



**MOSES TAYLOR**  
FOUNDATION  
*Advancing Our Legacy of Health*

REDUCING OLDER  
ADULT ISOLATION  
PLANNING GRANT

*Request for Proposals*



## OVERVIEW

As part of Moses Taylor Foundation's strategic initiative to reduce older adult isolation, this grant opportunity will provide *planning* funds to a collaborative of organizations working together to create a community system to address this issue in Lackawanna County. The key outcome of the grant will be a thorough plan for implementation of a coordinated system that includes a shared isolation screening tool, a team of trained navigators to connect isolated older adults to services, and a related public awareness campaign.

## BACKGROUND

### About Moses Taylor Foundation

Moses Taylor Hospital opened October 1, 1892 to treat injured miners and railroaders who were unable to access healthcare at other hospitals in the community. A few years later, the hospital also began treating workers' families and eventually expanded to serve the broader community as well. Moses Taylor Foundation, established in 2012 from the sale of Moses Taylor Health Care System to Community Health Systems of Franklin, Tennessee, is molded in this image of championing the evolving health needs of Northeastern Pennsylvania, prioritizing the most vulnerable. The Foundation's mission, vision and values reflect a commitment to advancing this legacy of health.

## MISSION

The mission of Moses Taylor Foundation is to improve the health of people in Northeastern Pennsylvania.

## VISION

Moses Taylor Foundation is a catalyst in continuing the philanthropic legacy of Moses Taylor by providing opportunities for people in Northeastern Pennsylvania, especially the most vulnerable, to lead healthy lives.

## CORE VALUES

The Foundation embraces these values for itself and the communities it serves:

- Honor the Foundation's history by operating with compassion, respect, and dignity
- Ethics, integrity, and trust
- Stewardship, transparency, and accountability
- Courage, open-mindedness, and diversity
- Informed decision-making and fairness



## Strategic Initiatives

During the Foundation's first years, staff and board sought to lay the groundwork to become a valued community partner, trusted resource, and influential advocate. Awarding \$10 million in funding during the first three years of grantmaking (2015-2018) to 90 organizations, the Foundation demonstrated a willingness to listen, learn, and act on the needs prioritized by partners within the Foundation's core funding priorities: primary healthcare for the economically disadvantaged, mental/behavioral health, dental care, healthcare workforce, and human services that promote good health. Through this work the Foundation came to better understand the community's assets and challenges and the unique roles the Foundation could play to transform the health of people in Northeastern Pennsylvania.

In 2018, the Foundation initiated its first strategic planning process with a commitment to sustaining the work that partners have valued and sharpening focus to achieve greater impact. The resulting 2019-2023 plan was informed by grantees, public sector partners, colleague funders, and other community members. Through this feedback, the Foundation decided to dedicate half its resources over the next five years to continuing its responsive grantmaking, with the other half supporting new strategic initiatives. Recognizing the serious health impacts of isolation and prioritizing older adults as a key population to serve, Moses Taylor Foundation announced "Reducing Social Isolation in Older Adults" as a five-year strategic grantmaking focus for 2019-2023.

## Reducing Older Adult Isolation

Although definitions of social isolation vary, contemporary research frames it as a condition in which an individual may feel a lack of social belonging, an absence of engagement with others, have a minimal amount of social contacts, and/or an inability to develop fulfilling, quality relationships.<sup>I</sup> This definition highlights both the subjective and objective components of isolation. Subjectively, social isolation involves an individuals' personal feelings of loneliness. The objective component considers the measurable frequency and quantity of social connections. While in recent decades the proportion of all American adults identifying as lonely has increased, the greatest risk for isolation is found in older adults. In fact, it is currently estimated that social isolation impacts approximately 17-29 percent of older adults.<sup>II, III, IV</sup>

Beyond the obvious negative effects of a lack of fulfilling relationships, isolation is also a lesser-known, critical social determinant of health, having demonstrated, direct impacts on blood pressure, chronic disease, depression, vulnerability to abuse and neglect, and overall quality of life.<sup>V</sup> Isolation can even elevate the overall risk of mortality among older adults by 29 percent.<sup>VI</sup> Unsurprisingly given this connection to numerous health concerns, social isolation results in \$6.7 billion in additional Medicare spending annually – the same health impact as smoking 15 cigarettes a day, according to the American Association of Retired Persons (AARP) Public Policy Institute.<sup>VII</sup>



