spend at least 50%.¹⁰ Seniors living on low or fixed incomes are at risk of having to leave their homes because they can no longer afford rising property taxes or increased rent. With Property Tax-Aide's assistance, older adults can lower their housing costs and increase their ability to stay in their homes longer.

In 2022, Property Tax-Aide recruited new volunteers and started its first volunteer-led programming in Washington, D.C., and North Carolina.

We helped
6,735
taxpayers with low
income secure
\$1.67
million

Driving Long-Term Change

At AARP Foundation, we've long understood that there is no one path to ending senior poverty. Although last year we prioritized the immediate needs of older adults who struggled with the fallout from the pandemic, we also had our eyes on the future. We made a strategic shift in our intergenerational tutoring program to position it for long-term growth. And our legal advocacy team continued to fight for the rights of older adults, especially those without the resources to meet their basic needs, by winning important legal victories that help to pave the way for systemic change.



This allowed us to engage more tutors and students than we could during the pandemic, when schools were closed and tutors worked remotely with one student at a time. In addition, we shifted to a model that will enable us to deliver the program at a lower cost through partner organizations that are already embedded in their communities.

1,051
active tutors

49%
increase*

3,280
students served

52%
increase*

*as compared to 2021

Participating students showed improved social-emotional learning skills across several categories, including overall engagement — the crucial “soft skills” that set children up for academic success, fulfilling careers, healthy relationships, and responsible civic engagement throughout their lives.



Experience Corps

Experience Corps, our intergenerational tutoring program, gives older adults the opportunity to connect with their communities and to guide young students toward a life of economic stability through education. Though the program maintained a virtual option in 2022, making it possible to reach many more children in underserved communities, we also returned to in-person tutoring.

“It’s amazing to see students when the light bulb goes on.”

—Sharon Justis, Experience Corps tutor



Legal Advocacy

AARP Foundation attorneys litigate at the intersection of aging and social justice. In 2022, they defended older adults from a range of abuses and rights violations, taking major steps toward our ongoing goal to bring about systemic change for the benefit of older adults.



A WIN FOR PRIVACY

Several Yale University employees represented by AARP Foundation and other attorneys reached a settlement with the university in a case charging that Yale had unlawfully penalized employees who chose not to sign up for its wellness program. Participating in the program would have forced them to submit to extensive medical testing and reveal private health information, but employees who opted out were automatically charged \$25 a week.

The settlement included a
\$1.29 million
 payment to cover employees' attorney fees and other costs

The case was consequential because recent data indicates that some 48 million employees of large firms put their privacy at risk by participating in company wellness programs — whether voluntarily or by company mandate — because participation requires them to reveal personal medical information, often to a third-party vendor administering the program.¹¹ The settlement included Yale's agreement to no longer charge an opt-out fee for a specified number of years and a payment of \$1.29 million to cover employees' attorney fees and other costs.

PROTECTING PENSIONS

It's estimated that about 1 million people with pensions from religious organizations have no federal protection.¹² About 5,000 African Methodist Episcopal (AME) Church employees and retirees were stunned to discover that they were among them.

AARP Foundation attorneys joined a class action lawsuit on behalf of the employees and retirees, alleging that AME leadership and its retirement services department mishandled and lost nearly \$90 million in retirement funds and violated the Employee Retirement Income Security Act (ERISA), which offers federal insurance to protect against the loss of funds. The lawsuit further charged that AME breached its contractual and fiduciary duties by not honoring a promised pension plan for pastors, elders, bishops, and other employees of affiliated colleges and seminaries. Court action is expected later in 2023.

