CATHEDRAL SQUARE

2027 - 2029 Strategic Plan

This plan focuses on five areas: operations, real estate development, SASH (Support and Services at Home), fundraising and marketing, and JEDI (justice, equity, diversity, and inclusion). These areas are connected, and each one supports our mission. They build on what we know and do well. They also reflect our belief in fair access to affordable housing and services for people with the greatest needs and lowest incomes. Cathedral Church of St. Paul founded Cathedral Square in 1977 with these values in mind.

Our Mission: Cathedral Square provides beautiful, safe, affordable homes with compassionate care, empowering our communities to live with purpose, dignity, and a sense of belonging.

Our Vision: We envision communities where every person is seen, valued, and respected, where housing is a right, aging is honored, differences are celebrated, and no one faces life's challenges alone.

	OPERATIONS	REAL ESTATE DEVELOPMENT	SASH	FUNDRAISING/MARKETING	JEDI
Statement of Direction	▶ Hire and keep a skilled, diverse team that believes in our mission.	▶ As staffing allows, build new communities and renovate existing ones in ways that serve our mission and support our yearly budget.	▶ Find steady, long-term funding that fully covers traditional SASH, SASH for All, and the Embedded Mental Health Program.	▶ Help more people know our name and mission, so that more people support us and give more.	▶ Build a stronger culture of diversity, equity, inclusion, and belonging for our staff, residents, and SASH participants.
Challenges/ Trends	• Hard to hire and keep staff in today's job market, especially SASH wellness nurses across the state • Meeting the needs of residents who have experienced homelessness • Residents have higher expectations, more mental health and behavior concerns, and more complex care needs • More reporting and more rules to follow • Staff health insurance costs more than we can keep paying	• Building costs keep rising • Not enough funding, with many groups competing for it • Some funders are less willing to pay for projects in Chittenden County, housing for older adults, or repairs to buildings we already own • Each new community needs more funding sources, and each source has its own rules • Pressure to build more housing, even as less rent help (subsidy) is available for residents, and less funding is available for services	• Long-term funding is uncertain • Participants need more support, which takes more staff time • Some partners can't take part because they are short on staff. Others won't because they think SASH repeats what they already do. • We must keep speaking up for SASH and SASH for All so people understand why they matter and the programs can continue	• Many other good causes are already well known to donors • Small staff with limited time • Hard to raise money for day-to-day costs • Fewer donors, though each one gives more	• People understand and value this work in different ways • Limited staff time for this work • Getting people interested in the JEDI committee and events • Turning JEDI plans into everyday practice • Not enough funding for JEDI work • Changes in federal policy and climate

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Strengths	• Staff stay with us a long time • Compassionate, caring culture • Strong employee benefits • Highly skilled employees • Strong finances • 93% of residents who took our survey would recommend us • Clean financial audits, with no problems found • High scores on federal HUD property inspections (REAC) • We keep our properties and services high quality • High demand for our housing and services • 98% of our apartments are filled • Positive partner relationships • Former staff coming back to work for us • Respected by lawmakers, policymakers, and the public • Launched new programs: HIP (Housing Incentive Program), Memory Care at Allen Brook Day Respite, and HANDS in the Kitchen • More volunteers	• Vermont's population is getting older, so demand is growing • Steady demand for affordable housing: our wait list grows every year and now has more than 1,300 people • Leader in energy-efficiency building design • Positive partner relationships • Savings set aside for new building projects • A staff member focused on policy to move our priorities forward • Positive reputation • Offering our service programs (SASH, HIP, SHINES, and Embedded Mental Health) at our properties	• SASH is well known and supported by the Green Mountain Care Board (GMCB), state lawmakers, state government, and our members of Congress • Growing agreement that housing affects health • Outside research and recent studies show SASH costs little and delivers strong results • A statewide system for support, training, data tracking, and quality checks that we can easily build on • Community based and community supported • We adapt to meet community needs (for example, dental clinics) • A data system that is easy to use and works well	• A committed Advancement (fundraising) Committee • Raised $1 million for MCAB two times • A meaningful mission with inspiring stories to share • Past and current board members play a strong role in fundraising • A steady, growing social media presence and good news coverage • Every executive staff member and board member gives • Passion for the work we do • Strong partners, including Charlotte Church, Champlain Valley Union High School (CVU), and Vermont Federal Credit Union • Community Engagement Specialist role • More volunteers taking part • Created our Legacy Community for people who include us in their wills • Created an investment fund and recently added to it • Staff get 4 hours of volunteer time each year to help our communities	• Active JEDI Committee • Commitment from executive leadership • Our staff is more diverse than the average Vermont business • The board approved a strong JEDI plan • Earned "Builder" status in the Long-Term Care Equality Index (LEI) • Leadership completed We Belong training series • All staff had implicit (unconscious) bias training • Started a community connections effort with residents, with mixed results • Took part in the Pride parade every year since 2023 • Rewrote resident materials at an 8th grade reading level

