Our four interrelated priorities—
all supported by vigorous legal advocacy—focus on ways struggling Americans 50+ can regain a foothold, recover their confidence and get back on track.

“We made no little plans,
for in little plans lies no magic to stir one’s blood.
We made big plans.
We aimed high in hope and work.”

Ethel Percy Andrus
AARP Founder
Dear Colleagues and Friends,

For too many Americans 50+, uncertainty is the new normal. Critical to the lives of so many others, they face choices and pressures unlike those of any other age group. As a nation, we literally can’t afford to let this situation stand.

AARP Foundation launched a strategic planning process in early 2010 to find long-term, sustainable solutions to the often interrelated problems that struggling Americans 50+ face today. The Foundation’s Board of Directors reviewed and approved research findings that identified the two top priorities for AARP Foundation:

» Helping struggling Americans 50+ meet their basic needs, and
» Highlighting the problems of poverty and aging in the U.S., many of which are hidden from public view.

To achieve this vision and ensure that we serve as many Americans 50+ in need as possible, we narrowed our focus to four key, interrelated priorities where action and legal advocacy can have the greatest impact:

» Tackling hunger proactively
» Paving the way to stable income
» Improving access to housing that’s safe and affordable
» Reconnecting those in isolation to families and communities

The strategic plan outlines how we are moving forward. AARP Foundation has already reorganized our staff to reflect the four focus areas and streamlined our operations to achieve even more efficiency and effectiveness. We have updated our program assessments and evaluation metrics to provide increasing operational transparency to our donors and potential donors—changes that have already helped us substantially increase the number of Foundation donors.

By 2030, one in every five Americans will be age 65 or older. Let’s not wait until poverty becomes a way of life they can never escape. The AARP Foundation Strategic Plan is our vision of success, and we are sharing it as widely as possible. Because ultimately, our long-term growth and sustainability is not only up to us—we need the continued support of all those who have a stake in our success. Working together, we can help those 50+ and their families win back opportunity.

Thank you.

Jo Ann Jenkins
Foundation President
An American Commitment

During the Great Depression, poverty rates among America’s seniors reached as high as 50 percent. With no safety net except the charity of local communities and extended families, being poor in America became a desperate condition symbolized by long lines at soup kitchens.

By the mid-1930s, as a nation, we committed ourselves to a better America. The national Social Security Act became law on August 14, 1935, forming the foundation of a new safety net that ultimately moved millions of older Americans out of poverty.

Today, that safety net is in shreds. Those between 50 and 59 are particularly hard hit: they face the longest spells of joblessness of any age group, and are often ineligible for assistance programs that are age-specific or designed for families with young children. The crisis will only grow unless the citizens of this nation renew our commitment to those who are 50 and older and struggling. The more we do now, the less we’ll have to do later.

Americans 50+ in Crisis

America has always been known as the land of opportunity. But for an alarming number of Americans 50 and older, any opportunity feels distant, if not unattainable. All across our great country millions of Americans 50+ who have worked hard and contributed to their families and communities are facing their later years in crisis. A lost job, a health problem or an ill spouse or partner can quickly lead to catastrophic circumstances on many fronts.

- Over 20 million low-income people age 50+ do not have adequate financial resources to meet their basic needs.
- Nearly 9 million people 50+ are at risk of daily hunger—a staggering 79 percent increase in just 10 years.
- At least 13 million 50+ households struggle with unaffordable and/or inadequate housing.
- And isolation puts millions of Americans 50+ at risk of poor health and profound loneliness.

Now is our time to set things right and build a country where people can move from vulnerability to stability and take control of their lives again. AARP Foundation is leading the charge with bold, innovative and sustainable solutions to make sure opportunity is still within reach—for everyone.

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1. Tackle Hunger Proactively

“I used to enjoy having my friends over for lunch, but I can’t do it anymore. Food costs keep going up, and it’s hard enough to feed myself.”

We set our vision: A country free of poverty where no older person feels vulnerable.

We crafted our mission: AARP Foundation is dedicated to serving vulnerable people 50+ by creating solutions that help them secure the essentials.

We developed a plan: To move millions of struggling Americans 50+ out of poverty. This is no little plan.

Developed through an intensive 18-month planning process, this strategic plan is anything but business-as-usual. Our process included extensive conversations with internal and external stakeholders, more than a dozen ideation sessions with leaders in senior services, original third-party research, a benchmarking study of 50 leading nonprofits and more. The strategic planning process also included an assessment of AARP Foundation’s competitive landscape that has aided in the development of a best-in-class profile, informing longer-term goals and a real-world business model against which we will measure performance and growth.

AARP— an extraordinary brand with an unrivaled legacy of service to Americans 50 and older. Rather than duplicate the efforts of existing organizations, AARP Foundation will innovate, enhance and extend. Working side by side with partners in communities across America, we can have a powerful multiplier effect, reaching more people who are 50 and older and helping resources go further. With this clear sense of purpose, no other organization in America can match the Foundation in its potential to implement solutions on a scale that equals the scope of this crisis.

