Mission
To improve the lives of older Americans

Core Values
- Social and economic justice
- Respect and caring for all
- Innovation
- Excellence and integrity

Core Competencies

**ADVOCACY**
- Being a national voice and an advocate

**INNOVATION**
- Fostering and diffusing innovations
- Developing and deploying interactive decision-support systems

**COLLABORATIVE LEADERSHIP**
- Creating and leading strategic alliances and partnerships
- Organizing and mobilizing a nationwide network of organizations and leaders

Impact Areas

**FOR ALL OLDER ADULTS**
- Improved health and reduced disability
- Increased participation in meaningful work and volunteer activities

**FOR OLDER ADULTS WITH LIMITED MEANS**
- Increased access to benefits and resources

**FOR FRAIL AND “AT-RISK” OLDER ADULTS**
- Enhanced ability to live in communities with dignity, choice, and financial security

Who We Are
Founded in 1950, the National Council on Aging (NCOA) is a nonprofit organization with a national network of more than 14,000 organizations and leaders. Our members include senior centers, area agencies on aging, adult day service centers, faith-based service organizations, senior housing facilities, employment services, consumer groups, and leaders from academia, business, and labor.
A burning passion to make life better for millions of older Americans…that is what brings together all of the people and organizations that belong to and partner with the National Council on Aging (NCOA).

We are very proud of the many ways that NCOA and its partners are helping older people to be healthy, independent, financially secure, and more actively engaged in their communities.

In this annual report, you will read about how NCOA is applying three core competencies to improve the lives of older Americans:

- **Innovation**—Helping people and organizations to develop better services and strategies for meeting the needs of older people and helping take the best of the proven ideas to “scale” nationwide.

- **Advocacy**—Being the nation’s most trusted national voice and advocate for older people, especially disadvantaged and vulnerable seniors, and for the community organizations that serve them.

The same burning passion that brings us together also spurs us to strive to do much more in the future. The aging of our society presents enormous challenges and opportunities that we must address, and it won’t be enough to rest on our laurels. In the years ahead, we are determined to have 100 times the social impact that we have today.

If you are one of NCOA’s current members, staff, partners, or financial supporters, we thank you for your essential contributions to our work. If you are new to NCOA, we invite you to join us on this challenging and deeply rewarding quest to make life better for millions of older Americans and for our future selves.
Benefits for Seniors

Helping older Americans access benefits that can improve the quality of their lives...

Mission & Goals
NCOA believes that all older Americans—particularly those with limited incomes and resources—should have easy access to the private and public benefits programs for which they are eligible. Unfortunately, enrollment rates in many benefits programs have historically been low.

Up to 4.2 million Medicare beneficiaries with limited incomes are eligible for—but not receiving—critical assistance to help pay for their prescription drugs under Medicare Part D. And only 13 percent of individuals who are eligible participate in one of the Medicare Savings Programs (MSPs), which help beneficiaries with limited means pay their Medicare premiums and cost sharing.

NCOA is working to change these numbers. Through a network of community-based organizations, NCOA is providing outreach, education, eligibility screening, and enrollment assistance to older adults across the country. NCOA also is advocating for a nationwide infrastructure in which individuals can enroll in all of the programs for which they qualify at one time—a person-centered approach that is effective and saves both time and resources.

Key Accomplishments

Collaborative Leadership
NCOA leads the Access to Benefits Coalition, a network of more than 100 national organizations and 40 local coalitions involving hundreds of community-based organizations that was created to help seniors and younger people with disabilities get the benefits for which they are eligible. Since January 2006, this coalition has produced nearly 100,000 enrollments in the Medicare Part D Extra Help/Low-Income Subsidy (LIS).

NCOA also has partnered with AstraZeneca Pharmaceuticals to create My Medicare Matters, an initiative designed to help individuals learn more about Medicare’s prescription drug coverage. In its first year, My Medicare Matters held 3,100 community education events nationwide and individually counseled 210,000 people about their drug coverage options. The campaign, which generated significant national and local media coverage, earned a Silver Anvil award from the Public Relations Society of America.

