



Cathedral Square

Advancing Healthy Homes, Caring Communities & Positive Aging since 1977

412 Farrell St., Suite 100
South Burlington, VT 05403
CathedralSquare.org

To: Todd Rawlings
From: Miranda Lescaze 
Re: Juniper House at Cambrian Rise: BHTF FY18 Disbursement Request
Date: 2/28/2018

Cathedral Square has made significant progress on the development of Juniper House (at Cambrian Rise) during the time of the BHTF FY18 Grant Agreement. Please consider this report our Closeout Report, as well as our disbursement request for the full FY18 award of \$188,174.

During the period 7/1/17 to 2/26/18, we have made the following progress to advance the Juniper House project:

Funding:

We have secured \$400,000 in Land Bank funding from VHCB to support acquisition of the parcel, Lot 2.

We have submitted funding applications to:

VHFA for LIHTC (April, 2018 decision)

VHCB for Housing Bond and National Housing Trust Fund (invited to be considered at May, 2018 meeting if awarded Tax Credits)

Permits:

We participated in Act250 hearings and neighborhood meetings regarding the Act250 permit. The Act250 permit was issued 1/24/2018 and the appeal period expired 2/24/2018. All local and state permits including Act 250 are now in hand.

Public Hearings:

During the performance period of the BHTF Grant, there were several community meetings CSC participated in to update the public on the project, including Ward 4/7 NPA on 8/23/17; and Ward 2/3 NPA on 9/14/17. Act 250 meetings during this period included a pre-hearing on 7/10/17, and two hearings, one on 9/20/17 and one on 9/25/17. We also attended a neighborhood Cambrian Watch meeting on February 12, 2018.

Design:

We have made significant progress on our plans, and have submitted both a full 70-unit building application and a Phase 1 36-unit building application for tax credits to VHFA, at their suggestions. The plans and specifications are permit sets, substantial enough for permits and funding applications. Once we have a tax credit award (April 2018) we will move forward with a construction set of plans, allowing us to begin construction in September 2018.



We commissioned Doug Kennedy Advisors to complete a project-specific Market Study for Juniper House, corroborating the strong market. "Given the project's orientation toward low/low-moderate income households, we feel that the market prospects are strong.... Our market-based estimates indicate that the project should be 100 percent leased-up within two months of initial occupancy."

Site Control:

The CHT parcel under option with BC Community Housing LLC is subdivided into two lots – Lot 2 for CSC's 70 unit building (Juniper House) and Lot 3 for CHT's 76 unit building (The Laurentide). In October 2017, CSC and CHT entered into an Assignment of Option Agreement for Lot 2, gaining CSC direct site control of Lot 2.

The Option Agreement with BC Community Housing requires exercising the option within one day of the end of the Act250 permit appeal period, or February 25th, 2018. The Option Agreement has been extended to 4/30/18. By 4/30, we will execute a Purchase and Sale Agreement and Development Agreement, and acquire the land (the Development Agreement will survive land acquisition).

To close on the land purchase we will use the FY18 City of Burlington Housing Trust Fund award of \$188,174, and \$400,000 in VHCB Land Bank Funds, to cover the \$700,000 acquisition cost minus the \$192,000 deposit paid to date.

Disbursement Request:

Attached is BC Community Housing/CHT Extension of Option Agreement (to 4/30/18), and CSC's/CHT's Assignment of Option Agreement (for Lot 2). We are in process of extending our Assignment of Option for Lot 2 to mirror the terms of the Extension of Option between BC Community Housing LLC and CHT, and expect it to be in place the first week of March.

We hereby request a disbursement of our award in full, or \$188,174, to support a portion of our land acquisition cost (\$168,458 for reimbursement of \$115,734 of the \$194,708 option payment not covered by the BHTF17 award, plus \$52,724 of the upcoming final acquisition cost); and \$19,716 in permit fees. All expense documentation is attached. We respectfully request this disbursement prior to our land acquisition, which will be prior to 4/30/18 (date not set yet).

Thank you. Please let us know if you need anything further.



