

**City of Burlington Housing Trust Fund (HTF)
Project Award Application**

APPLICANT ORGANIZATION
Living Well Group
CONTACT NAME
Amy Perry, Development & Communications Manager
DAYTIME PHONE & E-MAIL
(802) 391-8862 / aperry@livingwellgroup.org
NAME OF PROJECT
Ethan Allen Residence Dining and Nutrition Renovations and Support
AMOUNT REQUESTED
\$19,500
ESTIMATED CONSTRUCTION START DATE
December 2022
ESTIMATED COMPLETION DATE
January 2023
TOTAL ESTIMATED PROJECT COST
\$19,657.98
TOTAL NUMBER OF AFFORDABLE HOUSING UNITS
39
TOTAL ESTIMATED PROJECT COST / TOTAL NUMBER OF AFFORDABLE HOUSING UNITS (PER UNIT COST)
Cost Per Unit: \$505.05

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

Will the proposed housing project be perpetually affordable?

- Yes
 No

Will the proposed housing project be affordable for 10-40 years?

- 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. Attach a project budget including all sources and uses):

Living Well Group is a 501(c)3 nonprofit organization whose mission is to create a model of whole-person elder care that honors, respects and elevates each individual while redefining aging. Licensed by the state of Vermont as a Level III Residential Care Organization, we serve individuals over 60 years of age in our two residential care homes, Ethan Allen Residence in Burlington and Heaton Woods Residence in Montpelier. We are one of just a small handful of facilities that accept residents who are Medicaid eligible.

Ethan Allen Residence currently provides housing for 39 residents, many who are low- and very low-income elders who, without our housing, would likely be in a skilled nursing home or living on the street. Many of our residents require varying levels of assistance with activities of daily living such as transferring, dressing, eating and ensuring proper personal hygiene. Nursing oversight is provided, as well as medication management, 24-hour care supervision, and transportation to appointments. Our resident-focused care promotes wellbeing and an elevated quality of life.

This application seeks funding to help pay for needed renovations, repairs and support to our residents' dining and nutrition program. These projects include installing a new and safer flooring for our residents to help prevent falls and provide easier mobility, a new commercial-sized freezer for the kitchen staff to provide adequate and safe storage of food and allow for more economic purchasing of food, and a new refrigerator with a water filtration system for resident use in the dining area.

Flooring: Estimated Cost of \$14,550

Our dining hall is a large area that allows our residents to gather three times a day for healthy, nutritious meals. While almost every space in our residence is utilized by residents, guests and staff each day, our dining room is the one communal space in the building that is used throughout the entire day. When not being used for meals, the room is utilized for exercise activities, arts and crafts programs, special events and more. This room sees the highest volume of traffic each year from residents, staff, and guests. Despite constant and thorough vacuuming, the current carpeting has become worn, stained and in some areas moldy. Older carpets can see years of accumulated bacteria colonies, chemical irritants and microorganisms like mold regardless of how frequent or thorough cleanings have been. This can run a deeper risk of increased asthma attacks, can weaken immune systems and aggravate allergies.

Many of our residents require walkers or wheelchairs for mobility and a worn floor can provide more risks for falls due to the stability of the flooring and any unevenness or bumps. Replacing with a new high-traffic flooring will help with overall health and safety of our residents.

Commercial freezer: Estimated Cost of \$3,400

We are committed to providing healthy, nutritious meal options to our residents each day to help them maintain healthy lifestyles. As much as possible, we use whole foods from our own resident- and volunteer-tended vegetable gardens in the summer as well as locally-sourced fruits, vegetables and proteins. With food costs increasing and availability of foods not always consistent because of the pandemic, there is a need to find the most economic and available options. This can result in needing to order much of our food in bulk and storing it. Because of this and seasonal availability, the need for a larger commercial freezer has become apparent. Currently, we are utilizing 5-6 old small freezers, which are not all energy efficient. As they break down, we are limited by what we can order and store for

foods. By purchasing a new, larger energy-efficient freezer, we would be able to store foods more adequately and order in a more efficient manner.