### Reducing Older Adult Isolation

Clearly, social isolation is a widespread issue of concern, however, several factors indicate it may especially be of concern in Lackawanna County. First, it is well known that this region has a relatively high proportion of older adults. According to 2017 United States Census data, 19.6 percent of Lackawanna County residents are 65 years of age or older, compared to 17.8 percent of Pennsylvanians and 15.6 percent of the United States population. Additionally, Lackawanna County has a higher incidence of nearly all AARP's risk factors for older adult isolation, compared to nationwide averages. These risk factors include: living alone, having an income below the poverty threshold, being single, and being disabled.<sup>VIII</sup>

In addition to the risk factors defined by AARP, previous scholarship also suggests that opportunities for social engagement decline with health, whether physical or mental. The Institute for Public Policy & Economic Development found that nearly 28 percent of regional adults age 65 and older report limited activity due to physical, mental, or emotional problems, indicating significant barriers to socializing.<sup>IX</sup>

Of course, this data merely indicates the prevalence of risk factors for isolation, rather than a direct measure of isolation itself, illustrating the present difficulty in determining the full extent of isolation. Assessments such as the UCLA Loneliness Scale have been developed to measure subjective isolation (feelings of loneliness). However, in the case of objective isolation (measurable quantity and frequency of interactions and relationships), while some tools exist, there is not significant consensus on a widely validated model or index to be utilized.<sup>X</sup> Despite these challenges in direct measurement, the disproportionately large population of older adults in Lackawanna County, combined with the high levels of known risk factors, suggest a high regional incidence of older adult isolation and the need for targeted action.

As previously noted, Moses Taylor Foundation has identified "Reducing Social Isolation in Older Adults" as a five-year strategic grantmaking focus for 2019-2023. Extensive input from community partners, local data, and a review of current best practices helped the Foundation narrow its focus within this initiative to concentrate on **identification** of socially isolated individuals, **connection** to services, and **awareness**

## A. IDENTIFICATION

Both nationally and locally, identifying older adults who are isolated has been noted as a major challenge to providing services to alleviate isolation. This challenge is exacerbated by many factors, such as stigma and lack of awareness. However, while the challenge of identification has been well-noted, related best practices are still very much in the developmental stage. The concept of utilizing a standard screening tool for social isolation is a logical next step that has been suggested by both local partners and nationally, such as at the 2018 Connectivity Summit of Rural Aging in Portland, Maine. Healthcare providers have been highlighted as a natural fit to regularly administer such a screening; however, social service organizations and other entities that regularly come into contact with older adults could also be viable screening points with the appropriate support.<sup>XI</sup>

As mentioned previously though, while some tools do exist to measure social isolation, there is not yet broad consensus on a single validated measure.<sup>XII</sup> Moses Taylor Foundation sees an opportunity for its partners to review the existing, validated screening tools that examine subjective and objective isolation, consider edits or adjustments, and determine a practical tool that can be effectively implemented by as many local health and social service providers as possible.



## B. CONNECTION

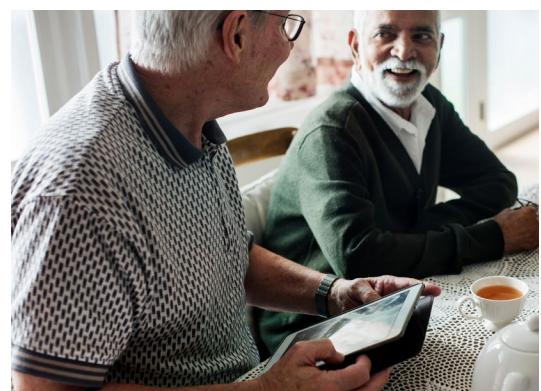
For older adults identified as being isolated or at-risk, Lackawanna County providers indicate that there already are many specialized programs that older adults can take advantage of to reduce their isolation. These programs include friendly visiting services, specialized exercise programs, volunteer placements, and more. However, our partners identified a significant gap in terms of connecting isolated individuals with these existing programs, and assisting them in overcoming barriers to participation. This information was confirmed in a recent needs assessment for the Lackawanna County Area Agency on Aging, which indicated that providers identified a lack of a central referral point with the capacity to assist those seeking services. Correspondingly, older adults surveyed for the same assessment identified lack of information as a key barrier to getting needed assistance. <sup>XIII</sup>



