

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

APPLICANT ORGANIZATION
Awakening Sanctuary, Inc. dba: Living Well Group
CONTACT NAME
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DAYTIME PHONE & E-MAIL
(802) 557-5636; tmartel@livingwellgroup.org
NAME OF PROJECT
Ethan Allen Residence's Dining Hall Heating and Cooling Project
AMOUNT REQUESTED
\$8,010
ESTIMATED CONSTRUCTION START DATE
October 2021
ESTIMATED COMPLETION DATE
October 2021
TOTAL ESTIMATED PROJECT COST
\$8,010
TOTAL NUMBER OF AFFORDABLE HOUSING UNITS
39
TOTAL ESTIMATED PROJECT COST / TOTAL NUMBER OF AFFORDABLE HOUSING UNITS (PER UNIT COST)
CPU: 205

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.

Project Description (Please briefly describe your project. Attach a project budget including all sources and uses):

Incorporated as a 501 c (3) nonprofit in 2004, Living Well Group's mission is to create a model of whole-person elder care that honors, respects, and elevates each individual while redefining aging in America. Licensed by the state of Vermont as a Level III Residential Care Organization, we serve individuals who are 60 years of age or older and we are one of a handful of facilities that accept residents who are Medicaid eligible. We operate two residential care homes, one in Burlington (Ethan Allen Residence) and one in Montpelier (Heaton Woods Residence), serving nearly 100 Vermont seniors and their families.

This application seeks funding to help pay for the installation of a split A/C and heating unit for the dining hall at the Ethan Allen Residence (EAR). Located in Burlington's New North End EAR provides affordable housing for 39 very low- and low-income Vermont seniors who, without our housing, would likely be in a skilled nursing home, at twice the cost to the state, or living on the street. Many of these residents require varying levels of assistance with activities of daily living, including transferring, maintaining continence, dressing, eating, and especially ensuring proper personal hygiene. We provide resident-focused care for the elderly that promotes wellbeing within a wide range of community connections, offering our residents an elevated quality of life compared to other facilities in the area and across our region.

Almost every space in this structure receives substantial use every day by the 39 individuals living there, their guests, and the dozens of staff who provide their care and keep the facility running smoothly. However, the dining hall is the one communal space that is used throughout the entire day. Currently, the space is cooled by two large, inefficient window A/C units and the space is heated by our main heating system. The existing cooling/heating situation has several drawbacks.

- A/C units are not energy efficient or cost-effective. The cost of running both units is approximately 51 cents per hour. The cost of running the new mini split is approximately 36 cents per hour.
- A/C units require annual installation and removal by staff. The A/C units are typically removed in early September and stored for the colder months of the year. If we have unexpected hot days in the shoulder seasons (fall and spring), we must utilize inefficient alternative cooling sources, e.g., fans, to keep residents safe and comfortable.
- The current A/C units are extremely loud. This poses a challenge for those residents that have hearing impairments. It can often mean that they cannot fully participate in the meal-time conversation and therefore do not receive the full social/emotional benefit that our communal meals provide.
- Our dining room has a vaulted ceiling, making the space feel open and airy. This is especially beneficial during mealtimes and when the room is being used for activities such as yoga, sing-alongs, and games like bingo. Unfortunately, the vaulted ceiling makes the space challenging to heat. Although we have several ceiling fans to help push the warm air down towards our residents, the space can often feel cold during the coldest months of winter. An additional heat source to help complement the current heating system would help mitigate this issue.

The installation of a new heating and cooling unit will help increase the building's energy efficiency and improve the safety and comfort of our residents, guests, and staff.

Project Budget: Please see Attachment A. – Ethan Allen Residence's Dining Hall Heating and Cooling Project

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

39 – all our residents fall below 80% AMI.

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

39 – all our residents fall below 50% AMI.

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:

Over the last 7 years, Ethan Allen Residence has received three BHTF grants and two CDBG grants. These grants helped us install a vitally important ADA-compliant elevator and create three large accessible bathrooms/shower rooms for our residents.

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

Assisting EAR with the installation of a new cooling and heating unit will help the City achieve its objective listed in Section I., Item 1. of the City's Housing Action Plan (CHAP): "Continue to Prioritize Affordable Housing Preservation". EAR provides high-quality, affordable housing for vulnerable seniors with very low-or low-AMI, including those who receive Medicaid.