COOPERATIVE DEVELOPMENT INSTITUTE

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Jeremiah Ward
Cooperative Development Institute
P.O. Box 1051
Northampton, MA 01061

June 14th, 2018

Todd Rawlings
Housing Program Manager
Community and Economic Development Office
149 Church Street
Room 32, City Hall
Burlington, VT 05401

Greetings Todd,

CDI and North Avenue Co-op is herein requesting a first disbursement in the amount of \$3,605.62 of BHTF grant funds in connection with the Water & Sewer System Design Project. An accounting of these expenses to date along with invoices pertaining the project are attached to this request. Please email me at jward@cdi.coop or call me at 518-569-7863 if you have any questions or would like any more information.

To date, we have substantially completed Phase 1 items #1-4 of the engineer's scope of work submitted with our grant application (attached). Item 5 is still forthcoming as we've added outreach to non-civil utilities (Burlington Telecom, Vermont Gas, and Comcast) to coordinate possible installation of these services into the construction project. Once this additional outreach is complete, we can proceed to phase 2 in earnest. Don't hesitate to call or email me with and questions regarding the status of this project.

CDI and North Avenue Co-op are also herein requesting an extension of the performance period of this grant until December 31 2018.

Please make the reimbursement payable to North Avenue Co-op and send to:

North Avenue Co-op
c/o First Choice Property Management
48 Hamlet Avenue
Woonsocket RI 02895

Sincerely,

Jeremiah Ward

Appendix A – Engineer's Scope of Work

Phase 1

1. Post Co Op Purchase Update - Solicit and collect information from Co Op and CDI on current ownership and maintenance status of the sewer, water, and roadways in the park. This will inform design decisions moving forward.

2. City Jurisdiction Outreach

- a. Correspond with City jurisdictions to
 - i. initially inform and explain the project intent
 - ii. discuss current ownership and O&M responsibilities and if/how these are intended to change with the new project
 - iii. collect and clarify, at the beginning of the project process information about
 - 1. the jurisdictional approval, permitting processes and design involvement
 - 2. technical requirements that will be incorporated into later designs
- b. This includes the following jurisdictions within the City
 - i. DPW Water Resources: Potable Water
 - ii. DPW Water Resources: Wastewater
 - iii. DPW Water Resources: Stormwater
 - iv. Burlington Fire Department

3. State Jurisdiction Outreach

- a. Correspond with State jurisdictions to
 - i. initially inform and explain the project intent
 - ii. collect and clarify, at the beginning of the project process, information about
 - 1. the jurisdictional approval, permitting processes and design involvement
 - 2. technical requirements that will be incorporated into later designs
- b. This includes the following jurisdictions
 - i. DWGPD Regional Office (Wastewater)
 - ii. DWGPD Water Supply Division (Potable Water)
 - iii. Watershed Management Stormwater Section. Discuss operational stormwater requirements as they relate to
 - 1. the existing storm drainage system appurtenances
 - 2. the existing impervious lot coverage boundary "base line", including that as established previously with the City
 - 3. if/how the proposed improvements will trigger their jurisdiction
 - 4. if/how the pending "3 acre" existing impervious rule could affect the improvement design

4. Drainage Site Reconnaissance – Visit the site during/after heavy rains to directly observe and note areas of ponding and poor drainage directly for the purposes of designing grading and drainage improvements that address these drainage problems.

5. Conceptual Design

- a. Develop conceptual, sketch level designs for the water, sewer, road, and drainage improvements for preliminary review and approval by the Co Op and pertinent regulators based on the previously developed EC plan and the input and information gathered from outreach discussed above.
- b. This includes coordination of preliminary input from the Co Op regarding existing and proposed parking areas.
- c. This includes coordination of preliminary input from the Co Op regarding potential project phasing as it relates to the design.

- d. Submit one (1) time to the Co Op and jurisdictional regulators as necessary for preliminary review and comment. Modifications and input will be incorporated into the later, technical design stage.
- e. Collate and report to Co Op on various inputs and reactions to conceptual design in email form.

Phase 2

1. Roadways and Drainage

- a. Improvement Design - Using information obtained during Phase 1 and development of the EC plan, engineer will design a proposed grading and drainage improvement plan for the site, including the roadway structural section and pavement specifications, with the intent of improving existing drainage problems and limiting disturbance outside of the roadway corridors. This plan will include grading improvements, as well as structural catch basin and infiltration-type infrastructure in locations as necessary to achieve positive drainage to the extent possible within existing site parameters, namely in existing roadway corridors. Calculations and modeling to determine stormwater conveyance and storage/ infiltration parameters are included. Test pit logging to determine seasonal high water table levels for infiltration purposes is included.
- b. Improvement Permitting – This scope assumes that no State or City operational stormwater permitting will be required and assumes that runoff will be handled to the extent possible via onsite improvements such as the infiltration catch basins which are existence today. If impervious expansions, operational storm water treatment systems, and/or connections to the City backbone drainage system are sought, then modification to this scope will be required.