We joined the class action lawsuit on behalf of
employees & retirees
 who lost nearly
\$90 million
 in retirement funds



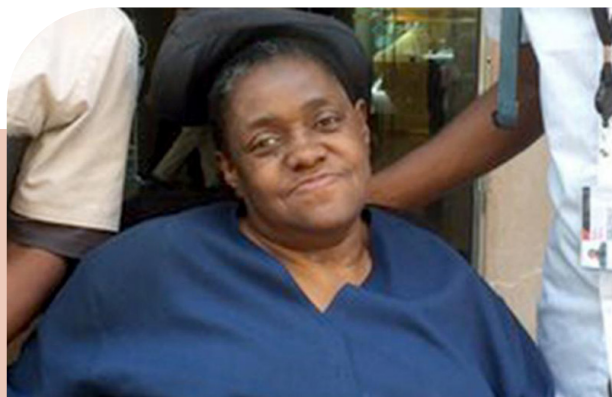


We filed a class action suit
against one of the largest nursing facility chains
 for older adults in Illinois

CONFRONTING NURSING FACILITY UNDERSTAFFING

More than 8 in 10 nursing facilities in the U.S. are experiencing staffing shortages¹³ — a longtime problem that grew worse during the pandemic. At one chain of nursing facilities, however, residents believed the understaffing was intentional.

Represented by AARP Foundation attorneys and others, residents of six facilities in Illinois filed a class action suit against the Alden Group, one of the largest nursing facility chains for older adults in the state. The complaint alleges that Alden systematically understaffs its facilities, leading to dangerous and often grossly unsanitary living conditions for the residents. According to the complaint, Alden saves millions of dollars each year by refusing to hire sufficient staff to comply with legal staffing requirements and intentionally hiding it from regulators. The suit drew major press coverage, raising awareness of a widespread practice that jeopardizes the health and well-being of nursing facility residents.



Vietress Bacon ended up in a nursing facility and couldn't get out — until AARP Foundation helped.



Employee Shawn Jones knew his company forcing him to participate in a wellness program was wrong — so he did something about it.

Recovering From Disaster

In the fall of 2022, hurricanes delivered devastating blows to Florida and Puerto Rico. Hurricane Ian was one of the deadliest and costliest storms in U.S. history, leaving many older Floridians to grapple with devastating losses and harsh economic conditions. In Puerto Rico, Hurricane Fiona caused widespread and weeks-long power outages, destroyed bridges and roadways, and left entire communities under water.



AARP Foundation donors came through in a big way. Thanks to their generous support, and matching funds from AARP and AARP Foundation, we distributed \$1.1 million in emergency grants to help older adults who lost their homes and their belongings. Through the work of our grantees (listed below), those who were affected are repairing their homes, getting legal assistance, and receiving financial support.

- Senior Friendship Centers (Florida)
- Lee County Legal Aid Society (Florida)
- Legal Aid Service of Collier County (Florida)
- St. Bernard Project (Florida and Puerto Rico)
- Ponce Neighborhood Housing (Puerto Rico)
- Fundación Acceso a la Justicia (Puerto Rico)

\$1.1 million
 in emergency grants distributed to help those who lost their homes and belongings



Thank You to Our Donors, Partners, Volunteers, Staff, Board, and Program Participants

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

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Google.org	Software People Inc.
Government of the District of Columbia	State of Washington
The Hartford	Steans Family Foundation
Internal Revenue Service	Texas Workforce Commission
Iowa Department of Administrative Services	Tides Foundation
John A. Hartford Foundation	UnitedHealthcare, Inc.
Lenfest Foundation	United States Department of Justice
Missouri State Government	United States Department of Labor
National Association of Retired Sears Employees	

Opportunity Builders

The AARP Foundation Opportunity Builders are generous and committed leaders to our vision and mission. These donors power the work we do with their annual gifts of \$1,000 or more.

These philanthropic gifts from our donors allow us to resource our ambition to serve as a force for change on the most serious issues faced by vulnerable seniors living in poverty. We thank the following individuals for their generosity and support of AARP Foundation.

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These exceptional gifts perpetuate the legacy of caring established by AARP's founder, Dr. Ethel Percy Andrus, and allow us to serve as a force for change on the most serious issues faced by vulnerable seniors living in poverty.

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This summary of financial information has been extracted from the AARP Foundation audited financial statements for the years ending December 31, 2022, and December 31, 2021, and on which an independent public accounting firm expressed an unmodified opinion.

