

Executive Summary

Lutheran Settlement House (LSH) respectfully requests \$25,000 to support the health, wellness, and independence of low-income older adults in Philadelphia's River Wards neighborhoods. As we age, managing our health becomes increasingly complicated, especially for older adults with 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 independence 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 (Health Affairs). In tandem with all the other health and wellness services LSH provides—including access to free 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.

Project Details

The Problem

"Aging in place" is among the top priorities for members of LSH's Center for older adults; however, challenges associated with maintaining health—mental, physical, emotional, spiritual, and social—often get in the way (Member Focus Group, 2022).

Our Solution

[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. Based on the Chronic Care Model, EW is participant-centered and uses motivational interviewing techniques and validated assessment tools. Past research has shown that EW 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 (American Geriatrics Society).

EW has three key phases: screen, plan, action:

- **Screen:** In the initial visit, the EW Coach and participant complete a detailed questionnaire focused on identifying the participant's strengths and risks.
- **Plan:** Next, the participant and EW Coach craft an individualized Health Action Plan. Health Action Plans are participant-centered and encompass physical, social, and emotional health. Example areas of focus include: diet and nutrition; 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.
- **Action:** In this phase, the participant moves into action with the support of their coach, who offers ongoing encouragement, feedback, and monitoring over the next six months.

EW has been successfully implemented with a range of populations in a variety of settings, including centers like ours. LSH is one of only two organizations in PA that offers EW and the only organization in Philadelphia. Since we began offering EW in 2018, it's been extremely popular; however, we've also encountered challenges sustaining and growing EW, pausing and restarting several times during COVID-19 and as we fundraised to cover the cost of our EW Coach's salary as a Registered Nurse. After exploring several different avenues for making EW more scalable, sustainable, and community-engaged, this summer, we partnered with the New Kensington Community Development Corporation's (NKCDC) Community Health Worker (CHW) training program to explore delivering EW via a CHW rather than a Registered Nurse.

CHWs are frontline public health workers who are trusted members of the communities they serve. The CHW model is designed to bridge the gap between an over-burdened healthcare system and communities struggling with issues associated with the social determinants of health, or the conditions in which people are born, grow, live, work, and age. The CHW certification process equips CHWs to increase community members' health knowledge and self-sufficiency through outreach, community education, social support, and advocacy. There are no formal education pre-requisites to enroll in NKCDC's 120-hour paid CHW training program.

We believe the CHW model will be more effective—offering hyperlocal resource connection and linking participants with a coach who is both their neighbor and someone specially trained to address the social determinants of health; easier to scale given the abundance and accessibility of CHW training programs; and more financially sustainable for host organizations, like ourselves. To our knowledge, we are the first organization to implement EW using a CHW; our colleagues at EW are eager to see the results of our pilot!

With support from FFA, we're excited to pilot a robust CHW-led EW program. FFA funding will allow us to expand our Health Coach position from part-time to full-time and provide quarterly health education workshops focused on the most salient issues in EW participants' Health Action Plans, and open to all 175 Center members.

Our Population

The demographics of our Center are largely representative of the demographics of older adults living in our immediate neighborhood; however, historically, EW has reached a different population. To date, Black/African Americans, women, and individuals managing chronic conditions have been over-represented among EW participants. We anticipate this program will continue to serve a diverse population. Further, as we increase our CHW EW Coach's hours from part-time to full-time we will be able to serve more people in a deeper way.

Current Senior Center Membership	Current EW Participants
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%; Unreported Income: 11%	Managing at least one chronic condition: 100%

Our Partners

Our Center and food access and nutrition programs are lucky to have many nonprofit and philanthropic partners, including the Gordon Charter Foundation, Philadelphia Corporation for Aging, ELCA Foundation, Philadelphia Works, Patricia Kind Family Foundation, and Pierce Family Foundation. In addition, NKCDC's CHW training program, the University of Pennsylvania's Agatston Urban Nutrition Initiative, and our EnhanceFitness, Cardio Drumming, Qigong, and Yoga instructors are key EW implementation partners.

LSH's new part-time Health Coach is a recent graduate of NKCDC's CHW training program. LSH plans to host NKCDC's CHWs-in-training throughout the grant period, providing students with applied learning experiences, while offering health/wellness resources to Center members. NKCDC will also participate in resource fairs and other community events hosted by LSH throughout the grant period.

The Agatston Urban Nutrition Initiative will provide ongoing healthy cooking and nutrition workshops at our Center, many of which will utilize ingredients from our food pantry/farm stand and focus on health issues included in EW participants' Health Action Plans.

Given that many EW participants identify flexibility, balance, and strength-building as goals in their Health Action Plans, we consider our long list of paid and volunteer instructors key partners in EW's success.

Our Theory of Change

In 2018, we were selected to join Pew's multi-year Evaluation Capacity Building Initiative (ECBI). As part of our work with Pew, we created a Theory of Change and Strategic Evidence Plan to guide our data collection and program evaluation practices. Developed alongside LSH's strategic plan, our Strategic Evidence Plan provides performance indicators to track our progress and impact over time.

While the work within each of LSH's programs is distinct, all of our services are driving toward the same three overarching goals: improving physical and emotional well-being, building economic stability, and increasing social connections. We have long-term relationships with many of our clients and work across a

spectrum of need, from crisis interventions (outputs), to stabilizing services (short-term outcomes), empowering supports (medium-term outcomes), and sustained impact (long-term outcomes).