The current rate of reimbursement that EAR receives for Medicaid recipients is about half the rate of area nursing homes, 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 (LWG) with the financial resources to continue to support the care of residents who receive Medicaid. Without the support of donations, EAR would be forced to allocate more of our "beds" to private pay residents in order to pay for these needed capital investments and to meet our financial obligations.

The installation of this mini split unit will help the City achieve their goal of increasing energy efficiency as outlined in Section I., Item 5. of the CHAP: "Improve Home Energy Efficiency". The replacement of the two existing A/C window units will help reduce the overall energy consumption of the building, while increasing the aesthetic appeal, ease of use, and comfort for our residents. Additionally, this energy-efficient upgrade will help reduce our annual operating and maintenance costs for EAR.

LWG's Ethan Allen Residence also helps the City of Burlington meet the objectives summarized in Section V. of the CHAP: "Provide Appropriate Housing Options for an Aging Population". As a Level III Residential Care Facility, EAR has the capability to provide a broad range of programs and services to meet the needs of a diverse aging population. We combine housing, health care and customized services to support our residents' wellbeing and independence, including end-of-life care so that residents can age in place.

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

The City's Consolidated Plan (CCP) lists "decent housing" as one of three statutory program purposes or priorities. Additionally, the Plan states: "These priorities benefit extremely low, low and moderate income persons...along with special need populations." Burlington's first priority area and intended beneficiaries are directly aligned with Ethan Allen Residence's mission to provide affordable housing to low-income older Vermonters, many of whom, are living with a disability. Furthermore, the Plan states: "Support for affordable housing allows elders to remain in the homes and neighborhoods they know." Located in the City's New North End Ethan Allen Residence has been a vital community resource for decades. Many current EAR residents have lived in the 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 their support structures.

The programs and services provided by EAR help the City positively advance in some capacity these two statutory program purposes and address a variety of housing related challenges faced by seniors, as outlined on page 56 of

the CCP. In particular, our housing model helps advance the associated goals of Priority Need 1 and Priority Need 10:

Pg. 112 of the CCP

Priority Need: 1

Priority Need Name: AFH - Maintain or Preserve Affordable Housing

Associated Goal: DH 3.1 Protect the Vulnerable Housing Retention Services

The elderly and frail elderly are listed as target populations for the maintenance or preservation of affordable housing.

Pg. 116 of the CCP

Priority Need: 10

Priority Need Name: Protect the Vulnerable

Associated Goal: DH 1.2 Protect the Vulnerable New Special Need Housing

The elderly and frail elderly are listed as target populations for the protection of vulnerable populations.

Maintain or Preserve Affordable Housing

A BHTF project grant will help preserve affordable housing options at EAR for frail seniors in need of long-term care. On page 72 of the CCP it states that, "It is more cost efficient to invest in the retention of units rather than the construction of units."

On page 103 of the CCP it states that Burlington's Housing Policy is shaped around the concept of a "housing tenure ladder" and lists the various "rungs", e.g., family-sized apartments, detached homes, cooperatives, condominiums, group homes, etc. that can be found on that ladder. Because aging is an inevitability and the presence of a 65+ demographic is a reality for any sizable populace the need to include residential assisted living and long-term care facilities on that housing ladder is critical and should be considered. Ethan Allen Residence provides one of the last "rungs" on the ladder and helps meet two of the CCP's statutory program purposes: decent housing and a suitable living environment for low- and moderate-income persons.

As stated on page 117, "Housing is the essence of Burlington's neighborhoods. Support for affordable housing allows elders to remain in the homes and neighborhoods they know." The next sentence in that paragraph reads, "Homebuyer purchase and rehabilitation programs allow the next generation of residents to own and modernize older homes." We assert that by supporting the provision of a variety of housing choices for seniors, such as long-term care it ultimately "frees up" housing stock for the next generation. When seniors can choose a housing option that is in their preferred community, meets their current and future needs, and is affordable, they move to the next "rung" on the housing ladder rather than remaining in a potentially unsafe situation, thus allowing the generational housing cycle to continue.