STATEMENTS OF FINANCIAL POSITION

AS OF DECEMBER 31, 2022, AND DECEMBER 31, 2021 (IN THOUSANDS)

ASSETS	2022	2021
Cash and cash equivalents	9,563	12,118
Contributions receivable, net	413	353
Grants receivable	12,810	10,328
Prepaid expenses and other assets	1,258	1,017
Investments	618,527	656,865
Charitable gift annuity investments	4,805	5,928
Program-related investments, net	4,825	5,113
Property and equipment, net	10,452	12,009
Total Assets	662,653	703,731
LIABILITIES		
Accounts payable and accrued expenses	25,987	25,467
Due to affiliates	6,062	1,879
Charitable gift annuities payable	3,185	3,319
Bonds payable	25,000	25,000
Total Liabilities	60,234	55,665
NET ASSETS		
Net assets without donor restrictions:		
Undesignated	57,135	58,720
Board-designated quasi-endowment	27,570	28,070
Board-designated operating reserves	62,407	64,256
Total net assets without donor restrictions:	147,112	151,046
Net assets with donor restrictions	455,307	497,020
Total Net Assets	602,419	648,066
Total Liabilities and Net Assets	662,653	703,731

STATEMENTS OF ACTIVITIES

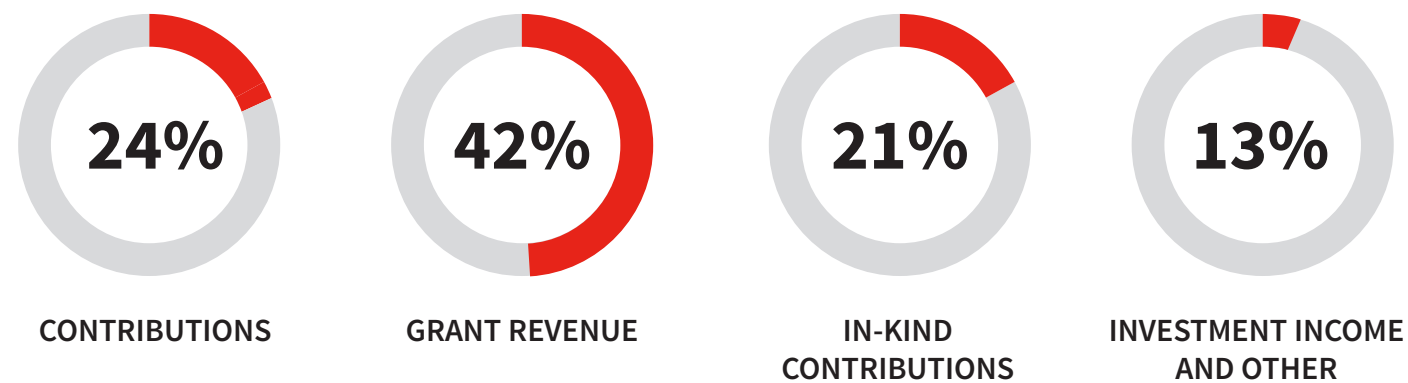
FOR THE YEARS ENDED DECEMBER 31, 2022, AND DECEMBER 31, 2021 (IN THOUSANDS)

OPERATING REVENUE	2022	2021
Grant revenue	108,172	95,294
Contributions	61,710	65,833
In-kind contributions	54,346	49,158
Investment income designated for operations	25,835	22,027
Other	6,840	2,065
Total Operating Revenue	256,903	234,377
EXPENSES		
Program Services:		
Workforce Programs	124,700	107,760
Tax and Credits Programs	20,103	16,430
Experience Corps	9,749	11,631
Impact areas and other programs	31,798	32,029
Legal Advocacy	6,363	6,608
Total Program Services	192,713	174,458
Supporting Services		
Fundraising	27,479	28,328
Management and general	23,868	22,366
Total Supporting Services	51,347	50,694
Total Expenses	244,060	225,152
Changes in Net Assets From Operations	12,843	9,225
OTHER CHANGES IN NET ASSETS		
Investments (loss) return in excess of amounts designated for operations	(58,264)	57,137
Changes in value of charitable gift annuities	(226)	(188)
Change in Net Assets	(45,647)	66,174
Net Assets, Beginning of Year	648,066	581,892
Net Assets, End of Year	602,419	648,066

SOURCES AND USES OF FUNDS

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

Revenue by Category



Functional Expenses



CITATIONS

1 AARP Foundation SCSEP is funded by a \$46,889,529 grant from the U.S. Department of Labor. This funding provides 90% of the support for SCSEP, with AARP Foundation matching 10%.