Resident refrigerator with water filtration: Estimated Cost of \$1,550

Our residents may occasionally bring home foods from outings or families may bring a treat for the resident. Residents do not have access to refrigerators in their own rooms, so we offer a resident refrigerator/freezer in the dining room for their personal use. Our residents love having this option and it allows for some independence. The current unit in the room has broken, though, and unable to be fixed. Being able to replace with a new unit will bring back that independence and benefit for our residents. Plus, with the easy accessibility of water due to a water filtration system in the door of the new refrigerator, this will encourage our residents' healthy lifestyles and help them stay hydrated.

Please see Attachment A for flooring, freezer and refrigerator estimated project breakdown.

Please describe how many households at or below 80% of AMI will be served by the project:

39 - All of our residents fall below 80% of AMI and will be served by the project.

Please describe how many households at or below 50% of AMI will be served by the project:

39 – all of our residents fall below 50% of AMI and will be served by the project.

Please describe how the City has already demonstrated its interest and support through the investment of CDBG funds, the provision of technical assistance, and/or acquisition of site control for the proposed housing project:

We are appreciative of the past support we have received over the last 8 years from the City of Burlington in helping us to create a safe and healthy environment for some of our vulnerable elderly population. Since FY14, we have received 5 Burlington Housing Trust Fund Project grants and one Capacity grant, plus two CDBG grants. These have helped us repair and renovate our residence to make it more accessible and safer for our residents while maintaining affordability for a vulnerable population. We have added a more energy efficient split a/c and heating unit for the dining communal area, installed an important ADA-compliant elevator to service the building and meet the needs of our residents, and renovated three large accessible bathrooms/shower rooms for residents. We've also replaced windows in our resident rooms and installed new heating in common areas of our residence.

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

The City's Housing Action Plan's goal is to build a more affordable, inclusive, livable, walkable, sustainable, and vibrant community. Assisting Ethan Allen Residence in these renovation goals for the dining communal area will help the City of Burlington achieve this goal and its objective listed in Section 1, Item 1 to "Continue to Prioritize Affordable Housing Preservation."

Ethan Allen Residence provides high-quality, affordable housing for vulnerable seniors with low or very low income, including a majority of our residents who receive Medicaid. We do not ask residents to leave if they need to transition from private pay to Medicaid. The current rate of reimbursement that Ethan Allen Residence receives for Medicaid recipients is about half the actual cost of a resident's care, leaving a substantial gap between the cost of providing care and the actual reimbursement we receive. Funds received through this grant opportunity will provide Living Well Group with the financial resources to continue to support the care of residents who receive Medicaid. Without the support of donations, Ethan Allen Residence would be forced to allocate more rooms to private pay residents in order to pay for needed repairs and improvements.

Transitioning from multiple freezers to a larger, energy efficient commercial freezer also will help the City achieve their goal of increasing energy efficiency as outlined in Section 1, Item 5 to "Improve Home

Energy Efficiency.” Additionally, this upgrade will help reduce our annual operating and maintenance costs for the residence.

Living Well Group’s Ethan Allen Residence also helps the City meet objectives laid out in Section V of the Plan to “Provide Appropriate Housing Options for an Aging Population.” As a Level III Residential Care Facility, Ethan Allen Residence provides a broad range of programs and services to meet the needs of a diverse aging population. We combine housing, high-quality health care and customized services to support our residents’ well-being and independence, including end-of-life care so that residents can age in place in the neighborhood that they call home.

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

The City of Burlington’s Consolidated Plan lists “Decent Housing” as one of the three statutory program purposes. The plan also states that these “priorities benefit extremely low-, low- and moderate-income persons...along with special needs populations.” This first priority area and intended beneficiaries are directly aligned with Living Well Group’s mission to provide affordable housing to low-income older Vermonters, many of whom, are living with a disability. Furthermore, the plan states that “Support for affordable housing allows elders to remain in the homes and neighborhoods they know.” Located in Burlington’s New North End, Ethan Allen Residence has been a vital community resource for decades. Many current residents have lived in this area most of their lives. By supporting a high-quality residential housing facility in the New North End, we are helping to ensure that these residents are not forced to move out of their neighborhood and away from families and support structures.