My Medicare Matters also includes a user-friendly Web site where older adults and their caregivers can learn about their Medicare benefits. In 2007, My Medicare Matters launched My Medicare Community, an online community for professionals and volunteers who work with people with Medicare. As of early December, the community had 800 members and was growing steadily.
INNOVATION

The impact of NCOA’s benefits outreach and enrollment efforts is evident nationwide. With NCOA’s support, community-based organizations have helped to generate 2 million screenings and identified more than $6 billion in benefits for older adults using NCOA’s BenefitsCheckUp™, a free Web-based service that screens individuals for more than 1,550 benefits programs. BenefitsCheckUp™ continues to garner awards and recognition; USA Today named it “a gem of personal financial cyberspace” in June 2007.

To spur even greater creativity at the local level, NCOA has established the innovative Benefits Enrollment Fund, which pays local agencies a set amount for each person they help enroll in key benefits programs. In a successful pilot project, 19 agencies in the Gulf Coast region helped 1,419 older hurricane survivors access critical public benefits—benefits with an expected lifetime value of more than $10.6 million.

ADVOCACY

NCOA is a leading advocate for improving seniors’ access to benefits. It worked to create a Center on Senior Benefits Outreach and Enrollment in the 2006 reauthorization of the Older Americans Act (OAA). NCOA also testified before Congress, released a report, and worked with lawmakers to advance legislation to significantly strengthen Medicare assistance for low-income beneficiaries through the MSPs and Medicare Part D Extra Help.

“ As an eldercare consultant, I use and refer clients to BenefitsCheckUp™ frequently. Thank you so much for providing such a needed and excellent resource.”

—Ruth Sanderson, RN, BSN, Eldercare Consultant, Tacoma, WA

Making a Difference

Juanita and Betty’s Story

Like many Americans today, Juanita Martis juggles her job, her family, and her aging parents, who have needed progressively more assistance in recent years. Juanita’s mother, Betty Romanyzyn, suffers from health problems and recently became concerned about her ability to remain independent in her apartment. Although Juanita helps her every day, she was losing hope that her mother would be able to remain in her home.

Just when things seemed unmanageable, Juanita heard about BenefitsCheckUp™, offered through the Lehigh Valley Alliance on Aging in Bethlehem, PA. A volunteer helped Juanita input all of her mother’s information into the program. Minutes later, BenefitsCheckUp™ returned a complete printout of all the benefits to which Betty was entitled—including a Pennsylvania Department of Aging waiver to pay for in-home care, Life Line home alert services, a Medicare Savings Program, and a rental rebate program. All told, BenefitsCheckUp™ found $17,792 worth of benefits for Betty, allowing her to remain in her own home.

Betty’s case is exceptional, but many individuals find benefits they were unaware of when they use BenefitsCheckUp™. Thanks to the program, 3,571 older adults in the Lehigh Valley alone have received $1.1 million worth of new benefits in the past three years.
Healthy Aging

Promoting proven programs that can help older Americans remain healthy and vital...

**Mission & Goals**

NCOA is working to help older Americans live healthier and longer lives by increasing the quality and accessibility of health programming in communities nationwide. Older Americans are disproportionately affected by chronic diseases that account for seven of every 10 deaths and more than three-quarters of all health expenditures in the U.S.

“NCOA’s leadership in the national dissemination of the Chronic Disease Self-Management Program has provided our agency with a valuable vehicle to reach out to diverse older adults.”

—Maria Oquendo-Scharneck, Health and Diversity Coordinator, AgeOptions, Oak Park, IL

Research shows that specific interventions can have a significant impact on older adults’ health, yet many seniors simply don’t have access to programs that can provide these benefits. NCOA believes that the 29,000 community-based organizations currently reaching 7 to 10 million older adults each year are a valuable and untapped resource in offering these evidence-based programs. Through its Center for Healthy Aging, NCOA is working to identify, translate, and disseminate evidence on what works in areas such as chronic disease self-management, fall prevention, physical activity, mental health, and healthy eating.

**Key Accomplishments**

**COLLABORATIVE LEADERSHIP**

NCOA coordinates the National Falls Free™ Coalition, a collection of national organizations and state coalitions working to reduce falls and fall-related injuries among older adults. Coalition members work to advance a legislative strategy and identify and promote best practices. In 2007, the coalition released *Creative Practices in Home Safety Assessment and Modification*, a report spotlighting 10 creative and replicable programs and practices that can reduce home hazards for older adults.