To address this lack of connection between at-risk seniors and existing services, Moses Taylor Foundation envisions a system for addressing older adult isolation that will have at its core a team of trained navigators. These navigators would be responsible for linking older adults identified through screening as isolated with existing community services to reduce their isolation. Since a highly complex set of factors and barriers can play a role in any one person's isolation, it is projected that a more individually tailored approach than a typical information and referral system is necessary. Navigators can provide high touch assistance in terms of connecting participants to programming that fits their specific needs and interests, helping overcome any barriers to participation, and providing encouragement and support. Although current research is limited, similar models using navigation-type approaches to addressing isolation have shown promising initial results. <sup>XIV</sup>

## C. AWARENESS

Raising awareness of social isolation and its health impacts has been identified by local, national, and international entities as a top priority in ongoing efforts to improve the health of older adults. <sup>XV, XVI</sup> This priority acknowledges several factors: the stigma of isolation; lack of awareness about the health imperative for addressing isolation; confusion about how to reduce one's isolation; and a need for efforts to encourage prevention. All of these factors will likely play a role in any effort to implement a system to address social isolation, and therefore, Moses Taylor Foundation feels strongly that a corresponding community awareness campaign will be crucial to expanding the success of the screening and navigation components discussed above.





## PURPOSE

This grant opportunity will provide planning funds to a collaborative of organizations working together to create a community system to address older adult (65+) isolation in Lackawanna County. The key outcome of this grant will be the production of a thorough plan for implementation of a coordinated system that includes:

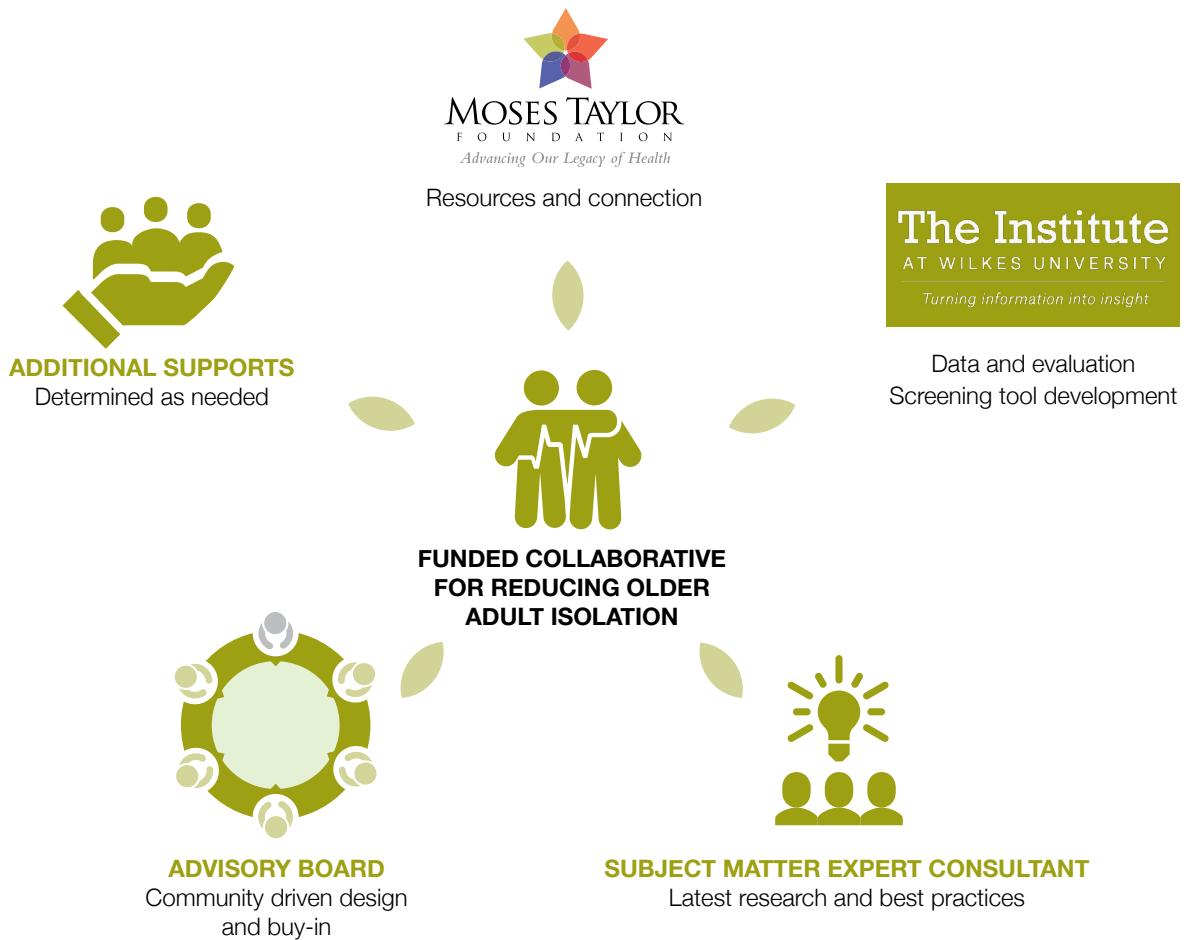
- A shared screening tool to measure isolation, broadly implemented among local health and social service organizations (The Institute for Public Policy and Economic Development will provide substantial support in the development of a screening tool, utilizing existing validated measures as a starting point)
- A team of trained navigators responsible for connecting older adults identified through screening as isolated with existing community services and supports to reduce their isolation; **the goal is for these navigators to serve at least 3,000 clients by the end of 2023**
- A public awareness campaign to reduce stigma, highlight the health impacts of social isolation, and generate additional participation in the screening and navigation system