From this work emerged a clear role for AARP Foundation, one which builds on our distinct competencies, unparalleled reach and affiliation with AARP— an extraordinary brand with an unrivaled legacy of service to Americans 50 and older. Rather than duplicate the efforts of existing organizations, AARP Foundation will innovate, enhance and extend. Working side by side with partners in communities across America, we can have a powerful multiplier effect, reaching more people who are 50 and older and helping resources go further. With this clear sense of purpose, no other organization in America can match the Foundation in its potential to implement solutions on a scale that equals the scope of this crisis.

Those struggling need a voice and advocate now more than ever. We’re ready.

Drive to End Hunger is AARP Foundation’s multipronged assault on the problem of hunger among those 50 and older. Our goal is to feed those who are hungry now, while also developing long-term, sustainable solutions to the root causes of hunger among Americans 50+.

Since hunger among this population is often hidden in the shadows, our plan includes a national awareness campaign to shine a spotlight on the problem. We’re working with four-time NASCAR Cup Series Champion Jeff Gordon, celebrities like Rachael Ray, retailers like Walgreens and media outlets around the country to break the silence about hunger among those 50 and older.

We recognize, however, that we cannot solve this problem with food alone. We must also identify and scale up innovative programs that are addressing the root causes of hunger among Americans 50+. AARP Foundation’s End Hunger Innovation Grants provide funds ranging from $50,000 to $300,000 to local, state and national organizations that are changing the landscape of hunger relief in America.

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2. Pave the Way to Stable Income

“The hardest thing I’ve ever had to do was tell my daughter we could no longer pay for college. But it came down to her tuition or the mortgage on our family home.”

At AARP Foundation, our number one goal is simple: to solve the unemployment crisis and stabilize incomes for struggling Americans 50+.

We will leverage our marketing, technological and leadership capabilities to develop a digital tool that will help organizations on the frontlines of poverty make employment opportunities and urgently needed income supports more accessible.

In addition, we will help low-income Americans 50+ better manage the income they do have by providing services and training tailored to their needs.

For those who are cut off from traditional banking solutions, we are offering the first-ever AARP Foundation Prepaid Debit Card. This low-cost banking alternative has built-in financial protections and will help drive change in the financial services market for those 50+ in need.

Our plan also includes an innovative financial training program. Many older, low-income individuals lack the tools and information to manage their money effectively, and their limited incomes can quickly spiral into debilitating poverty. Our financial training program will meet struggling Americans 50+ where they are and help create a pathway to financial security.

Longstanding and highly successful existing AARP Foundation programs like Tax-Aide, Senior Community Service Employment Program (SCSEP) and Women’s Scholarships continue to deliver assistance far above expectations and will remain core services.

3. Improve Access to Safe and Affordable Housing

“My house is paid for, but it’s still a challenge to keep up with heating and repair costs on my income. The roof is leaking in the bedroom, and there’s just no money to get it fixed.”

By 2030, one in every five Americans will be over 65 and our nation will face a severe shortage in appropriate housing to meet their needs. As people age, they need affordable housing that is structurally and mechanically safe and that accommodates people with disabilities. But their needs go beyond the house itself: they also deserve safe communities, with adequate transportation options and access to grocery stores, doctors and opportunities for connection to others.

AARP Foundation is developing strategies and solutions to address the senior housing crisis and make all of our communities affordable and appropriate for people regardless of age or physical ability. Working with partners in the public and private sectors, we are developing tools and services to help struggling Americans 50+ remain in their homes.
4. Reconnect Those in Isolation

“Sometimes I turn on the TV just to hear another human voice. But honestly, I don’t care for much of what they have on TV these days. I just get so lonely.”

When someone can’t drive anymore, or has a hard-to-manage chronic illness, or loses a job, or has to care for a parent or partner with Alzheimer’s, it’s easy to feel homebound, disconnected, overwhelmed and stranded. In one word: isolated.

At this time, there is little comprehensive data on people 50+ struggling with isolation, but indications point to a very big problem. Our immediate goal is to bring a research lens to this little-understood, national epidemic. AARP Foundation will become the first national organization to commission in-depth and specific research to better define the scope of the isolation problem among those 50 and older.

Informed by the research, the Foundation will take a holistic approach to solving isolation by looking at all the ways we can strengthen or repair the connections that make up an individual’s life experience. Our work on isolation will focus particularly on the needs of caregivers, the disabled, surviving spouses and other at-risk groups. We will collaborate with technology partners to offer state-of-the-art tools to connect homebound seniors to the outside world. And we will partner with local communities and others to link isolated people over the age of 50 to existing activities and services.

Litigation: A Powerful Tool in Our Arsenal

Age discrimination is, sadly, all too common in health care, the media, the workplace and the marketplace. Each year, thousands of Americans 50+ turn to AARP for assistance because their rights have been violated. Drawing on more than five decades of experience, our litigation team advocates in courts nationwide for the rights of Americans 50+, addressing diverse legal issues and ensuring that they have a voice in the laws and policies that affect their daily lives.

