

## **Executive Summary**

Lutheran Settlement House (LSH) respectfully requests \$35,000 to support the health, wellness, and independence of low-income older adults in the River Wards neighborhoods.

Good health is universally sought after and cherished—it's the key to our independence; while we don't always notice when we have it, its absence can be devastating. As we age, managing our health often becomes increasingly complicated, especially for older adults with multiple chronic conditions, like diabetes and hypertension. Layer on the challenges that come with living on a fixed income and accessing reliable transportation and quality healthcare, and maintaining health and wellness becomes even more complex.

It's widely accepted that for older adults—especially those from marginalized communities—to live safely, healthfully, and productively, our communities need more age-friendly programs and policies that ensure access to fresh food, exercise, and social engagement (“Actualizing Better Health and Health Care for Older Adults” Health Affairs, 2021). In tandem with all the other health and wellness services LSH provides—including access to fresh produce and groceries, and cooking, art, yoga, fitness, and other classes—1:1 health coaching helps older adults manage their health and maintain their independence.

With support from FFA, we can assure low income older adults in our community have ongoing access to evidence-based health coaching proven to help them live healthier more fulfilling lives.

## **Project Details**

### **The Problem**

Data show that 77% of adults 50+ want to remain in their homes for the long term (“Despite Pandemic, Percent of Older Adults Who Want to Age in Place Stays Steady,” AARP). And, health—mental, physical, emotional, spiritual, and social—is critical to maintaining independence. Not surprisingly, “aging in place” is among the top priorities for members of LSH's senior center (Member Focus Group, 2022).

### **Our Solution & Our Population**

EnhanceWellness (EW) is an evidence-based program that connects older adults with a personal health and wellness coach to improve their physical, emotional, and social well-being. Past research has shown that the EW program can lead to a 72% decrease in hospital stays; 35% decrease in use of psychoactive drugs; 11% decrease in depression; and 18% decrease in physical inactivity (“Preventing disability and managing chronic illness in frail older adults: a randomized trial of a community-based partnership with primary care,” Journal of the American Geriatrics Society).

The EW program has three key phases: screen, plan, action.

- First, an EW screening visit identifies the participant's personal strengths and risks through a detailed health questionnaire and interview with an EW Coach.
- Next, the participant and EW Coach craft an individualized Health Action Plan focused on areas of the participant's choosing. Participants are then encouraged to share the plan with their physician, family, or other members of their support network.
- Finally, the participant moves into action with the support of their EW Coach, who offers ongoing encouragement, feedback, and monitoring over the next six months. The EW Coach assists with problem solving, health education, and referrals to support groups, activities, and other resources.

Funding from FFA will supplement existing funding from the Gordon Charter Foundation and allow LSH to continue offering the EW program to all interested older adults in our community. With approximately 175 active members, we anticipate that over the course of the year, at least 35 older adults will participate in all three phases of the program. In addition, based on our past experience, we anticipate at least 260 visits with our EW coach from older adults not enrolled in the EW program. In the

past, these visits have encompassed everything from 1:1 consultation about emergent issues, including prescription medication questions to blood pressure checks, and requests for referrals.

During our initial implementation, we have found that many of the older adults we serve want help managing prescriptions, interfacing with healthcare providers, building strength, and avoiding falls. As a Registered Nurse, and current Doctoral student, our EW Coach Ayesha, has accompanied participants to healthcare appointments, conducted fall-prevention screenings and interventions in participants' homes, and connected participants with fitness programs (cardio drumming, yoga, belly-dancing) on-site at our senior center and in other parts of the city.

The demographics of our senior center are largely reflective of the demographics of older adults living in the River Wards neighborhoods. Currently, Black/African Americans, women, and individuals managing chronic conditions are over-represented among EW participants. We expect the demographic make-up of EW to remain similar; however, funding from FFA will help us extend the program and serve more participants.