At the conclusion of the planning period, the chosen collaborative will utilize their developed plan to submit a proposal to Moses Taylor Foundation, and possibly additional funding partners, for implementation funding. While implementation is the eventual goal of this work, receipt of planning funding does not guarantee receipt of implementation funding.

## ELIGIBILITY

Applications will only be accepted on behalf of a collaborative containing one lead organization, and at least one other partner organization. All members of the collaborative must have a 501c3. It is required that each collaborative include at least one nonprofit healthcare provider and one community-based organization with experience serving older adults. Both of these viewpoints will be important in ensuring the development of a system that will be broadly implemented among healthcare and social service providers. Additional collaborative partners may be included if they strengthen the capacity of the collaborative to achieve the desired outcomes. All collaborative members should have a strong presence in Lackawanna County.

# PLANNING GRANT WRAP-AROUND SUPPORTS



## ADDITIONAL PARTNERSHIPS & SUPPORT

Moses Taylor Foundation recognizes that for a successful community system to address older adult isolation, collaboration and partnerships will be key. To that end, the Foundation intends to provide wrap-around support, in addition to funding, to the chosen collaborative during the planning process.

One of these key supports will be through a partnership with The Institute for Public Policy and Economic Development. The Foundation has already contracted with The Institute to provide data and evaluation services to the chosen collaborative. The role of The Institute during the planning process will primarily focus on providing extensive assistance with the development of the isolation screening tool. The Institute will conduct research to advise the collaborative on the screening tools that already exist, parameters for making potential adjustments, and considerations for administering the tool. Additionally, The Institute will support the collaborative in developing evaluation measures and tools during the planning process, and at the implementation stage would be available to provide data collection training and conduct annual assessments of progress. The services of The Institute do NOT need to be included in the budget of the collaborative, as Moses Taylor Foundation is contracting with them directly.

In addition to the services provided by The Institute, the collaborative, in partnership with the Foundation, will be required to convene an advisory board tasked with providing additional knowledge and input to the collaborative during both planning, and potentially implementation. Any costs expected to be associated with meetings of this group (space rental fee, refreshments, etc), should be included in applicants' planning grant budgets. The advisory board is expected to be made up of representatives from additional organizations serving older adults in Lackawanna County and will be key to providing

feedback (not oversight) to assist in shaping a system of screening and navigation that works broadly for a wide array of local health and social services providers. The advisory board is also expected to play a key role in ensuring broad community buy-in to this potential new system.

Finally, Moses Taylor Foundation asks that applicants plan to contract with a consultant that has subject matter expertise in the realm of older adult isolation as part of their planning process and budget. The role of this consultant (who will report to the lead organization of the funded collaborative) will be to advise the group throughout the planning process on best practices and research relevant to design of this new system. Moses Taylor Foundation will be available to assist the collaborative that receives funding in identifying an appropriate consultant and determining his or her scope of work. The estimated cost of the consultant should be included in applicants' proposed planning grant budget.

Throughout the application and planning phase, the collaborative is encouraged to consult with Moses Taylor Foundation if they identify additional supports that they think will be vital to success. Examples of types of support that might be considered include: additional access to expert consultation, support for attendance at related learning opportunities or trainings, purchase of educational materials or memberships, etc.

