

**City of Burlington Housing Trust Fund (HTF)  
Capacity Grant Application**

APPLICANT ORGANIZATION <b>Cathedral Square</b>
CONTACT NAME <b>Cindy Reid</b>
DAYTIME PHONE & E-MAIL <b>Phone: 802.859.8805 Email: reid@cathedralsquare.org</b>
NAME OF PROJECT <b>Cathedral Square Capacity Grant</b>
AMOUNT REQUESTED <b>\$28,000</b>
ESTIMATED CONSTRUCTION START DATE (FOR FEASIBILITY/PREDEVELOPMENT GRANTS) <b>N/A</b>
ESTIMATED COMPLETION DATE <b>9/30/2023</b>
TOTAL ESTIMATED PROJECT COST <b>\$28,000</b>

Is the applicant a 501(c)(3) tax-exempt, nonprofit corporation organized and operated for the purpose of creating or preserving housing for very low, low and moderate income households?

- Yes  
 No

Would the requested grant support the staffing, training, planning, fundraising or on-going operations of a nonprofit corporation, thereby increasing that corporation's capacity to create or preserve housing for very low, low and moderate income households?

- Yes  
 No

Is the applicant a corporation, partnership or individual who is delinquent, at the time of application, in the payment of property taxes or impact fees to the City of Burlington, who have been convicted of arson, who have been convicted of discrimination in the sale or lease of housing under article IV of this chapter or under the fair housing laws of the State of Vermont, or who have pending violations of current city electrical, plumbing, building or housing codes or zoning ordinances?

- Yes  
 No

**Project Narrative**

Funding priority goes to projects which respond to requirements of the Housing Trust Fund and the City of Burlington's affordable housing priorities. The Housing Trust Fund Administrative Committee (HTFAC) uses the attached criteria to score projects. Scores are tallied and ranked high to low. The HTFAC funds projects at its discretion.

Please provide the information below in the space provided. It is important to complete all fields. If you need additional space, attach separate pages to your application and title them as indicated below.

**Project description** (Please briefly describe your project. Specifically describe how Housing Trust Funds would: a) support your organization's ongoing operation and/or b) support the assessment of structural and financial feasibility of new affordable housing.):

The following request for \$28,000 in funding from the Burlington Housing Trust Fund will support the mission and the evolving operations of Cathedral Square (CS) to advance service-enriched housing for low-income older adults and people with disabilities in the Burlington area. Specifically, this request will fund:

- Housing Retention services: to support residents at risk of losing their housing and thereby prevent homelessness.
- DocuSign: to streamline the work processes for our Occupancy and Compliance Management Division, Finance Department and Human Resources, making the process for housing subsidy recertification much easier on both staff and residents.
- KnowledgeWave: to provide comprehensive, user-friendly and easily accessible training options at any time for our staff as we transition to Microsoft 365.
- Anti-Racism work: to provide continued training for staff as well as new educational opportunities for residents.

Housing Retention: CS is committed to supporting residents at risk of losing their housing due to mental health challenges, hoarding, financial instability and other challenges. Like our fellow housing providers, we are finding that an increasing number of our residents fall into this "at risk" category. Two years ago we created a new position dedicated to this effort and created our SHINES program: Success in Housing – Identifying Needs With Enhanced Support. This position has met with success as it helps problem solve and identify resources to help residents retain their housing. Having seen the results, we want to continue to provide this support to our residents. Common areas of focus for the CS SHINE Staff's work with residents include: housekeeping issues (failed inspections), behavioral/mental health concerns, financial struggles causing non-payment, permanent housing transition support and education on the responsibilities of residents. SHINES staff provide housing education, community building, transition support for those formally homeless and while identifying obstacles fosters motivation with the goal of preserving housing and ensuring successful housing in the future. The SHINES staff person works collaboratively with on-site management staff to identify individuals needing interventions and then working with those individuals on a plan to address the challenges at hand and retain their housing. It is a successful Homelessness Prevention initiative.

DocuSign: In order to better serve our residents and further efficiencies for Cathedral Square given the staffing shortages we have experienced over the past few years and continue to experience we would like to invest in an e-signature program called DocuSign. This system will greatly streamline the work processes for our Occupancy and Compliance Management Division, Finance Department and Human Resources.

Our current process for housing subsidy recertification is extremely time-consuming for both staff and our residents- with pages of documents sent in the mail that can easily get lost or damaged. Our plan using DocuSign is to offer in-person assistance for those residents in need (or requesting) such help and acquire final sign-off through links to the documents via email. The percentage of our residents with email accounts has grown over the years as has their comfort in using technology overall. Due to this we believe now is the time to make this transition. Our SASH staff will provide hands on support on the use of DocuSign after being trained by our IT staff. For those residents without email we will continue our current processes and provide encouragement and support around technology advancements.

We believe using DocuSign for internal processes in our Human Resources and Finance divisions will greatly enhance efficiencies as well. Having a streamlined and electronic process for grant agreements, hiring contracts, background check documents, etc. will save staff time and energy to focus on other areas.