<b>Current Senior Center Membership</b>	<b>Current EnhanceWellness Participants</b>
Female: 80% Male: 20%	Female: 89% Male: 11%
55-59: 2% 60-64: 9% 65-69: 22% 70-74: 20% 75-84: 31% 85+: 16%	55-69: 39% 70-84: 50% 85+: 11%
Black/African American: 16% Latinx: 2% Asian/Pacific Islander: 1% White: 81%	Black/African American: 42% White: 58%
Low Income: 89% Unknown/Unreported Income: 11%	Managing at least one chronic condition: 100%

### **Our Partners**

Our senior center, food access, and nutrition program are lucky to have many nonprofit and philanthropic partners. EnhanceWellness, and its companion services, including our nutrition, exercise, and social health programs, have recently received support from:

- Pennsylvania Corporation for Aging (PCA) is one of our longtime senior center funders. PCA covers a portion of our Senior Services and Nutrition Director, Meg Finley's salary. Meg is responsible for overseeing and evaluating the EW program.
- A small portion of a \$150,000 grant from the NextFifty Initiative received in FY22 supported the EW program through December 2022.
- A \$15,000 grant from the Gordon Charter Foundation is supporting the EW program in FY23.
- The Patricia Kind Family Foundation supports our food pantry and farm stand, which is an important resource for EW participants. We are currently in the third year of a three-year \$45,000 total grant.
- The Pierce Family Foundation currently supports our food pantry and farm stand. We received the second payment of a two-year \$30,000 total grant in spring FY22.
- Philabundance provides ongoing in-kind support of our food pantry and farm stand by donating fresh produce and shelf-stable goods.

- The Agatston Urban Nutrition Initiative provides ongoing healthy cooking and nutrition workshops at our senior center.
- We regularly receive in-kind support from community members who volunteer their time to teach classes based on senior center members' interests (yoga, drawing, fitness).

### **Our Implementation & Evaluation Plan**

EW has been successfully implemented with a range of populations in a variety of settings, including senior centers like ours, YMCAs, churches, parks and recreation centers, and retirement communities. We're excited to secure funding that will allow us to sustain the program through two 6-month cycles. Over the course of 12-months, we look forward to collecting data that will help us demonstrate the program's impact to individual donors, and healthcare and foundation partners.

Funding from FFA will allow us to provide a robust EW program to all interested senior center members. Our goals and anticipated outcomes for the program are outlined below

1. Make the EW program available to all interested senior center members.  
Over the course of the funding period, we anticipate...
  - a. engaging at least 35 older adults in all three phases of the EW program - screening, planning, and action.
  - b. 100% of older adults who engage in all three phases of the EW program will make progress toward achieving the goals outlined in their individualized Health Action Plan.
  - c. 80% of older adults who engage in all three phases of the EW program will fully implement their Health Action Plan.
  - d. 100% of older adults who engage in all three phases of the EW program will report an expanded understanding of their wellness needs.
  - e. at least 90% of those who engage in all three phases of the EW program will report feeling more independent and personally empowered.

Health Action Plans are participant-centered and encompass physical, social, and emotional health. Example areas of focus include: fall prevention; strength, balance, and flexibility; social health/sense of belonging, purpose, and community; chronic condition management; mental health, including anxiety and depression; home safety; and medication adherence.

2. Provide general health and wellness support to senior center members.
  - a. While not everyone is ready to engage in a six-month health coaching program, many senior center members and food pantry visitors appreciate easy access to a healthcare professional who can quickly answer questions about medication, nutrition, and insurance. Over the course of the funding period, we anticipate at least 260 ancillary visits with our Health Coach, Ayesha.
3. Expand relationships with local healthcare providers serving older adults in the River Wards neighborhoods.
  - a. We anticipate deepening our existing relationships with local healthcare providers and expanding our referral network by building relationships with at least three new healthcare providers.
4. Provide community-based health and wellness learning experiences for local nursing students interested in working with older adults.

- a. Through a new partnership with Cabrini College, we anticipate providing one class of nursing students with practical learning experiences, while offering senior center members health services designed to complement the EW program.

### **Our Experience**

All of our senior center programs, carefully developed over the past 40 years, seek to promote healthy aging for older adults in our community—many of whom have lived within walking distance of LSH for their entire lives. Our Senior Services and Nutrition Director, Meg Finley, joined LSH in early 2018. Under her leadership, our activities have grown in depth and breadth, making the center an important anchor for older adults in the River Wards neighborhoods. Meg and her team have facilitated the EnhanceWellness program for two cycles and have already seen tremendous results.