2 Schramm, J. (2023). (rep.). Employment Data Digest (table 2). AARP Public Policy Institute. Retrieved July 19, 2023, from <https://www.aarp.org/content/dam/aarp/ppi/topics/work-finances-retirement/employers-workforce/june-2023-employment-digest.pdf>. coredownload.pdf.

3 Statista Research Department. (2023, January 10). Minimum wage by state U.S. 2023. Statista. <https://www.statista.com/statistics/238997/minimum-wage-by-us-state/> [Internal analysis of dataset.]

4 Vigil, A. (2022). Trends in Supplemental Nutrition Assistance Program Participation Rates: Fiscal Year 2016 to Fiscal Year 2020. U.S. Department of Agriculture, Food and Nutrition Service, Office of Policy Support. Retrieved July 19, 2023, from <https://www.fns.usda.gov/research-and-analysis>.

5 Lampkin, C. (2022). (rep.). Food Security Focus: Experiences with the SNAP program — AARP Survey of Adults Ages 50 and Older regarding SNAP (pp. 3–4). Washington, DC: AARP Research. Retrieved July 19, 2023, from <https://doi.org/10.26419/res.00569.002>.

6 Noel-Miller, C. (2023). Beneficiaries in Traditional Medicare: Out-of-Pocket Spending for Health Care (p. 6). AARP Public Policy Institute. Retrieved July 19, 2023, from <https://doi.org/10.26419/ppi.00184.001>.

7 National Council on Aging. (2022, September 3). Take-Up Rates in Medicare Savings Programs and the Part D Low-Income Subsidy (issue brief). Retrieved July 19, 2023, from <https://ncoa.org/article/take-up-rates-in-medicare-savings-programs-and-the-part-d-low-income-subsidy>.

8 Bureau of Labor Statistics, U.S. Census Bureau (2022). Consumer Expenditure Survey (CES) Public Use Microdata Sample (PUMS), 2021 [Data set]. Bureau of Labor Statistics. Retrieved February 5, 2023, from <https://www.bls.gov/cex/pumd.htm>.

9 Bureau of Labor Statistics, U.S. Census Bureau (2022). Consumer Expenditure Survey (CES) Public Use Microdata Sample (PUMS), 2021 [Data set]. Bureau of Labor Statistics. Retrieved February 5, 2023, from <https://www.bls.gov/cex/pumd.htm>.

10 Joint Center for Housing Studies of Harvard University. (2019, October 9). Housing America's Older Adults 2019. https://www.jchs.harvard.edu/sites/default/files/reports/files/Harvard_JCHS_Housing_Americas_Older_Adults_2019.pdf.

11 Pollitz, K., Rae, M. (2020, June 9). Trends in Workplace Wellness Programs and Evolving Federal Standards. KFF. <https://www.kff.org/private-insurance/issue-brief/trends-in-workplace-wellness-programs-and-evolving-federal-standards/>.

12 Arnold, C. (2019, October 3). “Why Is There Nothing Left?’ Pension Funds Failing at Catholic Hospitals.” Morning Edition broadcast. NPR. Retrieved July 19, 2023, from <https://www.npr.org/2019/10/03/763512852/why-is-there-nothing-left-pension-funds-failing-at-catholic-hospitals>.

13 American Health Care Association. (2023). State of the Nursing Home Industry: Survey of 524 nursing home providers highlights persistent staffing and economic crisis. Retrieved July 19, 2023, from <https://www.ahcanal.org/News-and-Communications/Fact-Sheets/FactSheets/SNF-Survey-December-2022.pdf>.

**Stronger.
Together.**



About AARP Foundation

AARP Foundation works to end senior poverty by helping vulnerable people over 50 build economic opportunity. Our approach emphasizes equitable outcomes for populations that have faced systemic discrimination. As AARP's charitable affiliate, we serve AARP members and nonmembers alike. Through vigorous legal advocacy and evidence-based solutions, and by building supportive community connections, we foster resilience, advance equity and restore hope. To learn more, visit aarpfoundation.org or follow @AARPFoundation on social media.

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