

Housing Trust Fund
Project Grant Application

APPLICANT ORGANIZATION Living Well Group
CONTACT NAME Amy Perry, Development & Communications Director
DAYTIME PHONE & E-MAIL (802) 391-8862 / aperry@livingwellgroup.org
NAME OF PROJECT Ethan Allen Residence Skylight Repair Project
AMOUNT REQUESTED \$14,400.00
ESTIMATED CONSTRUCTION START DATE January 2024
ESTIMATED COMPLETION DATE June 2024
TOTAL ESTIMATED PROJECT COST \$14,400.00
TOTAL NUMBER OF AFFORDABLE HOUSING UNITS 39
TOTAL ESTIMATED PROJECT COST / TOTAL NUMBER OF AFFORDABLE HOUSING UNITS (PER UNIT COST) Cost Per Unit: \$369.23 per unit

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 that operates two Level III Residential Care homes in Vermont, Ethan Allen Residence in Burlington and Heaton Woods Residence in Montpelier. Licensed by the State of Vermont, our mission is to create a model of whole-person elder care that honors, respects and elevates each individual while redefining aging. We are dedicated to providing affordable housing to our vulnerable elder Vermonters. As such, 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 of whom 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 also require varying levels of assistance of daily living like dressing, bathing, and ensuring proper personal hygiene. We also offer nursing oversight, medication management, transportation to appointments, and activities that meet physical, mental, emotional and spiritual needs. Living Well Group's mission is to provide resident-focused care that promotes wellbeing in a safe and healthy environment.

In order to ensure this, we must continuously make efforts to maintain, renovate and repair our building. We want our residents to be comfortable and safe as they age in place in a space they call home.

This application seeks funding to help pay for needed renovation of the 6 skylights that we have in the roof of the residential care home. The funding would cover the cost of new skylights, the removal of the old skylights, and the installation of the new skylights. This renovation has become more urgent as we have seen the normal wear and tear of the current skylights grow and cause more issues. There has been a significant increase in leaking around the skylights as once-airtight seals have slowly been failing. This has resulted in the need to place buckets out whenever there is a heavy rainstorm, creating tripping hazards for our residents as well as obstacles for them to navigate with their walkers and wheelchairs. The water leakage, when not caught immediately, is causing other issues to surface, such as damage to the carpeting directly underneath. This can cause areas to become moldy if not taken care of quickly. Mold can play a factor in increased asthma attacks, aggravated allergies and weakened immune systems.

Because there is not an airtight seal around the current skylights anymore, this is resulting in lost heat and larger heating bills. The higher bills are causing a strain and could result in a raise in rates if we can't find alternative solutions. This goes against our dedication to ensuring affordable housing.

The structural integrity of these skylights can also become compromised, such as with heavy snow falls, resulting in a larger damage that could affect the health and safety of our residents.

A benefit to replacing the skylights is that they do provide natural sunlight in the building. Sunlight helps provide natural warmth and can provide a boost to our residents' mental health.

Please see the attached estimate from Champlain Roofing.

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 from the City of Burlington in helping us to create and maintain a safe and healthy environment for our vulnerable elderly population. Since FY14, we have received 6 Burlington Housing Trust Fund Project grants and 2 Capacity grants, plus 2 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. With the help of these grants we have:

1. Added a more energy efficient split a/c and heating unit for the dining communal area,
2. Renovated worn dining room flooring with a new high-traffic, safer flooring to improve accessibility,
3. Replaced freezers with a more energy-efficient commercial freezer,
4. Installed an important ADA-compliant elevator to service the building and meet the needs of our residents,
5. Renovated three large accessible bathrooms/shower rooms for residents,
6. 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 highest overall priority of the City's 2023 Housing Action Plan is affordable housing (AP-55 Affordable Housing), which includes maintaining or preserving affordable housing. On page 37, it is stated that "Support for affordable housing allows elders to remain in the homes and neighborhoods they know." This priority lines up with Living Well Group's goal of providing high-quality care in safe and affordable housing for vulnerable elder Vermonters with low or very low income, many of whom have lived in this neighborhood most of their lives. While they may be unable to live on their own any longer, we want to help them remain in the area they are most familiar with.