Our programs and services at Ethan Allen Residence can help address a variety of housing-related challenges that are faced by seniors, including those outlined on page 56 of the Plan. In particular, our housing model helps advance the associated goals of two priority needs:

Priority Need 1 (pg 112): Maintain or Preserve Affordable Housing

The plan states that Burlington’s housing policy is “shaped around the concept of a housing tenure ladder,” and that the “ladder is an affordable housing system that combines security and mobility.” (Pg 103). This idea allows residents to change housing as needs change. Because aging is inevitable, and the presence of a 65+ demographic is a reality, the need to have residential assisted living on the housing ladder is important. Ethan Allen Residence provides this need with decent and affordable housing and a suitable living environment for low and very-low income elder residents. We are allowing them a healthy and safe option without needing to leave the neighborhood that is familiar to them.

As a nonprofit organization, we’ve chosen to prioritize providing affordable housing for residents regardless of financial abilities. Those who come in initially as private-pay residents are transitioned to Medicaid when necessary, despite the fact that Medicaid reimbursement rate only covers half of the actual cost of a resident’s care. This practice of transitioning residents to Medicaid and not asking them to leave is relatively unique to our organization.

Priority Need 10 (pg 116): Protect the Vulnerable (specifically the frail elderly and elderly)

Page 89 of the plan specifies a variety of activities that will be implemented to address the housing and supportive services needs of vulnerable populations that were identified in the plan. Ethan Allen Residence complements these options by providing the next level of care for those vulnerable seniors whose needs can no longer be met by the programs/activities/services outlined in this section, thus allowing these individuals to be safely housed and remain living in their current and familiar community.

Page 104 of the plan states that the city “also supports the provision of public services by local nonprofits to protect the health, safety and well-being of our vulnerable residents.” Our residents at Ethan Allen Residence qualify as a vulnerable population.

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

Every resident at Ethan Allen Residence meets the Level III need for care and the majority are living with some form of dementia or cognitive impairment. Although our residence is not a nursing home, most of our residents also meet the nursing home's high-level of care, meaning that their care is supervised by a physician and administered by a Registered Nurse. More than half of our residents (56%) receive Medicaid, and the remaining percentage are considered low-income.

Ethan Allen Residence is committed to giving at risk elders access to a person-centered approach to health and well-being. We provide a stable, supportive housing environment for vulnerable elders who might be either homeless or in nursing homes with little or no choice as to their community or quality of care.

Please describe the experience of the development team:

Living Well Group's leadership team is organized into functional roles, providing needed oversight of all aspects of this project:

- Shannon Robtoy, Ethan Allen Residence Administrator, will work with staff and contractors on all building improvements. She will oversee all project work, approve project invoices for payment and ensure that the final completed work is consistent with the original specifications and plans and meets any applicable building codes or zoning.
- Beth Hammond, Executive Director, will oversee all aspects of the work being done at Ethan Allen Residence for this project and support the Administrator of Ethan Allen Residence. Beth has extensive experience in management of projects and will oversee the overall bidding process for the project components, as well as the recommendation of qualifying contractors.
- Amy Perry, Development & Communications Manager, handles all grant-related applications, communications, and reporting. Amy has extensive experience in management of grants.
- Lori Montgomery, Director of Finance, and Clare Doyle, Accounting Manager, are our finance team. Their responsibility for this project will be to receive all project funds and oversee all payments of project expenses. They also oversee financial reporting, tracking, invoicing and allocation of costs for the entire organization across multiple locations.
- Jim Holway, President of the Living Well Group Board, has many years experience working with the City of Burlington, including, but not limited to, serving as the Ward 4 Clerk, serving on the Community Development Block Grant Advisory Board, the Housing Board of Review, and the North Avenue Corridor Study Advisory Committee.