By demanding fair treatment under the law, our litigation team helps further the goals of each of our four strategic focus areas.
“With a significant portion of the 50+ population living in poverty, and the coming surge in the size of that population, we need to think long term. How do we help those 50+ protect their jobs, their financial status, now? And then, how do we help them achieve overall security for the long haul?”

Jo Ann Jenkins,
President

AARP Foundation’s Strategic Plan

**Goal:** Help Struggling Americans 50+ Meet Their Basic Needs

<table>
<thead>
<tr>
<th>Plan of Action</th>
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<tbody>
<tr>
<td>Research to understand the problem</td>
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<tr>
<td>Rapidly deploy solutions to alleviate suffering</td>
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<tr>
<td>Increase fundraising capacity</td>
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<tr>
<td>Grow our reputation for success</td>
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<tr>
<td>Evaluate to learn what works</td>
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<tr>
<td>Scale up to reach more Americans 50+ in need</td>
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| Nationally deploy successful solutions |
| Be a driving force in alleviating senior poverty |
| Grow public and private revenues |
| Stabilize millions of struggling Americans 50+ |

AARP Foundation’s Guiding Principles

- Provide effective stewardship of resources entrusted to us
- Maintain the highest ethical standards with integrity, openness and accountability
- Work in partnership with AARP and with other organizations
- Integrate with and support AARP state offices
- Use and protect our 501(c)(3) status to maximize our unique contribution
- Leverage our capacity and resources for maximum impact
- Continuously assess our strategic and operational effectiveness
AARP Foundation: the Capacity to Transform

By staying focused on our priorities and taking immediate action, we can turn the tide for millions of people.

Americans 50+ face choices and pressures unlike those of any other age group—choices few could have prepared for. Those struggling need a voice and an advocate now more than ever. As the charitable affiliate of AARP, AARP Foundation has an unrivaled capacity to be a force for change on the most serious issues facing those 50 and older today.

Over the next three years, we will transform the landscape for Americans 50+ by leveraging the trust engendered by AARP—an organization backed by more than 39 million members—as well as our enterprise-wide capabilities. We are setting ourselves up for success with the following building blocks:

A Start-Up Mentality
Our philosophy will be think bigger, go bolder or go home. Our culture will be entrepreneurial in nature and will not only encourage creativity, but cultivate it. We will set large, landscape-changing goals and back them up with innovative ideas and solid infrastructure. We will adhere to strict financial disciplines across all activities.

The Best and Brightest Talent
Our capacity to conceive, build and launch game-changing solutions will require a significant pool of talent, knowledge and expertise. We will demand professional advancement internally and recruit additional talent to strengthen our existing skills. We will outsource tasks when appropriate, choosing only partners with outstanding reputations for success.

Cutting-Edge Technology
AARP Foundation will take advantage of constantly evolving new technologies through strategic partnerships with technology industry leaders and a steady investment in systems and processes.

Increased Fundraising Capacity
Our powerful and effective solutions will be the engine for revenue growth across the institution. We will seek continued and upgraded investments from current supporters, recruit new major and transformational gift donors, expand cause marketing efforts, and increase private and public grant support. In addition, we will partner with AARP to develop new financing models that can devote more resources to our shared charitable goals.

AARP Foundation will aim to increase the number of people served each year from 3 million in 2012 to 5.5 million in 2020 by securing one or more of their basic needs through our programmatic and legal advocacy work.

To measure our progress against this goal, AARP Foundation will:

Look deeply at the impact of our programs
- Implement a robust Foundation-wide program evaluation framework in order to measure the impact and effectiveness of all programs
- Leverage best practices and new thinking to improve the impact and efficiency of our work

Be on the frontlines of social impact measurement
- Pilot the use of social return on investment (SROI) as a unifying measure of impact across the Foundation

Move the needle
- To facilitate long-term tracking of Foundation results, AARP Foundation will establish baseline national indicators of vulnerability as they relate to hunger, housing, income and isolation
- Over time, the Foundation will measure its success against the single outcome that matters—moving millions of Americans 50+ from vulnerability to stability

GROWTH NET FUNDRAISING REVENUES 2012–2014

<table>
<thead>
<tr>
<th>Year</th>
<th>Revenue (in millions)</th>
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<tbody>
<tr>
<td>2012</td>
<td>$25</td>
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<tr>
<td>2014</td>
<td>$46</td>
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2012  2014
This is *Our Defining Moment*

Nothing has the power to change the world like a generational wave of people sharing a fate. We know that any one of us could become the people we want to help—all it takes is another downturn in the markets, another business going under, an accident or illness.

Our numbers are formidable. The momentum we provide can produce lasting results.

Yes, we face big challenges. But they are not bigger than us. Together, we can make a difference.