Recently, a senior center member, “Mary,” began working with our EW Health Coach, Ayesha. Mary has diabetes and had recently experienced a number of fainting episodes. Each time she fainted, Mary was sent to the Emergency Department, received a battery of tests, and returned home still unsure why she had fainted and how to prevent it from happening again.

After meeting with Mary, Ayesha quickly realized what other healthcare providers had missed: Mary couldn’t read. Each time Mary met with her doctors, she received written instructions for managing her diabetes and other chronic conditions. Embarrassed to share that she couldn’t read, Mary took the instructions home, but then struggled to know which medications to take when, which medications needed to be taken with food, and so on. Mary’s fainting episodes were a result of medication adherence mistakes.

After realizing the cause of Mary’s episodes, Ayesha and Mary worked together with her healthcare providers to make sure Mary had the resources she needed to understand and follow her medication regimen. Mary hasn’t fainted since. In an overburdened healthcare system that often lacks the resources to provide individualized care, people like Mary fall through the cracks. Combining personalized screening with 1:1 coaching, EW is an empowering and life sustaining service.

### **DEI at LSH**

DEI has been at the center of our work since our founding more than 120 years ago. As an organization, we’re committed to building a culture that is inclusive, accessible, and responsive. The diversity of our staff, board, volunteers, and clients informs our work in countless ways.

After several years of managing DEI priorities through a centralized anti-racism committee, we recently shifted our approach. Rather than housing DEI priorities within a single committee, LSH Leadership now engages small groups of interested staff/clients/volunteers in short-term project-based activities throughout the year (e.g. revising our employee handbook using a DEI lens, exploring opportunities to connect more LGBTQ+ survivors with our services, etc.). We expect this approach will allow us to engage more perspectives and amplify more voices; avoid overburdening certain staff members; and sustain and build energy for this work.

### **Alignment with FFA Values**

LSH’s organizational values are well-aligned with FFA’s values. The EnhanceWellness program, in particular, is an excellent example of our shared commitments to integrated services, collaboration, and service to diverse populations.

EnhanceWellness, like all of LSH’s programs, is a collaborative effort. The EW program is currently supported by a range of philanthropic and nonprofit partners, and individual community members who contribute their financial and in-kind resources and time.

One of the special things about LSH’s senior center, is its existence within a portfolio of programs that support people of all ages and circumstances. As a multi-service provider, we’re able to

draw on the strengths of non-traditional partners, link older adults with intergenerational volunteer and social opportunities, and exchange knowledge and resources with a range of community stakeholders.

Equity is one of our core values and at the heart of our work. EW provides an important resource to underserved older adults in a rapidly gentrifying section of the city. The program was first launched based on member feedback and continues to be especially popular among older adults with fewer resources and more complex health issues.

### Lutheran Settlement House Senior Center Budget

<b>Personnel</b>	<b>Total</b>
Senior Services and Nutrition Director	58,853
Senior Services Activities Coordinator	35,020
EnhanceWellness Health Coach (Part-Time Position)	25,000
Volunteer Manager @25%	10,750
Senior Services Office Manager	37,050
Senior Center Kitchen Coordinator	32,343
Senior Center Counselor	35,374
Facilities and Maintenance Manager @35%	11,997
IT Manager @ 25%	11,250
Deputy Executive Director @10%	8,961
Executive Director @5%	6,304
Fringe Benefits (25%)	68,225
<b>Total Personnel</b>	<b>\$341,127</b>
<b>Program Costs</b>	<b>Total</b>
Activity and Class Instructor Fees	20,000
EnhanceWellness Fees	850
EnhanceWellness Staff Training	1,000
Shelf Stable Food for Food Pantry	2,500
Food Pantry Supplies	1,000
Printing, Marketing, and Office Supplies	5,000
<b>Total Program Costs</b>	<b>\$30,350</b>
<b>Operating Costs</b>	
Accounting Fees	2,000
CiviCore Organizational Database	1,000
Utilities	2,500
Insurance	1,000
<b>Total Operating Costs</b>	<b>\$6,500</b>
<b>Indirect Costs (10%)</b>	<b>\$37,798</b>
<b>Total Budget</b>	<b>\$415,775</b>