2. Wastewater

- a. Improvement Design - Using information obtained during Phase 1 and development of the EC plan, engineer will design a proposed gravity sewage collection system plan for the site, including design details and appurtenance specifications, with the intent of completely replacing the existing sewer collection system with a new gravity system and limiting disturbance outside of the roadway corridors. This design will be based on gravity flow to the existing connection point to the municipal sewer system. Pump station design and/or design to alternate outlet point(s) is not included.
- b. Improvement Permitting – This scope assumes that engineer will need to secure a State WW permit from the Regional Office to permit the proposed sewer collection system.

3. Potable Water

- a. Improvement Design - Using information obtained during Phase 1 and development of the EC plan, engineer will design a proposed potable water distribution system plan for the site, including design details and appurtenance specifications, with the intent of completely replacing the existing potable water distribution system with a new system and limiting disturbance outside of the roadway corridors. This design will be based on municipal water supply from the existing connection point to the municipal water system. Alternate connection point(s) to account for looping will be considered, as will fire protection provisions as determined in Phase 1. Design and siting of individual meter pits is included, as it is assumed that the park will go to individual meters with the completion of this project.
- b. This scope assumes that engineer will need to secure a State Permit to Construct and State WW permit (the latter as mentioned above in "Wastewater") to permit the proposed potable water distribution system.



July 20, 2018

Todd Rawlings
CEDO
149 Church Street
Burlington, Vermont 05401

Dear Todd,

Per your request, this is an update to our previous Capacity Funding Report submitted in April re: the Burlington Housing Trust Fund Capacity Grant award of \$44,781 that we received for FY 2018. Thank you! The City's support of our work through the Trust Fund and its partnership with us on creating and preserving affordable housing in Burlington is critical to our work.

The following updated BHTF Capacity Funding report covers the entire year from July 1, 2017 to June 30, 2018.

Capacity Funding report

The BHTF capacity award supported a significant amount of affordable housing promotion, preservation, education and development activities this year. Our work in FY 2018 includes:

- **Homebuyer Education Workshops, Financial Capabilities and other workshops such as Shared Equity Program information meetings.** From July 1, 2017 – June 30, 2018 a total of 508 households have attended our Home Buyer Education workshop or other workshops offered in Burlington and St Albans by the HomeOwnership Center (HOC) Education program. This number represents 372 households who received group education for homebuyer education. Additionally the HOC provided individual counseling for over 468 households in the home buying process. One shift over the last year has been that one of our signature programs for rental, Ready, Set, Rent! (RSR) changed its format. Historically all RSR clients attended a group Orientation first, then most received group classes for financial capabilities along with individual mentoring. Now RSR clients are triaged into one of two groups. Those with a poor credit history engage in Credit Management Skills which is the 'traditional' RSR format with groups and mentoring. Those with no credit history participate in Introduction to Credit which is comprised of several individual mentoring appointments and no group workshops are required. Thus only 80 households attended the Ready, Set, Rent! Orientation and financial capabilities workshops, but 186 households have received individual mentoring for Ready, Set, Rent!. In addition, the HOC added yet a new program

called On Track to serve CHT rental tenants who are facing eviction due to non-payment of rent; 83 households participated in On Track in this timeframe. Finally, 207 households received information about the Shared Equity Program in a group format in the past 9 months.