A majority of our residents are Medicaid eligible. We do not ask residents to leave if they need to transition from private pay to Medicaid as part of our efforts to help vulnerable elder residents age in place. The current rate of reimbursement that Ethan Allen Residence receives for Medicaid recipients is less than the total actual cost of a resident's care, leaving a substantial gap between the cost of providing care and the actual reimbursement we receive. As a result, it provides a challenge not only fill this gap in funding for care, but to also be able to fund improvements and repairs to ensure a safe building.

Funds received through this grant opportunity will provide Living Well Group with the needed financial resources to help in the maintenance of the building and ensure a safe home for all of our residents. Without the support of donations, Ethan Allen Residence would be forced to find other means of funding, such as allocating more rooms to private pay residents, in order to pay for needed repairs and improvements. This does not meet our mission of providing high-quality care regardless of ability to pay.

The City's priority of a Suitable Living Environment also matches our goals. We are working to create a more energy efficient facility for our residents, improving the building our residents call home, and providing a safe environment where they can age in place, regardless of their income.

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. This first priority area includes "increasing the supply of supportive housing which includes structural features and services to enable persons with special needs...to live in dignity and independence." This special needs population of the city includes seniors over 65 years of age who generally need additional support or wraparound services to allow them to live safely and age in place. (pg 54)

This priority 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 such as limited mobility or memory loss. Regardless of their income level, all our residents receive a high-quality care plan as unique as they each are, allowing them to age in place in a neighborhood they know and love. 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 114): 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 104). 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 a portion 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 119): 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.

We also meet the priority of “a suitable living environment,” which includes the need to increase access to public and private facilities and services, and conserving energy resources. Our efforts to maintain our building and make it more energy efficient will contribute to a better living environment for our 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. A majority 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. She has had previous experience in working with the facilities team and with contractors to ensure improvements are also done with minimal disruption to the daily lives of our residents.
- Wendy Audette, 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. Wendy has experience in management of projects and budget reporting from her previous position as Director of Bayada Hospice. She will oversee overall bidding process for the project components and, as a registered nurse, will ensure the health and safety of our residents.
- Amy Perry, Development & Communications Director, handles all grant-related applications, communications, and reporting. Amy has extensive experience in management of grants and will work with the team to ensure that the work is completed appropriately and following all guidelines.
- 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

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

COVID-19 presented some health and safety challenges which resulted in us needing to restrict community visitors. Within the past year, we have seen these restrictions lifted and our doors are once again open to our community. Residents are now able to 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 or go shopping with them.

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. Currently, there are 3,986 seniors living in Burlington. By 2030, Vermont's senior population is likely to increase by 91,000 individuals, with many residing 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 54 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 4,000 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 can transition to Medicaid and stay at the residence they now call home, a practice that is relatively unique to our organization. Additionally, our philosophy is to keep our residents through their end of life, when possible, and 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

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

____11/15/2023_____
Date



Estimate

Estimate #	3879.1
Date	Nov 14, 2023

Client : Kyle Schail
1200 North Avenue
Burlington, VT 05408

Estimator : Caty Hebert

Schail Skylights

Item	Qty	Unit	Price	Total
Skylights				
Custom Skylight <i>Custom size skylight: remove and replace. These are fixed skylights and do not vent.</i>	6.00	EA	\$2,400.00	\$14,400.00
			Total - Skylights:	\$14,400.00
			Total:	\$14,400.00

Includes:

**Custom skylight prices are estimated only and not a fixed price - they have to be ordered in advance with exact measurements from rooftop - will need to be remeasured in the spring before the install in order to get exact pricing and a more specific timeline for shipping dates.

Thank you for your business!

Caty Hebert

caty@champlainroofing.com