Internal Revenue Service

Department of the Treasury

District  
Director

230 S Dearborn St., Chicago, Illinois 60604

Evangelical Lutheran Church  
In America  
8765 West Higgins Road  
Chicago, IL 60631

Person to Contact:  
Peter J. Mazarakos, Jr.  
Telephone Number:  
(312) 886-1218  
Refer Reply to:  
EO: 201:PJM  
Employer Identification Number:  
41-1568278  
Effective Date of Group  
Exemption Ruling:  
January 1, 1988

Date: **APR - 5 1988**

Dear Applicant:

We have considered your application for a group exemption letter recognizing your subordinates as exempt from Federal Income Tax as organizations of the type described in Section 501(c)(3) of the Internal Revenue Code.

Our records shows that you were recognized as exempt from Federal Income Tax under Section 501(c)(3) of the Code. The exemption letter remains in effect.

Based on the information supplied, we recognize your named subordinates on the list you submitted as exempt from Federal Income Tax under Section 501(c)(3) of the Internal Revenue Code.

Additionally, we have classified the organizations you operate, supervise, or control, and which are covered by your notification to us as organizations that are not private foundations because they are organizations of the type described in Sections 509(a)(1) 509(a)(2) or 509(a)(3) of the Code.

Donors may deduct contributions to you and your subordinates as provided in Section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal Estate and Gift Tax purposes if they meet the applicable provisions of Sections 2055, 2106 and 2522 of the Code.

**APR 08 1988**

**ELCA SECRETARY**

Evangelical Lutheran Church In America

You and your subordinates are not required to file Federal Income Tax Returns as long as a tax-exempt status is maintained. But under Section 511 of the Code, an organization is subject to tax on its unrelated business taxable income. If you or your subordinates are subject to the tax, you must file an income tax return Form 990-T, Exempt Organization Business Income Tax Return.

You are not required to file Form 990, Return of Organization Exempt from Income Tax, if you meet the exception in Section 6033(a)(2)(A)(i) of the Code. Your subordinates are also not required to file Form 990 if they qualify as churches or intergrated auxiliaries of churches or otherwise meet the exceptions in Section 1.6033-2(g) of the Income Tax Regulations.

As of January 1, 1984, you and your subordinates are liable for taxes under the Federal Insurance Contributions Act (social security taxes) on remuneration of \$100 or more to each of your employees during a calendar year. You and your subordinates are not liable for the tax imposed under the Federal Unemployment Tax Act (FUTA).

A church or a qualified church-controlled organization as defined in section 3121(w)(3) of the Code however, may elect to exclude the wages paid to employees (other than for services performed in an unrelated trade or business) from social security taxes. This election must be made by filing Form 8274 by the day before the date your first quarterly employment tax return would be due under the revised law. If you or your subordinaes make this election, your employees who earn \$100 or more during a calendar year become liable for the payment of self-employment tax under section 1402 on the wages that you pay them. Once having made this election, you or your subordinates may not revoke it. For further information regarding this election please contact your Key District Director.

Evangelical Lutheran Church In America

Each year, at least 90 days before the end of your annual accounting period, please send the items listed below to the Internal Revenue Service Center at the address shown below.

1. A statement describing any changes during the year in the purpose, character, or method of operation of your subordinates;
2. A list showing the names, mailing addresses (including Postal Zip Code), actual addresses if different, and employer identification numbers of subordinates that since your previous report:
  - a. Changed names and addresses;
  - b. Were deleted from your roster; or
  - c. Were added to your roster.
3. For subordinates to be added, attach:
  - a. A statement that the information on which your present group exemption letter is based applies to the new subordinates;
  - b. A statement that each has given you written authorization to add its name to the roster;
  - c. A list of those to which the Service previously issued exemption rulings or determination letters;
  - d. A statement that none of the subordinates is a private foundation as defined in Section 509(a) of the Code if the group exemption letter covers organizations described in Section 501(c)(3);
  - e. The street address of subordinates where the mailing address is a P.O. Box; and
  - f. The information required by Revenue Procedure 75-50, 1975-2 C. B. 587 for each subordinate that is a school claiming exemption under Section 501(c)(3). Also include any other information necessary to establish that the school is complying with requirements of Revenue Ruling 71-447, 1971-2 C. B. 230. This is the same information required by Schedule A, Form 1023, Application for Recognition of Exemption Under Section 501(c)(3) of the Internal Revenue Code.