- **Transition to Homeownership.** The HomeOwnership Center (HOC) assisted 74 households to successfully purchase a home between July 1, 2017 and June 30, 2018. Additionally, we have been pleased to see that many of our “Ready, Set, Rent!” participants seek out Home Buyer Education once they are firmly settled into their CHT apartment. We have found that CHT tenants who participated in RSR seem about 10 times more likely to come to HBE workshops and counseling. We know anecdotally that several RSR households have successfully purchased homes, although previously we did not have a tracking mechanism in place. We have recently changed databases, and our new system will allow us to better track clients as they move through a variety of programs in the continuum of housing.
- **Former Burlington College land redevelopment now known as Lauretide at Cambrian Rise.** We are moving forward with this collaborative project with the City and Eric Farrell to develop housing of all types on the North Avenue parcel. The predevelopment work including Environmental Review was completed and all local and state permits have been approved. Construction broke ground in May on the 76 affordable residential rental units to be built on the site. We are in negotiation with Eric Farrell about a second building that will include affordable condominiums for sale.
- **322 St. Paul Street expansion of living space.** At the request of the Howard Center leasing 322 St. Paul as a group home, CHT undertook the design, permitting and construction of a new living room and porch addition to better serve the needs of clients, as well as some site work including new fencing. The construction and site work was completed and the Certificate of Occupancy granted in the Fall of 2017.
- **Engaging in planning processes.** CHT staff members have participated in various city discussions in support of more affordable housing in appropriate locations in Burlington as part of the Housing Action Plan, Inclusionary Zoning, and other efforts.
- **Preservation of existing homes and reinvestment to preserve affordability.** Several of our developments are approaching the end of their low income housing tax credit compliance period and need reinvestment to preserve affordability and to pay for much needed rehab work. At Burlington Rental Housing Improvement Project (BHRIP), Pearl Union SRO Housing LP, and ONE Housing we are working on capital and financing plans in order to preserve these existing, affordable rentals. At ONE BRHIP environmental assessments and historic review are in progress. At Pearl Union SRO Housing the rehabilitation project is in the final stages and should be complete in early August.
- **Health and Housing.** With financial assistance from the UVM Medical Center, CHT purchased the Bel-Aire Motel in Burlington and changed the use from a former motel to a multifamily property. After extensive rehabilitation in the Fall of 2018 Bel Aire Apartments started serving the homeless and those in need of a safe

residence with services. Such measures are associated with a reduction in hospital utilization.

CHT stewards over 850 permanently affordable apartments, cooperative homes, condominiums and single-family homes within the City limits. We also manage 80 SROs or apartments in Burlington in collaboration with other social service agencies that provide support for those with special needs. The Trust Fund's capacity funding provides us with important funding in support of our mission to provide these households with stability and security in their housing.

Thank you.

Sincerely,

A handwritten signature in cursive script, appearing to read "Lee Buffinton".

Lee Buffinton
Real Estate Development Administrator
Direct Line: 861-7308



Todd Rawlings
Burlington Housing Trust
Housing Program Manager
City of Burlington Community & Economic Development Office
149 Church Street, Room 32
Burlington, VT
May 17, 2018

Dear Todd,

Attached are copies of the invoices for our construction supervisor and the checks paid to him, totaling over the \$10,000 grant, for fund disbursement.

The Burlington Housing Trust grant is helping to pay a construction supervisor to do two projects in Burlington so far in 2018.

- The first project was at a Green Mountain Habitat home built 2000 660-A North Avenue. The elderly owner was no longer able to climb stairs and needed to sell the home back to us so that another low-income family could purchase it. Renovations were needed including new flooring, bathroom and repairs to the porch and trim. That remodel project has been completed.
- The second and current project is much more involved and is to remodel a small duplex, originally built as a single family home, back into a single family home for a low-income working family of 7 currently living in a 2-bedroom, 1-bathroom apartment. The address of the remodel project is 68 Cottage Grove in Burlington, we began the project in February and we hope to complete it by July.

A whole-house remodel is a large project due to the uncertainty of the existing structure, changes in the building code, etc. In addition, Green Mountain Habitat for Humanity relies on volunteers who are trained and supervised by the construction supervisor. While volunteers take more time than paid construction workers, they help us to keep the cost of the homes we build perpetually affordable for low-income families.

We greatly appreciate the support from the Burlington Housing Trust for the affordable home projects we are doing in Burlington this year and hope to work with the City again.