KnowledgeWave: During the 2023 fiscal year (10/1/2022-9/30/2023), our organization will transition fully to Microsoft 365 and embrace all the tools and benefits that come with it. In order to ensure we get as much as possible from our investment in MS 365 we would like to invest in KnowledgeWave Learning System (KLS) to provide comprehensive, user-friendly and easily accessible training options at any time for our 185+ staff members. The KLS provides thousands of on-line training videos- from short "bites" that are 3-5 minutes in duration to more lengthy deep dive (90 minutes to 2 hours) videos to meet the needs of a diverse staff with varying levels of technological skill. KLS also provides real time trainings with an instructor on Zoom which are a better option for some staff that need the direct back and forth that an instructor can provide. KLS provides a data dashboard for each staff member that shows trainings completed and suggestions for future trainings based on the specific needs of the organization and the staff position duties. It is a comprehensive and easily tailored on-line training system that will facilitate a smooth and successful transition to MS 365 for our entire staff.

Anti-Racism Training: The CS Anti-Racism committee plans to continue offering training to our staff and add in training and educational opportunities for our residents this year. We would like to continue our relationship with the Peace and Justice Center (or another social justice organization or trainer) to develop and implement sessions virtually and/or in person with our staff and residents- ideally all together. We would like the flexibility to use funds for consulting and/or training services or to cover in-house staff time on these sessions. We currently have one active resident on our Anti-Racism committee who has advocated strongly for us to take some of the successful initiatives we have developed for staff and share with residents. We will work closely with this resident and hopefully other to come up with a goal for the trainings and an implementation plan to engage residents in this important work.

In addition to supporting CS's ongoing operations, the Burlington Housing Trust Fund grant award will support CS's capacity to assess new housing opportunities. CS's proposed activities for this grant award will improve the ways we deliver resident services, improve efficiency of operations, evolve our culture to be antiracist, and enhance our connection to the larger community.

**Please describe how the organization is currently involved in the construction of new affordable housing:**

Bayview Crossing, South Hero

We just completed construction on Bayview Crossing, a new 30-unit housing development for older adults in South Hero. We have worked on this project concept with Champlain Islanders Developing Essential Resources – C.I.D.E.R. for nearly 15 years, and this location for three years. This is a mixed income housing community walkable to the Library, Champlain Islands Health Center, a local bagel café, and to Town services and stores. C.I.D.E.R. is based in the new building, they purchased an new office condominium located in the housing community.

Kelley's Field II, Hinesburg

CS is partnering with Evernorth to develop 24 new housing units for older adults at our Kelley's Field property in Hinesburg. Construction is anticipated to begin in March 2023.

CS continues to build its housing pipeline by exploring other development opportunities and partnership possibilities in the Burlington area and beyond.

**Please describe how the application supports one or more of the priorities listed in the City's Housing Action Plan:**

*I. Expand and strategically apply municipal resources to support new low and moderate income housing construction and better assist those ineligible for subsidy but unable to compete in Burlington's Housing market.*

The BHTF award will strengthen CS's capacity by supporting housing retention services, improve our internal systems and resident services, and providing us training resources to help our organization evolve to become anti-racist.

The BHTF award will bolster CS's housing-retention services, allowing us to provide more and better support to at-risk households. Lacking these services, at-risk residents can lose their housing, which sometimes means losing subsidy, which in turn makes it impossible to compete in the high-cost Burlington housing market.

The award will provide resources for CS to continue the necessary work of becoming antiracist by providing training opportunities for staff and residents. This work will help us better serve all residents in the Burlington community, particularly residents who are marginalized.

This capacity building is essential to help CS continue serving our current and future residents effectively. This also positions CS to more effectively create new, service-enriched housing opportunities for the growing population of low- and moderate-income older adults and people with disabilities, at the same or better level of quality and construction and service delivery.

*IV. New Approaches to Homelessness in Our Community*

CS's housing retention program helps to prevent homelessness by providing needed supports to residents who without those supports, could lose their housing (and thereby lose their subsidy).

*V. Provide Appropriate Housing Options for an Aging Population*

CS's health-and-housing model serves our growing aging population well, with proven positive results. In Burlington CS has seven independent-living communities with services, plus a licensed assisted-living community at Cathedral Square Senior Living (CSSL) on Cherry Street. These affordable housing communities provide SASH services that support aging in place and delay or prevent more costly (and less desirable) institutional care. The combination of affordable housing with SASH promotes wellness and helps people thrive and have a sense of belonging. The programs seeking support in this application (housing retention and antiracism training) all contribute to CS's efforts to successfully house and provide services to a vulnerable population.

**Please describe how the application supports one or more of the priorities listed in the City's Consolidated Plan:**

**SP-25 Priority Needs:**

- Housing Retention - CS provides services to the most vulnerable: older adults, frail and low-income elderly residents, and those at risk of losing their housing, through housing retention services. (DH 3.1)
- Antiracism – in July 2020, the City and 30-plus Chittenden County Organizations (including CS) together declared racism a public health emergency and outlined needed actions to eliminate race-based health disparities and systemic racism in Chittenden County.