NCOA also brings health education and awareness programs directly to older Americans through its health education program. In 2007, more than 1,100 seniors participated in NCOA’s Connect the Dots program, designed to help them understand the risk factors for diabetes and hypertension and how they can access Medicare’s prevention benefits. With corporate sponsors, NCOA conducted similar campaigns on critical health topics such as shingles, peripheral artery disease, and normal pressure hydrocephalus.

Under the leadership of the University of Colorado Health Sciences Center, NCOA also co-directs the Practice Change Fellows program, a network dedicated to improving geriatric care and shaping health policy. Each year, 10 of the nation’s most promising physicians, nurses, and social workers receive a two-year fellowship to help improve elder care.

**INNOVATION**

NCOA plays a pivotal role in the U.S. Administration on Aging’s (AoA’s) Evidence-Based Disease Prevention Program. In 2007, it helped AoA launch its second national initiative, which includes three-year grants to 24 states to facilitate adoption of evidence-based health promotion and disease prevention programs for older adults. NCOA operates a National Technical Assistance Center for grantees, which provides forums for shared learning and consultation. In 2007, NCOA secured $8.4 mil-
lion over five years from the Atlantic Philanthropies to strengthen the AoA initiative.

NCOA’s work is having an impact nationwide. Aging service organizations in more than half of the states now offer the Stanford Chronic Disease Self-Management Program, Enhance Fitness, Matter of Balance, or similar programs designed to help seniors from diverse backgrounds live healthier lives. Each month, 35,000 users visit the Center for Healthy Aging’s Web site, which has become the single-best source for information on healthy aging programs.

NCOA also has identified best practice physical activity programs for older adults. With the Healthy Aging Research Network and the Comprehensive Health Education Foundation, NCOA established a Web-based registry of local physical activity programs called Active Options. In 2007, 14 states started using ActiveOptions.org to inventory current programs.

**ADVOCACY**

NCOA is a national voice for the importance of older adult health programming based on proven scientific evidence. Thanks to its work, evidence-based health programming is now a major component of AoA’s Choices for Independence strategy to modernize health and long-term care for older adults. Total public-private investment in evidence-based prevention programming in the aging services network now exceeds $50 million. In 2006, NCOA was pivotal in inserting new language into the OAA that encourages evidence-based health programming at the community level.

In 2007, NCOA also worked successfully with members of Congress to advance legislation that incorporated recommendations from the National Falls Free National Action Plan developed by the Falls Free™ Coalition.

**Making a Difference**

**Kathy Stangl’s Story**

At age 55, Kathy Stangl of Des Moines, IA, was diagnosed with a rare, progressive lung disease called lymphangioleiomyomatosis (LAM).

“I thought it would kill me before I could spell it!” Stangl said. “Twenty-four letters, and the doctor said I’d be dead in six months…what a race.” Instead of giving in, Stangl got educated.

In 2007, she joined 15 other older adults living with chronic disease in a self-management workshop designed to teach her how to manage her condition. Developed by researchers at Stanford University, the program is funded through the U.S. Administration on Aging. NCOA provides technical support to the program.

“I loved it,” Stangl said of the six-week workshop. “I learned how to pace myself using action plans and not to try to do too much. Now, I focus on what I can do to make my life as joyous and meaningful as possible.”

Stangl learned to use tools such as brainstorming, problem-solving, and action plans to deal with the pain, fatigue, shortness of breath, and anxiety of her condition.

Stangl was so impressed with the class that she now teaches it. The program uses two trained peer leaders, one or both of whom have a chronic condition, to facilitate the small-group meetings.

“Being involved as a peer leader means I have the opportunity to help empower others to take charge of their conditions and of their lives,” Stangl said. “The class helps you live life, not just endure it.”
Work & Volunteering

Supporting innovative efforts to engage older Americans in their communities...