Sincerely,

David Mullin
Executive Director

Green Mountain Habitat for Humanity Office
300 Cornerstone Drive, Suite 335, Williston, VT 05495 | www.VermontHabitat.org | 802-872-8726

Green Mountain Habitat for Humanity ReStore
528 Essex Rd (Rte 2 A), Williston, VT 05495 | 802-857-5296

BURLINGTON HOUSING TRUST FUND COTS Waystation – Capacity Grant Report

*Submitted by the Committee on Temporary Shelter
June 7, 2018*

In the fall of 2017 the Burlington Housing Trust Fund (BHTF) provided \$7,500 to support our emergency shelter for single adults: COTS Waystation. During the most recently completed state fiscal year (July 1, 2017 to June 30, 2018), the Waystation achieved the following outputs and outcomes during the previous 11 months (July 1, 2017 to May 31, 2018):

- 234 unduplicated individuals received emergency overnight shelter - this is a 13% increase over last year;
- Shelter guests ranged from 18 to 79 years of age (74% Male, 25% Female, 1% Transgender);
- 234 unduplicated individuals received referral for support services through COTS case management and other community services;
- 234 unduplicated individuals received referrals for TB tests and general health screening;
- On average, the Waystation had 34 guests per night (94% utilization rate) which is the same as last year;
- Waystation guests stayed an average of 39 nights compared to 52 nights last year;
- Average individual spent 61** nights over the time period across all stays - this is a 20 decrease compared to last year;
- 57 calendar nights when the shelter was at capacity, 14 calendar nights when the shelter was over capacity, and 21 overflow bednights*.

One item of interest to note and monitor is our data for the women's dorm which provides a total of eight beds compared to 26 beds in the men's dorm. During the previous 11 months our women's dorm had 115 nights at capacity, 18 nights over capacity, and 37 overflow bednights*.

*Overflow bednights are calculated based on how many people were in shelter, rather than where they slept so the number of female overflow bednights can be larger than the total number of overflow bednights when there were one or more women sleeping on a couch/chair, but empty beds in the male dorm.

The Waystation staff work closely with numerous programs within COTS as well as with community partners to help guests get stabilized and return to self-sufficiency. Two staff members share their personal experiences with recent Waystation guests. Their stories illustrate how COTS breaks the fall for people in need and helps them get back on their feet:

- "Thomas" is 61 years of age and has been struggling with drug addiction and homelessness for several decades. Until he recently made a commitment to stay sober he was camping out in the woods. He is now a COTS Waystation guest and has been utilizing both the Waystation and our companion program, COTS Daystation, to ensure he has

shelter during the day and night as well as access to programs and services to help him maintain his sobriety. "Thomas" has been a guest at the Waystation since October of last year and has been coming to the Daystation every single day since that time. In addition to receiving a nutritious lunch and taking part in the programming we provide he has been reading quite a lot and enjoying the peace and comfort the Daystation offers. "Thomas" has been meeting regularly with his COTS Housing Navigator to take the necessary steps to overcome his barriers to securing permanent, sustainable housing. "Thomas" has been making great progress in that regard and is close to achieving his goal.

- "Mark" has a physical disability and had been struggling with homelessness since 2014. "Mark" also grappled with a drug addiction - as he would self-medicate looking to relieve the physical pain from his disability and the stress of being homeless. "Mark" also had a felony conviction before coming to COTS making it even more challenging for him to find affordable, permanent housing. In September of 2017 he made the decision to come to the Waystation and really focus on achieving and maintaining his sobriety and securing housing. "Mark" worked with his COTS Housing Navigator diligently for several weeks and was able to secure permanent housing through Beacon Place in January of this year. Prior to leaving the Waystation for his new home "Mark" shared with a staff member that, "The Waystation staff and guests made me feel accepted and gave me community, they helped me stay sober."

BURLINGTON HOUSING TRUST FUND
COTS Housing Resource Center – Capacity Grant Report

*Submitted by the Committee on Temporary Shelter
June 7, 2018*

In the fall of 2017 the Burlington Housing Trust Fund (BHTF) provided \$7,500 to support COTS homelessness prevention and rapid re-housing program the Housing Resource Center. During the most recently completed state fiscal year (July 1, 2017 to June 30, 2018), COTS Housing Resource Center achieved the following outputs and outcomes during the previous 11 months (July 1, 2017 to May 31, 2018):

- We provided assistance to 333 unduplicated households; 75 percent of approved applicants received prevention assistance while 25 percent received rapid rehousing assistance;
- This affected a total of 745 individuals – including 322 children;
- Of those assisted, 94% remained stably housed 90 days after receiving assistance from the Housing Resource Center and 92% remained stably housed 180 days after receiving assistance;
- Average dollar amount of assist per household: \$1,106 compared with an average assist of \$1,034 per household for the previous year;
- AMI 83% of clients were under 30% AMI, 12% were between 30-50% AMI, 3% 50-60%AMI;
- Every low-income household that sought assistance from the Housing Resource Center was referred to comprehensive housing resources (such as housing search assistance, free credit checks, and assistance with applications for 3SquaresVT and other financial support services);
- We leveraged public money with private money to provide direct services for clients.