Protect the Vulnerable

Page 89 of the CCP 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. EAR complements these options by providing the next level of care for those 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 community.

On page 103 of the CCP it 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." Those individuals residing in EAR certainly 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:

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

- Dennis Fillion, M.Ed., Director of Facilities for EAR: For the past ten years, Dennis has worked directly with staff and contractors on all building improvements. responsible for management of the overall bidding process for the project components, as well as the recommendation of qualifying contractors. He will oversee all project work, approve project invoices for payment and ensure that the final completed work is consistent with original specifications and plans and meets any applicable building codes or zoning.
- Mary Mougey, M.P.A., Director of Operations/Administration for EAR: For the past eight years, Mary has overseen scheduling and the implementation of all building improvements during her tenure, including multiple large-scale bathroom remodels funded by BHTF.
- Lori Montgomery, Director of Finance, and Clare Doyle, Accounting Manager, make up our Finance Team: Receipt of project funds and payment of project expenses are handled by the Finance Team. The Finance Team oversees the financial reporting, tracking, invoicing, and allocation of costs for the entire organization across multiple locations.
- Tamira Martel, Director of Development and Communications: Handles all grant-related applications, communications, and reporting.
- Geoff Lindemer, CPA, Executive Director for LWG: Geoff has been the Executive Director of LWG for the past two years and will oversee all aspects of the above project and related roles and responsibilities.
- Jim Holway, President of the LWG Board: Jim has years of 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. Our residents' guests and members of our community regularly visit our facility to volunteer, conduct exercise or art and music therapies, stop in to invite a resident to join them for a walk, etc. The dining hall also hosts special enrichment events that are open to the public, such as music concerts, art shows, etc.

Please describe how the project addresses community need:

Currently, Vermont has a senior population of 168,999, or 27 percent of the state's total population, making Vermont the 3rd oldest state in the nation. By 2030, Vermont's senior population is likely to increase by 91,000 individuals. Many of those individuals will reside in Burlington. Although Vermonters are living longer and enjoying better health; however, 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. With approximately 3,600 beds statewide the demand for these types of beds far outstrips the supply.

Almost 11 percent (nearly 4,500 individuals) of the 43,000+ people living in Burlington are classified as senior citizens, those aged 65 and older. According to the City's Consolidated Plan (CCP) thirty-seven percent of Burlington seniors (a total of 1,460) reported having some kind of disability, including mental illness, cognitive issues and physical impairments or limitations. Thirty-six percent were living alone and 20.6 percent with an independent living difficulty. 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.

Burlington is not immune to the issues caused by a limited number of Residential Care/Long Term Care beds for low-income, older Vermonters. On page 54 and 55 of the CCP: "Cathedral Square Corporation, a key housing provider serving the elderly and individuals or families with special needs, reports their waiting list hovers between 700 and 1,000 people which demonstrates a high need for special needs/senior housing". This deficiency has created a very strong demand and a high level of unmet need, especially for residents living with degenerative brain disorders or some form of dementia.

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 over 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, over 30,000 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 over 160,000 seniors living in the state as a whole. Many of these seniors are considered very-or low-income and are in need of 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.

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 with the help of our admissions staff, they are able to transition to Medicaid and stay at the residence they now call home. This practice of transitioning 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. Ensuring that some of our most vulnerable citizens have safe, decent, affordable housing positively impacts our collective vitality.

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.

Tamira Martel

Print Name

Tamira Martel

Applicant Signature

08.26.21

Date

Attachment A. – Ethan Allen Residence’s Dining Hall Heating and Cooling Project

Trade	Description	Overall Cost
HVAC	Parts and labor to provide and install: 1-Mitsubishi 36,000 BTU outdoor unit (MUZ-D36NA) 1-Mitsubishi 36,000 BTU indoor wall unit (MSZ-D36NA) 1-Wall bracket for the outdoor unit ---All required refrigerant piping ---All required ducting to cover exposed piping	\$6,810
Electrical	Parts and labor to provide and install: 1-220 Volt, 30 AMP circuit and 20 AMP fuses. ---Coordination of permit for and inspection of the work with the City of Burlington.	\$1,200
Total		\$8,010