Evangelical Lutheran Church In America

4. If applicable, a statement that your group exemption roster did not change since your previous report.

The above information should be sent, "Attention: Entity Control Unit," to the following address:

Internal Revenue Service Center  
Kansas City, Missouri 64999

This determination does not apply to any of your subsidiaries organized and operated in a foreign country.

We are enclosing a copy of Revenue Procedure 75-50. This sets forth guidelines and recordkeeping requirements for private schools recognized as exempt from Federal Income Tax under Section 501(c)(3) of the Code. You should advise those subordinates that operate schools of the requirement of this procedure.

The Service Center that processes your returns will send you a Group Exemption Number. You are required to include this number on each Form 990, Return of Organization Exempt from Income Tax and Form 990-T, Exempt Organization Business Income Tax Return. Please advise your subordinates of this requirement and provide them with the Group Exemption Number.

The prior group exemption letters of the following subordinates are superseded:

The American Lutheran Church, Lutheran Church in America, and Association of Evangelical Lutheran Churches.

Please notify each of the above subordinates that their exemption letter is superseded.

Sincerely yours,

  
R. S. Wintrode, Jr.  
District Director

Internal Revenue Service

Department of the Treasury

Internal Revenue  
Service Center

Midwest Region  
Kansas City, Missouri

2306 E. Bannister Rd., Kansas City, Mo. 64131

► Evangelical Lutheran Church  
In America  
8765 W. Higgins Rd.  
Chicago, Il. 60631

Person to Contact: Ms. Martha Ala

Telephone Number: (816) 926-5401

Refer Reply to: Entity Control Unit

Date: July 13, 1988

Group Exemption Number: 9386

Dear Officer or Trustee:

The four-digit Group Exemption Number (GEN) as shown above has been assigned to your organization. This number is not to be confused with the nine-digit Employer Identification Number (EIN) previously assigned to your organization.

Form 990 (Return of Organization Exempt from Income Tax) and instructions require each central organization and its subordinates to show their group exemption number (GEN) in Item G of Form 990 in addition to their EIN.

Please advise any of your subordinates that are required to file an annual information return, Form 990, to place your group exemption number on their return.

If you have any questions, please contact the person whose name and telephone number are shown above.

Thank you for your help in this matter.

Sincerely yours,

*Doris Jean Johnson*  
Manager, Entity Control Unit *DJA*



**Evangelical Lutheran Church in America**

God's work. Our hands.

*Evangelical Lutheran Church in America  
Group Exemption Number: 9386*

**CERTIFICATION OF FEDERAL INCOME TAX EXEMPTION  
UNDER SECTION 501(c)(3)**

*for*

Lutheran Social Mission Society of Philadelphia  
d/b/a Lutheran Settlement House  
1340 Frankford Ave  
Philadelphia, PA 19125  
EIN: 23-1352365

Lutheran Social Mission Society of Philadelphia d/b/a Lutheran Settlement House is an affiliated social ministry organization recognized by the Evangelical Lutheran Church in America (ELCA) as being included under our Group Exemption Ruling. This inclusion establishes that this entity is exempt from Federal Income Tax under Section 501(c)(3) of the Internal Revenue Code and is not a private foundation as defined in Code Section 509(a). The four-digit Group Exemption Number 9386 is the same for the ELCA, its synods, its congregations, and its related entities. The nine-digit Employer Identification Number is different for each synod, for each congregation, and for other employing entities. The nine-digit number is used, for example, when federal withholding and Social Security contributions are filed by the employer.

The IRS issued the attached Group Exemption Letters dated April 5, 1988 and July 13, 1988, to the ELCA. In accordance with the terms of the April 5, 1988 letter, entities affiliated with the ELCA, who have provided the ELCA with their federal employer ID number, are exempt from Federal Income Tax under ELCA's Group Exemption Ruling.

November 27, 2019

Very truly yours,

Thomas A. Cunniff  
General Counsel

**Attachments**

April 5, 1988, ELCA Group Ruling Recognition  
July 13, 1988, ELCA GEN Assigned