During the previous 11 months (July 1, 2017 to May 31, 2018), we dispersed more than \$419,000 (see table below) in financial assistance to stabilize at-risk households residing in public, not-for-profit, and private housing in the greater Burlington area. Our strategy to leverage public money with private funds helps preserve access to housing and scarce housing subsidies in our area.

Organizations (Non-profit and for profit)	Total Households Assisted	Total Amount Paid
BHA	26	\$ 15,352.00
Cathedral Square	8	\$ 3,371.00
CHT	62	\$ 69,874.43
E.P. Management	1	\$ 835.00
Fern Hill	2	\$ 570.00
Keens Crossing	2	\$ 1,818.00
Lund	5	\$ 1,115.00
Northgate Apts.	4	\$ 2,321.00
VSHA	1	\$ 1,192.00
WHA	3	\$ 1,311.00
OTHER-Private	219	\$ 321,745.13
Total	333	\$ 419,504.56

The following stories illustrate how the Housing Resource Center breaks the fall for people in need and helps them get back on their feet:

- “Karen” had lost her job during the winter and it took her over a month to find new employment. While she was looking for a new position her partner also lost his job. Prior to these setbacks they were both earning enough in wages to consistently meet their monthly expenses, but not much more. However, this double stroke of bad luck left them behind on rent by almost two months. They were not eligible to receive any subsidies or assistance from federal or state sources so it would likely take them a very long time, if ever, to get caught up on their rent. “Karen” came to the Housing Resource Center looking for assistance in paying their back rent so they could remain in the home they had shared for several years. We worked with them to analyze their budget and confirmed that they should be okay going forward since they both had found new positions that seemed stable and paid decent wages. Through our prevention funds COTS paid their landlord a portion of the back rent they owed thus allowing them to remain stably housed in their longtime rental unit so they could focus their energies on adjusting to their new jobs.
- “Angela” is a single mother of two children and a small business owner. As the owner of a small local retail store things had always been a little challenging at work and at home, but she had always been able to pay her rent and meet her other monthly obligations. Unfortunately that all changed when she lost the lease on her retail store’s location and was eventually forced to close the business. “Angela” was able to quickly find part-time work as a driver for a local taxi company. “Angela” knew her family would not be sustainable with income from a part-time taxi job and a full-time slot at the taxi company was currently not available. “Angela” came into the HRC to see if we could help her over this “speed bump”. COTS was able to help her with a few months of short-term subsidy assistance while she searched for full-time work. Luckily a full-time driver slot opened up at the taxi company and it was offered to “Angela”. With an increased base wage from her full-time position and additional money coming in from tips her budget is now sustainable.



35 years

July 25, 2018

Todd Rawlings
Housing Program Manager
Community & Economic Development Office
149 Church Street, Room 32
Burlington, VT 05401

Dear Todd,

Please find attached our annual outcomes report showing the benefits received by our matched participants. These results are program wide, but we believe they are representative of Burlington matches as Burlington matches represent about one-third of total matches.

Now that we have all our year end data in, I have also updated our year-end report with Burlington data through June 30, 2018.

Thank you for ongoing support from the Burlington Housing Trust Fund. This grant is critical to our work. Please let me know if you have any questions or need any further information.

Sincerely,


Kirby Dunn
Executive Director

Our mission
is to improve lives
and communities by
bringing Vermonters
together to share homes.

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412 Farrell Street, Suite 300
South Burlington, VT 05403
Phone: (802) 863-5625
HomeShareVermont.org



FY 18 Year-End Report
To the City of Burlington Housing Trust Fund
From HomeShare Vermont

UPDATED July 1, 2017-June 30, 2018

Homesharing helps people stay in their homes while helping others to find affordable housing. The service we provide is one of screening, matchmaking and staying involved for the duration of the “match”. The decision of who to match with is up to the program participants. Our homesharing service is typically for people who would like someone to live in the home to provide companionship, some help with household chores and/or some rental income or help with utilities.