**16 Planning & Administration**

This project seeks support for the capacity of Cathedral Square in carrying out the City's goals to serve the most vulnerable and older adults with affordable housing and services

**Please describe the financial need of the requested activity (include a project budget with all sources and uses):**

\$20,000	Housing Retention Services (Total CS Cost is \$60,000; properties support \$20,000 which leaves a gap of \$40,000); we request \$20,000 from BHTF.
\$4,800	Docusign
\$2,200	KnowledgeWave
\$1,000	Staff and Consultant time to provide Anti-Racism Training and Support.
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\$28,000	Total Request

**Please describe the negative impact to the community if the request is not funded:**

Housing Retention Services: this is a critical program we offer to our residents to help avert crises and keep residents safely housed, thus preventing homelessness.

Antiracism Training: without such training, we will not be able to make the structural changes needed to address systemic racism both within our organization and the broader affordable-housing community.

**Please describe how the proposed project supports an underserved and vulnerable population:**

The target population we serve is comprised of low-income older adults and people with disabilities, including people of color and those of non-American ancestry. Both of these initiatives, housing retention and antiracism work, support this underserved population.

- Housing retention work will help keep lower income older adults safely housed and prevent homelessness.
- Antiracism work will enable us to elevate the voices of people of color and ensure that all of our policies, procedures and interactions are more than “inclusive” and “non-discriminatory” – they will be explicitly anti-racist.

**Signature Page**

Please check each box that applies:

- X **Good Standing:** I certify that I am in “good standing” with respect to, or in full compliance with a plan to pay any and all taxes due to the City of Burlington.
- X **Certification:** Under penalties of perjury, I declare that the information I have provided, to the best of my knowledge and belief, is true, correct, and complete.

Cynthia Reid

Print Name

  
Applicant Signature

11/7/2022  
Date

**Management - Organizational Operations Budget  
Cathedral Square Corporation  
Calendar Year Budget 01/1/23-12/31/23**

	<b>Total CSC Calendar Year 2023 Budget</b>
<b>Income</b>	
Management Fees	837,148
Reimbursables	4,675,269
Development Fees	220,000
Grant Income - VHCB Capacity	68,000
Grant Income - BHTF	28,000
Grant Income - HUD Home Modification	203,123
<b>Other Income</b>	
Footcare Income	8,020
Donations	100,000
Int Income	15,041
DRHO Income - CSC as DRHO	20,000
Incentive & Asset Mgmt Fees	15,020
<b>Total Income</b>	<b>6,189,621</b>
<b>Transfers In</b>	
SASH Reserve	
Development Reserves	360,000
<b>Total Transfers In</b>	<b>360,000</b>
<b>Total Income &amp; Transfers</b>	<b>6,549,621</b>
<b>Total Costs &amp; Expenses</b>	<b>-</b>
<b>Surplus (Deficit)</b>	<b>6,549,621</b>
<b>Expenses</b>	
<b>Payroll &amp; Benefit Expenses</b>	
Salaries and Wages	4,280,044
Pension	178,318
Dental	26,298
Health Insurance	951,707
Health Savings Accounts	101,650
Workers Comp Insurance	103,411
Life and Disability Insurance	49,463
Catamount Health Ins	10,113
Employee Appreciation	7,053
Payroll Taxes	330,721
<b>Payroll &amp; Benefit Expense Total</b>	<b>6,038,778</b>
<b>Other Expenses</b>	
Annual Report	1,209
Applicant Screening	1,310
Audit - Financial	22,357
Audit - Pension	7,476
Bank Charges	20,150
Benefit Plan Expense	3,998
Board Expense	302

**Management - Organizational Operations Budget**  
**Cathedral Square Corporation**  
**Calendar Year Budget 01/1/23-12/31/23**

	<b>Total CSC Calendar Year 2023 Budget</b>
Consulting	5,038
Donations & Sponsorships	4,257
Dues & Subscriptions	4,244
EAP & Misc HR	2,358
Footcare Expense	907
Insurance	51,538
Interpreter Expense	2,519
Legal and Professional	5,038
Marketing and Advertising	17,007
Miscellaneous Expenses	504
Nursing Expense UVMHHH	32,760
Payroll Service	25,699
Postage	13,098
Recruiting	40,804
Rent	36,270
Safety Committee	656
Social Committee	13,098
Telephone & Internet	23,173
Temp Staff	7,053
Travel and Training	31,975
Mileage	6,549
Vehicle Expense	2,015
Volunteer Expenses	1,008
Wellness	253
Office Supplies	22,165
Computer Hardware	24,180
IT - Tech Services\Software\Other	51,218
Depreciation	955
<b>Total Other Expenses</b>	<b>483,141</b>
<b>Other Costs</b>	
SASH Support	27,200
<b>Total Other Costs</b>	<b>27,200</b>
<b>Total Expenses</b>	<b>6,549,119</b>
<b>GAAP Net Income/(Loss)</b>	<b>502</b>