Mission & Goals
NCOA believes that older adults can play an integral role in solving communities’ critical social problems. The impending retirement of the baby boom generation offers an unprecedented opportunity to tap into these individuals’ skills, time, and desire to stay actively engaged in their communities. NCOA works to identify and disseminate innovative programs that will engage older adults as both paid employees and volunteers.

Key Accomplishments

Collaborative Leadership
In 2007, NCOA received a three-year grant from the AoA to provide training and technical assistance to a dozen projects that serve grandparents raising grandchildren, parents raising children with special needs, and/or caregivers of frail elders. A primary goal of the Multi-Generational and Civic Engagement Initiative will be to identify and support effective programs that have the potential for wide-scale replication.

“NCOA’s civic engagement initiatives have prepared our agency for the future by testing volunteer strategies and self-directed teams and adding sophistication to our volunteer efforts, specifically targeted to a new generation of older adults.”

—Christine Beatty, Director, Madison Senior Center, Madison, WI

NCOA also has continued its key role in two federal programs—the Senior Community Service Employment Program (SCSEP) for nearly 50 years and the Senior Environmental Employment (SEE) program for nearly 20, helping to provide job training and unsubsidized employment opportunities for mature workers. In fiscal year 2007, NCOA’s SCSEP sites served more than 4,036 older workers. NCOA placed 655 mature workers in unsubsidized employment in job assignments ranging from receptionists and clerical aides to healthcare workers. NCOA’s SEE program served 135 enrollees in fiscal year 2007.

Innovation
Through its Wisdom Works: Building Better Communities initiative funded by MetLife Foundation, NCOA is promoting the use of self-directed teams of new retirees to help local organizations meet community needs. In pilot projects, teams of older adults came together to identify and tackle critical issues such as childhood obesity and West Nile virus. Based on their success, NCOA is building a model program that provides leadership training for key program staff, identifies lead volunteers, and uses peer mentors to help older adults take responsibility to resolve problems. In 2007, Wisdom Works identified six additional senior centers to expand the program and set the stage for taking the concept to scale nationwide.

NCOA’s RespectAbility initiative also is developing 21st century approaches to establishing new roles for older volunteers. RespectAbility has identified and funded 22 Models of Significant Service sites to place older adults in leadership and professional level roles that help organizations fulfill their mission. RespectAbility launched a Continuous Learning and Innovations Community, an online tool where members can share, learn, and exchange resources. It also is developing a Web-based evaluation tool to capture key
metrics to demonstrate the return on investing in older adults as a new talent pool.

**Advocacy**

NCOA’s MaturityWorks Alliance is a national voice and advocate for public policies, business practices, and societal attitudes that enable employers to recruit, retain, and value mature workers. In 2007, the alliance offered Webinars on managing a multi-generational workforce, phased retirement, and cognitive fitness at work. It also reviewed proposed legislation on mature workers and career transitions and submitted comments to the U.S. Department of Labor on the report of its Older Worker Taskforce.

NCOA also was instrumental in having language on the value of civic engagement among older adults included in Congress’ 2006 OAA reauthorization. The act now includes funding for multi-generational and civic engagement programs and calls for a comprehensive strategy for using older adults to address local needs of national concern.

### Making a Difference

**Dave Rudy’s Story**

Like many of today’s retirees, Dave Rudy had a successful professional career before retiring seven years ago. He soon began looking for places where he could put his skills to use to benefit his community.

His search led him to the Newark Senior Center in Newark, DE, where he quickly saw that many people with a lifetime of knowledge and experience were being underutilized by non-profit organizations. The executive director approached him about becoming a key volunteer for NCOA’s Wisdom Works initiative, a model program designed to empower self-directed teams of older adults to help local organizations meet critical community needs.

Rudy jumped on board and helped to create the Short-Term Assistance Network for Nonprofits, a group of 15 committed senior volunteers who plan and support a variety of tasks and projects. Using his professional experience as a team leader, Rudy and his fellow volunteers updated and improved the volunteer training program at a local hospice organization, modified the rental agreement text for the senior center, and is advising another senior center as it works toward accreditation.

**Jackie Warren’s Story**

Jackie Warren came to the Senior Community Service Employment Program (SCSEP) at the Northern Kentucky Community Action Commission after a series of financial setbacks that had left her reeling. Because she wasn’t old enough to receive Social Security benefits, she desperately needed a job but didn’t know where to start.