Persons Served

This year to date we worked with a total of 218 Burlington residents. Of these, 64 were looking to share their home (HomeShare Hosts) and 154 were looking for a place to live (HomeShare Guests). Of these we had 30 Burlington Hosts in a match and 35 Burlington guests during the year. Outreach efforts with the Burlington Electric Department resulting in an increase of applications from Burlington Hosts which was our goal.

Rent & Service in Homesharing

In FY 2018, the average rent for all Burlington homesharing matches was \$223/month with 33% of those matches charging no rent at all. In exchange for this reduced rent Burlington Hosts received approximately 7,822 hours of service and \$41,427 of rental income to help make ends meet. Service hours can be anything from yardwork, driving, meal preparation, to dog walking, etc.

CHALLENGES & SUCCESSES

Sharing your home with a stranger is a hard thing to consider doing, especially as you are aging. Encouraging more people to consider sharing their home continues to be one of our greatest challenges. For most people it is not yet a lifestyle choice. However, we are hoping that the boomer generation will be more open to sharing a home as they have had that experience earlier in life and it fits with their social goals and ecological lifestyle. We will continue to focus on our outreach efforts on increasing our pool of Homeshare Hosts.

We have also begun to look at what role we could play in encouraging accessory dwelling units in Burlington as a way to increase affordable housing. We recognize that some people find it difficult to share a home and want more privacy. ADU's can be one way to have someone around to help out a bit while giving folks that extra privacy and security they feel they need. We are working with the Heineberg Senior Community Center and others to put together an educational workshop for Burlington residents next fall on promoting ADU's.

HomeShare Vermont is a leader in the national homesharing movement and as such we have just completed a guidebook for establishing new homesharing programs. This will likely be released in June. We are also working with programs around the country to have a small national conference focused on best practices in October in California and hope to bring the next conference to Burlington in 2019.



2018 Outcomes Survey Results

Goals

The goals of the Outcomes Survey are to assess whether or not matched participants benefited from our programs and, if so, in what ways. We also wanted to identify their degree of satisfaction with our services.

This data was obtained using a results-based accountability (RBA) methodology and seeks to answer the RBA questions of "How Well" and "Is Anyone Better Off."

Our Survey Process

HomeShare Vermont has been conducting outcomes interviews and surveys since 2001 and we have administered 11 surveys with program participants. Surveys were designed with the assistance of Professor Nick Danigelis from the University of Vermont, Department of Sociology, and have remained relatively consistent over the years.

In the past, surveys had been conducted every other year but we transitioned to an annual assessment in 2013.

This is a point-in-time survey and we sought to interview all those who were in a homeshare match as of April 1, 2018. Surveys were conducted in May and June 2018. Homeshare Hosts (individuals who shared their home) were offered in-person, mail, online or phone interviews, while Homeshare Guests (individuals who found housing) chose mostly to respond via mailed or online surveys.

Some survey questions were common to both groups while others were specific to one or the other. Those in a continuing match who already had completed a survey were given the choice of submitting the same results or doing another survey.

The interviewers included staff, board members and volunteers who were trained in interviewing techniques. Surveys were confidential and none of the interviewers were previously associated with the participants with whom they interviewed.

Who Completed the Survey?

As of April 1, 2018, there were 115 participants in active matches. A total of 98 surveys were completed, 54 from hosts and 44 from guests, which yielded an 85% response rate. In several cases, family members completed surveys on behalf of those with memory loss. This was our highest total number of responses – an increase of 10 respondents from last year.

Responses of Those Sharing Their Homes (Homeshare Hosts)

Meeting Original Needs

Those sharing their homes were asked if their current match meets the needs that brought them to HomeShare Vermont. Results are below.

Yes	96%
Somewhat	4%
Not at all	0%

Services Received

Each homesharing exchange is unique, and service and rent vary with each match. Hosts were asked what services they received from their guests. Results are below.

Companionship	56%
"Just in case" presence	52%
Housekeeping	46%
Errands	37%
Yard/Snow Help	37%
Cooking	35%
Pet Care	31%
Driving	24%
Rent Only	19%
Computer Help	11%

Hours of Service per Week

Those sharing their home received an average of 9 hours/week of the services listed above. This average includes those who reported receiving rent only.