## **PLANNING GRANT COMPONENTS**

The collaborative of organizations selected to receive planning grant funding will be expected to approach this work with a strong willingness to engage in community-wide collaboration. They should also be prepared to work closely and meet regularly with Foundation staff, The Institute for Public Policy and Economic Development, the advisory board, and the subject matter expert consultant to produce a detailed plan for implementation. Moses Taylor Foundation does not expect that the resulting plan will be a public-facing document, but rather a working document for stakeholders involved in implementation or funding.

Key components of this plan will include:

- Development of a social isolation screening tool in partnership with The Institute for Public Policy and Economic Development
- Logistics for screening, navigation, and public awareness campaign implementation, with a heavy emphasis on a community-wide approach
- Compilation and review of a catalog of current services available to Lackawanna County residents that can reduce older adult isolation. Compiling this catalog will help to identify any gaps in current services and will be utilized by the team of navigators (with continuous updates). A plan for addressing any gaps identified prior to implementation should be considered. Additionally, a plan should be created for continuous monitoring once implementation begins to ensure that existing services are not overwhelmed by new referrals and that they are meeting the needs of participants. It is expected that the community advisory board will play a key supporting role in this process.
- Meaningful engagement of older adults who will be key to informing design of a system tailored to the unique needs of this population
- Creation of evaluation measures and tools in partnership with The Institute for Public Policy and Economic Development
- Long-term sustainability options
- Implementation timeline and budget
- Identification of any additional supports necessary for implementation success





## AWARD AMOUNT

Applying organizations should consider the planning components mentioned above to draft a budget and request the amount of funding they believe to be necessary to fully fund plan development. The Foundation estimates that this will fall within the range of \$50,000 - \$75,000.

## APPLICATION PROCESS

The application process, with key dates, is as follows:

### **July 10, 2019**

#### **RFP Overview Meeting**

Organizations interested in applying for this opportunity are required to attend this meeting, during which the Foundation and The Institute for Public Policy and Economic Development will provide additional details about the planning grant, the vision for implementation, and the application process. Participants will also have the opportunity to ask questions. The meeting will be held from 9 a.m. – 10:30 a.m. at Meals on Wheels of NEPA's The SPACE at Olive (541 Wyoming Avenue, Scranton). Please register for this event by clicking [HERE](#) by July 3, 2019.

### **Prior to Deadline**

#### **Notice of Intent to Apply and Technical Assistance**

Organizations intending to apply for this grant opportunity should email [Christine Marcos](#) (contact information on page 9) with notice of their intent to apply, and the name of their collaborative partner(s), prior to the application deadline.

Applicants are also encouraged to contact Christine with any questions, or for assistance being matched with other interested organizations to form a collaborative.

### **October 1, 2019**

**at 5pm**

#### **Planning Grant Applications Due**

The full planning grant application is available online and accessible by clicking [HERE](#). Each applying collaborative must identify a primary applicant organization to serve as the lead agency and fiscal sponsor. The lead agency should submit one joint application on behalf of the collaborative.

### **November 4-8, 2019**

#### **Site Visits**

Following review of submitted proposals, the Foundation will request individual meetings for all collaboratives receiving further consideration. At least one representative from each member organization of the collaborative should be in attendance, including all key project planning personnel. Moses Taylor Foundation staff and Board members will attend to meet key staff and ask follow-up questions regarding the application.

### **December 9, 2019**

#### **Funding Decision Announced**

### **December 16, 2019-**

#### **Planning Grant Period**

**June 16, 2020**





## A NOTE ABOUT THE PROPOSAL REVIEW PROCESS

Although there has in recent years been a strong emphasis on the importance of reducing older adult isolation, best practices and model programs to successfully address this complex issue are still hard to find. Therefore, the Foundation is undertaking this process in a spirit of learning collaboratively with partners, committing to continuous evaluation and flexibility to course correct as needed, and sharing knowledge gained with others to help move the needle on this issue. This RFP was specifically tailored to acknowledge the challenges of working in a developing field where experience and knowledge is limited. As part of this approach, the Foundation expects that the submission of planning grant applications will act only as a starting point for determining funding. Applicants may be asked to consider adjusting their plans, or to join with partners who were originally part of other collaboratives as the Foundation evaluates interested players and their capacity to undertake different components of this RFP. Please consider whether or not this approach is a fit with your organization and feel free to contact the Foundation with any questions or concerns.

## CONTACT

For questions about this opportunity, please contact:

**Christine Marcos, Program Officer**

**Moses Taylor Foundation**

[cmarcos@mosestaylorfoundation.org](mailto:cmarcos@mosestaylorfoundation.org)

570-207-3731 ext. 304

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