With a good personality and a friendly, caring attitude, Warren was a prime candidate for a job. The main stumbling block was that her son, who had lost his job and gone back to school, was depending on her to care for his two school-age daughters.

SCSEP staff stepped in to help. In addition to finding Warren a position as a child transportation worker, they investigated and learned that Warren’s son was eligible to receive subsidized after-school childcare for his daughters, and they even found which programs had openings. As a result, when Warren was offered the job, she was able to take it without worry. She is now happily earning a living knowing that her granddaughters are cared for and safe.
Staying Independent

Advocating for initiatives that help seniors stay independent as long as possible...

**Mission & Goals**

NCOA is working to support all older Americans in their efforts to remain independent in their own homes and communities. The nationwide network of aging services organizations funded through the OAA plays a critical role in delivering services that can help seniors stay healthy and living on their own.

NCOA is a national advocate for increasing funding for OAA programs, as well as for promoting other initiatives that can help older homeowners tap the equity in their homes to help them successfully age in place.

“NCOA is a national voice and champion for aging services providers at the local level. NCOA’s advocacy work is not about abstract policy, but about real programs that make a critical difference in the lives of the people we serve.”

—Diane Harry, Senior Services Director, St. Joseph’s Mercy Health Center, Hot Springs, AR

**Key Accomplishments**

**Collaborative Leadership**

As the 2007 chair of the 54-member Leadership Council of Aging Organizations (LCAO), NCOA led the effort to create a set of Long-Term Care Financing Principles and a permanent Long-Term Care Committee and apply innovative organizational strategies to strengthen the organization. The LCAO is a coalition of national nonprofit organizations concerned with the well-being of America’s older population and committed to representing their interests in the policy-making arena.

**Innovation**

NCOA is working to expand the resources available to seniors interested in tapping their home equity to help them age in place. In 2007, NCOA formed the Aging in Place Reverse Mortgage Counseling Network in partnership with the AoA and Money Management International, a nonprofit credit counseling organization. The network brings aging and disability resource centers and area agencies on aging into the reverse mortgage consumer counseling arena. Members provide counseling to seniors, explaining terms and financial implications of reverse mortgages, as well as alternatives to a loan. Counselors also discuss social services that, in conjunction with a reverse mortgage, may fill gaps between income and expenses. During the initial pilot testing phase of the project, network members counseled more than 300 older homeowners. The project is set to expand to 20 states in 2008.
ADVOCACY

NCOA is a leading national advocate for the OAA. It played a pivotal role in helping to reauthorize the OAA in 2006, creating new programs for civic engagement and evidence-based health promotion. The OAA is the backbone of services to America’s aging population, funding services such as meals programs, senior centers, older worker programs, and caregiver support.

In 2007, NCOA launched a Support Our Seniors Campaign to urge Congress to increase OAA funding. During the campaign, aging advocates sent more than 1,100 e-mails to their members of Congress, telling their personal stories of why OAA funding is critical to their communities. The grassroots advocacy effort paid off when Congress approved $111 million in increases to the OAA for fiscal year 2008.

Making a Difference

**Alta Stevens’ Story**

Hot meals delivered to an older adult’s doorstep can be the one service that makes it possible to stay independent. The OAA-funded Meals on Wheels program also is a critical way to check on vulnerable seniors who are living alone. Two drivers from the Neighborhood House Association in Lorain, OH, learned this lesson in a compelling way in 2007.

One day, Alta Stevens, 70, who had been receiving meals for four years and was always waiting for the driver, didn’t answer her door. The Meals on Wheels drivers—Dorothea Glenn and Doris Lawson—continued to knock.

“The driver peeked in the window and saw Mrs. Stevens on the floor,” explained Lisa Sierk, development director. Stevens was able to scoot herself over to unlock the door, but she did not remember who she was, how old she was, or what had happened to her. Glenn and Lawson quickly called 911, then stayed to keep Stevens alert until the ambulance arrived.