Outcomes and Quality of Life Indicators

All persons sharing their homes were asked how homesharing has helped them meet various goals. They had three response options: strongly agree, agree somewhat, or no change due to match. The table on the next page shows the percentage of participants who agreed with each statement (strongly and somewhat agree are combined).

<i>Because of your match.....</i>	Response rate
you feel happier.	81%
you feel safer in your home.	74%
you feel less lonely.	74%
you enjoy your home more.	65%
household chores are completed more regularly.	65%
you eat better.	52%
you worry less about money.	48%
you sleep better.	46%
you feel healthier.	46%
you get out into the community more often.	43%
you have more energy.	35%
you call family less often for help.	33%
you see friends more often.	30%

All of our hosts reported an improvement in at least one quality of life indicator. This is true even for those sharing their homes who were only receiving rent with no expectation of service.

Ability to Stay at Home

All homeshare hosts were asked if they thought they would be able to live in their homes safely and comfortably without a homesharer. Responses are below.

Yes, I could meet my needs myself.	45%
Yes, with the help I receive from family and/or other agencies.	8%
No, not without additional help.	47%

Nearly one-half of hosts reported they would not be able to stay at home without help from HomeShare Vermont. This is notable because our program requires those sharing their homes to be relatively independent as personal/medical care is not provided by a homeshare guest.

Importance of Staying at Home

Participants sharing their homes were asked how important it was to “remain in their home.” Their response options were very important, somewhat important or not important. In total 89% of hosts reported that it was very important to them to remain in their home.

Responses of Those Who Found Housing (Homeshare Guests)

Homeshare guests were asked how homesharing has helped them meet the following goals. They had the option of responding with very much, somewhat, or not at all. Those who responded very much or somewhat are combined.

Homesharing has helped you....	% Response Rate
to obtain affordable housing.	100%
to have more stability.	98%
to live in a safe and supportive environment.	95%
to avoid living alone.	82%

Rent & Savings

Homeshare guests were asked to estimate how much money they were saving each month due to lower housing costs. The results are detailed below.

Money Saved per Month	% of Guests
\$0 to \$199	14%
\$200 to \$399	26%
\$400 to \$599	16%
\$600 to \$799	16%
\$800 or more	28%

Challenges to Finding Housing

Homeshare guests were asked about their personal experience looking for housing prior to being matched by HomeShare Vermont and what challenges they might have faced. Results are below.

Cost of housing	89%
Security deposit expenses	50%
Substandard conditions	25%
Overcrowding	7%
Access to the bus line	7%
Accessibility needs	0%

Satisfaction with Services

Overall Satisfaction with HomeShare Vermont

All participants were asked to think about their experience with all aspects of HomeShare Vermont, ranging from the application and matching process to interactions with staff and volunteers, to determine their overall satisfaction level. Their willingness to recommend our program to friends and relatives is also a reflection of their satisfaction with HomeShare Vermont. The tables below show participants' satisfaction rates and the percentage of participants who would recommend our program to others.

Overall Satisfaction	
Very satisfied	97%
Somewhat satisfied	3%
Not at all satisfied	0%

% who would recommend HomeShare Vermont to friends or relatives
100%

Advice from Participants to Those Considering Homesharing

In an open ended question, all those sharing their homes and those who found housing were asked what advice they would give to someone thinking about homesharing and 81% of respondents took the time to offer advice. The top three responses included:

- 19%: Be patient, open minded, flexible, and/or respectful
- 19%: Communicate clearly, honestly and/or openly
- 16%: Try it

Discussion

We have been collecting outcomes data for 18 years. We have found amazingly consistent results over the years even though every match is so different. The process and the data from outcome surveys has strengthened our services and helped us tell the story of what homesharing is and why it's important. We have learned that because of homesharing, people were eating and sleeping better and feeling healthier and happier! While homeshare hosts are still very independent, our surveys told us that nearly half the hosts feel they would not be able to live safely and comfortably at home without a homeshare guest.

The process of asking participants about their match and our services allows them to feel more a part of the organization and they appreciate being asked for their feedback. The board members and volunteers who conduct the interviews benefit as well by better understanding who we serve and what we do.

Thanks to all our participants, volunteers, staff and board members. We have learned much and are dedicated to continuing to improve our services to help more people stay at home, while helping others find a home they can afford.