Below, we've included a sampling of the outcomes we're working towards. In the Center, this data is collected via case notes, participation and attendance data, annual screening data, and an annual survey delivered to our entire membership, including those who don't regularly attend in-person activities.

Stabilized (Short-Term Outcomes)

- Aware of Community-Based Resources
- Recognizes Personal Needs
- Aware of and Defines Support System

Empowered (Medium-Term Outcomes)

- Takes Action to Address Personal Needs
- Utilizes Community-Based Resources

- Strengthens Social Support Network

Sustained (Long-Term Outcomes)

- Improved Physical Well-Being
- Improved Emotional Well-Being
- Economic Stability
- Improved Social Connections

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, and recreation centers. Since the original national EW study, over 9,000 older adults have participated in the program and independent study results have shown that participants continue to realize significant decreases in depression and increases in physical activity ("Why Choose EnhanceWellness?")—both of which are closely connected to maintaining independent living.

With FFA funding, we will deliver a robust EW program to all interested Center members. Our goals and anticipated outcomes for the program are outlined below.

1. Make EW available to all interested Center members. During the grant period, we anticipate:
 - engaging at least 55 low-income older adults in all three phases of EW.
 - 100% of participants who engage in all three phases of EW will make progress toward achieving their Health Action Plan goals.
 - 80% of participants who engage in all three phases of the program will fully implement their Health Action Plan.
 - at least 90% of those who engage in all three phases of the program will report feeling more independent and personally empowered.
 - 100% of participants who identify nutrition-related goals will report that they eat healthier meals.
2. Provide general health/wellness support to Center members and low-income older adults who visit our pantry/farm stand.
 - While not everyone is ready to engage in a 6-month coaching program, many members and pantry visitors appreciate easy access to a public health professional who can answer health questions. We anticipate supporting at least 260 ancillary visits with our EW Coach.
3. Offer cooking classes and nutrition education workshops tailored to EW participants' goals.
 - Host weekly cooking classes using ingredients from the pantry/farm stand and focused on EW participants' health goals.
 - Host quarterly nutrition education workshops focused on EW participants' health goals.
4. Expand relationships with healthcare providers serving low-income older adults in our neighborhood.
 - Deepen existing relationships with local healthcare providers and expand the Center's referral network by building relationships with at least three new providers.
5. Provide community-based learning experiences for CHWs in NKCDC's training program.
 - Provide at least one cohort of CHWs with practical learning experiences, while offering Center members health services designed to complement EW.

Our Experience

For the past four decades, our Center has served as both a hub and an anchor for low-income older adults in Philadelphia's River Wards neighborhoods. Today, we serve more than 175 members, many of whom grew up within walking distance of the Settlement House and share memories of attending afterschool programs and summer camps at LSH in the 40s, 50s, and 60s. At the Center, members can visit with friends, pick up free groceries, attend health and fitness activities and art and computer classes, meet with a social worker, grab lunch, get help with taxes, and so much more. We offer more than 20 classes and events each week and as many as 50 people come through our Center doors every day.

Our Senior Services and Nutrition Director, Meg Finley, joined LSH in early 2018. Under her leadership, our activities have grown in depth and breadth. Meg and her team have facilitated the EW program for two cycles and have already seen tremendous results. In August 2023, we hired our first part-time (16-hours/week) CHW EW Health Coach, Ciara Shipton. Ciara is a recent graduate of NKCDC's CHW program. She recently completed the 2-day EW training.

DEI at LSH

In 2020, building on past initiatives, we formed a centralized Anti-Racism Committee. The committee worked hard to develop new processes for engaging in conversations about race, racism, and equity, and laid the groundwork for identifying agency-wide DEI priorities. After several years of managing DEI priorities through this centralized committee, in 2022, we shifted our approach. Today, LSH Leadership 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.). This fiscal year, our DEI task forces are focused on assessing equity in hiring and promotions and increasing Board diversity in partnership with DiverseForce.

In 2018, with support from Pew, we overhauled our approach to data collection and analysis. Equipped with more sophisticated demographic data, we began developing initiatives to reach new segments of the community. As a result of these efforts, in recent years we've seen our Center BIPOC membership double.

Alignment with FFA Values

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

EW, like all of LSH's programs, is a collaborative effort and 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. NKCDC's CHW training program and the University of Pennsylvania's Agatston Urban Nutrition Initiative are key implementation partners.

One of the special things about our 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 EnhanceWellness Budget**EXPENSES**

Personnel	Total
Senior Services and Nutrition Director @ 10%	6,297
Senior Services Activities Coordinator @ 20%	7,354
EnhanceWellness Coach @ 100%	41,600
Volunteer Manager @15%	6,644
Senior Services Office Manager @ 10%	3,890
Senior Center Social Worker @ 20%	7,428
Deputy Executive Director @ 5%	4,615
Fringe Benefits (25%)	19,457
Total Personnel	\$97,286
Program Costs	Total
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	3,500
Total Program Costs	\$28,850
Operating Costs	Total
Accounting Fees	1,000
CiviCore Organizational Database	500
Utilities	1,250
Insurance	1,000
Total Operating Costs	\$3,750
Indirect Costs (10%)	\$12,989
Total Budget	\$142,874

REVENUE

Source	Amount
The Gordon Charter Foundation	15,000
ELCA Foundation	10,000
Philadelphia Corporation for Aging	55,874
Friends Foundation for the Aging	25,000
Philadelphia Works	5,000
Patricia Kind Family Foundation	5,000
The Leo & Peggy Pierce Family Foundation	5,000
Contributions	22,000
Total	\$142,874

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 subordinates 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 *not*



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