Stevens’ daughter had just checked on her mother, so the timing of the Meals on Wheels delivery made all the difference. As it turns out, Stevens suffered a minor stroke, but received timely care and is back in her own home receiving meals again.

“She calls our drivers her ‘angels on wheels,’” Sierk said. “These are lower income people … living on their own who can’t cook for themselves any longer,” she added. Having a meal helps “keep someone in their own home and in their comfortable environment as long as possible.”
Membership

Mission & Goals
NCOA seeks to support professionals throughout the aging network by offering members access to timely news and information, best practices in the field, educational opportunities, and constituent groups designed to enhance their professional development.

Accomplishments
In March 2007, NCOA collaborated with the American Society on Aging to host the field’s largest meeting. Approximately 3,200 people attended the annual conference in Chicago, where they heard presentations on a wide range of critical issues facing members of the aging network. NCOA also hosted 12 Webinars throughout the year as part of its Healthy Aging Briefing series. National experts discussed current topics such as cutting-edge senior center programming, falls prevention, medication use among seniors, civic engagement, and caregiver resources. More than 1,300 individuals logged onto the briefings in 2007.

NCOA interest groups continued to offer members opportunities for networking, leadership, and recognition. The National Institute of Senior Centers (NISC) has approved 128 senior centers for accreditation or reaccreditation, a process that helps centers critically evaluate their programs in order to meet national standards. NISC also helped members prepare for and publicize the nation’s first Senior Center Month in September 2007 to celebrate the vital services they provide to the community.

NCOA continued to provide useful information to help members do their jobs better. In 2007, NCOA redesigned its award-winning Web site to make it easier to navigate and more helpful for aging-field professionals, seniors, their families, and others. NCOA also launched a new online service called My NCOA, which allows visitors to get timely news targeted to their area of interest and donate to NCOA online. An array of other publications and e-newsletters continue to keep members up-to-date on critical issues related to their field.
Finance

Goals & Accomplishments

NCOA continued to generate positive changes in net assets and grow reserve balances in fiscal year 2007, extending to five straight years of positive growth in unrestricted net assets. The changes in “unrestricted” net assets may be viewed as our results of “operating” activities for the year, which excludes the additional awards that are “restricted” or reserved for future activities.

The net change in unrestricted assets was $0.7 million for fiscal year 2007, bringing the balance in unrestricted net assets at the end of 2007 to more than $2.5 million. The operating revenues for 2007 were $41.5 million with federal grants accounting for 69 percent of the funding, as NCOA continues to diversify and raise revenue from non-governmental sources. This percentage of non-federal funding is up significantly (to 31 percent) from the level five years ago when these sources only made up about 13 percent of NCOA’s revenue.

For 2007, as in previous years, NCOA continued to maximize resources used to support the organization’s core mission, expending 95 percent of its operating resources on direct programs.

The following charts present the highlights of the revenue and expenditure distributions by categories for fiscal year 2007. Full audited financial statements for fiscal year 2007 are available upon request.
NCOA Supporters

Foundations
AARP Foundation
MetLife Foundation
The Archstone Foundation
The Atlantic Philanthropies
The GAP Foundation
The John A. Hartford Foundation
The Robert Wood Johnson Foundation
The Virginia G. Piper Charitable Trust
Wallerstein Foundation for Geriatric Life Improvement

Other Supporting Partners
Home Safety Council
Mathematica
Money Management International
National Assembly
National Association of Area Agencies on Aging
Pharmaceutical Research and Manufacturers of America
Rutgers Center for State Health Policy
Volunteer Impact Fund, spearheaded by The UPS Foundation

Government
National Heart, Lung, and Blood Institute
State of Arizona
U.S. Administration on Aging
U.S. Agency for Healthcare Research and Quality
U.S. Centers for Disease Control & Prevention
U.S. Centers for Medicare & Medicaid Services
U.S. Corporation for National & Community Service
U.S. Department of Health & Human Services, Assistant Secretary for Planning & Evaluation
U.S. Department of Labor
U.S. Environmental Protection Agency
U.S. Substance Abuse & Mental Health Services Administration
Washington State Department of Health & Human Services

Corporations
AstraZeneca Pharmaceuticals LP
Bristol-Myers Squibb
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