Please describe other ancillary uses (community space, mixed use, etc.), if any, in the proposed project:

When we are not experiencing health and safety challenges such as those presented by the COVID-19 pandemic, our doors are always open to the community. Our residents have regular visits from guests and family members. Members of the community will visit to volunteer, conduct exercise or art and music therapies, and stop in to invite a resident to join them for a walk.

We host special enrichment events through the year that are also open to the public, such as holiday parties, music concerts, and art shows. Many of our residents are long-time members of the community and this allows them to continue to have those connections with the community and continue to be part of the neighborhood that is home to them.

Please describe how the project addresses community need:

With about 175,000 Vermonters over the age of 65, Vermont has become the 3rd oldest state in the nation. By 2030, Vermont's senior population is likely to increase by 91,000 individuals, many of whom will reside in Burlington. Although Vermonters are living longer and enjoying better health, the number of people with disabilities or needing assistance with daily care is projected to climb as the population of older adults increases. As this number grows, the long-term care system will be challenged to meet the expanding need and demand for beds will increase.

According to the City's Consolidated Plan, 37% of seniors in Burlington reported having some kind of disability, including mental illness, cognitive issues, and physical impairments or limitations. Page 55 of the CCP states that "Services needed for older adults range from chronic care self-management to prevention, to nursing home level of care in home." Many of these seniors are low-income and in need of long-term care and are unable to secure a spot in an appropriate facility in their chosen location.

Nearly 90 percent of residents living at Ethan Allen Residence are living with some form of dementia or cognitive impairment. In Burlington and Vermont as a whole, the need for high-quality care facilities is of vital importance. The Vermont Chapter of the Alzheimer's Association reports that 13,000 people in Vermont are living with Alzheimer's disease alone, a number expected to rise by 42 percent in the next 6 years. Additionally, more than 25,000 unpaid, informal caregivers (family, friends) bear the burden of caring for them. As Vermont's older adult population rapidly increases, the number of older adults living with degenerative diseases will increase as well. It is incredibly important for Burlington to offer home-like, residential care options for Burlington residents who can no longer live at home, but do not want to leave the beautiful city in which they've called home.

By supporting EAR with a project grant, we can continue to ensure that Burlington's vulnerable population has high-quality options for care once they can no longer live at home.

Please describe how the project would impact the community:

There are approximately 4,500 senior citizens living in Burlington and around 175,000 seniors living the state. Many are very low or low income and who need long-term options in their community. Some are forced to seek care in skilled nursing facilities outside of their chosen community, where their choices and opportunities are limited. Ethan Allen Residence, a Level III Residential Care Facility, has provided safe, enriching, and community-centered residential care for low-income seniors for years in Burlington.

As a non-profit organization, we've chosen to prioritize providing affordable housing for non-private pay residents as a part of our mission. Those who come in initially as private-pay residents are never asked to leave and are able to transition to Medicaid and stay at the residence they now call home. This practice of transition residents to Medicaid and not asking them to leave is relatively unique to our organization. Additionally, our philosophy is to keep our residents through their end of life, when possible, and to provide them and their families with the compassion they deserve during this time.

Funding for this project would help our current and future residents continue to live and age with dignity and ensure that some of our most vulnerable Vermonters have a safe and affordable housing option.

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.

Amy Perry

Print Name



Applicant Signature

11/11/2022

Date

Dining and Nutrition Support Project Budget: Ethan Allen Residence

Descriptions	Cost
Refrigerator with Water Filtration for Residents	
25.6 cu ft Side-by-Side Refrigerator with Ice Maker, Energy Star – by Frigidaire	\$1,499.00
Eastman ¼ in. Compression Inlet and Outlet for Ice Maker	\$17.98
Removal of old refrigerator	\$40.00
Cooler Depot 48 cu ft Frost-free Commercial Freezer	\$3,400.00
Flooring	
Labor and Material to remove base and carpet, install new commercial vinyl and new vinyl base. Dispose of all trash.	\$12,700.00
Sub floor prep to level floor estimate	\$2,000.00
GRAND TOTAL:	\$19,657.98