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Areas to Strengthen	• Hiring SASH wellness nurses • Keeping maintenance technicians and resident assistants • Hiring a more diverse staff through focused recruiting • Asset management capacity & system • Using technology and AI where they can save staff time • Better teamwork across departments • Benefits that better fit each employee's needs	• Finding new grant opportunities • Working with more kinds of lenders and investors, including local community banks • Finding ways to grow without overloading staff • Building our own staff expertise in tax credit programs, from development through compliance • Seeking federal HUD funding for housing for older adults (Section 202) and people with disabilities (Section 811) • Better teamwork between Real Estate Development and IT	• Stronger ties with service providers (Area Agencies on Aging and Home Health), hospitals, and Blueprint for Health teams • Steady, long-term funding for all parts of SASH (admin team, traditional SASH, SASH for All, and Embedded Mental Health) • Looking for ways to bring SASH to new places and keep up with changes in health care • Finding ways to lighten staff workloads during the staffing shortage while keeping SASH strong and true to its model	• More people knowing who we are and what we do • More direct contact with supporters • Encouraging people to include us in their wills (legacy giving) • Encouraging board members, staff, and residents to be our ambassadors • Including SASH in fundraising messages and creating a SASH fundraising plan	• Growing the JEDI committee, making it more diverse, and working more closely with the Balance committee • Building JEDI values and priorities into every part of our work • Helping staff make JEDI part of their daily work • Residents and staff feel welcomed, valued, and connected in their communities
Top Priority	• Hire and keep a skilled team.	• Finish building Faywood (Grand Isle) and start building Severance Park (Colchester)	• Find steady funding that fully covers SASH	• Grow the number of supporters and how much they give	• Carry out our JEDI Action Plan to increase inclusion and belonging

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Year 3 (2029) Results	• Pay and benefits stay strong (93% of expenses). Pay rises when the job market calls for it, balanced with benefit costs. • Teams work well together, and departments work together more • 25 people are doing well in HIP • 60% of MCAB Day Respite hours are used • HANDS in the Kitchen is offered at every Cathedral Square community • We fully switched to MRI (property software) and PointClickCare (health records software)	• Faywood is built and renovated (Grand Isle, 24 apartments) • St. Mark is built (Burlington, 30 apartments) • Severance Park is under construction (Colchester, 30 to 35 apartments) • We have a plan to reinvest in the properties we already own	• We work closely with community partners, each with a clear role, to meet participants' needs • Embedded Mental Health is part of half of all SASH panels in Vermont • Nursing time grows from 10 to 20 hours per week for each panel • SASH for All runs in three more regions beyond the two pilot sites • Funding covers the full cost of traditional SASH • A pay-per-service SASH option is created and offered in 2 housing communities • Work with outside researchers to study SASH further, building on past research and our own data, to show the State the model is a good investment	• We raise $150,000 a year in unrestricted gifts (money we can use where it's needed most) • We research and apply to more foundations • The share of donors who give again grows from 48% to 55% • Active donors grow from 90 to 110 • 5 people join our Legacy Community • Cathedral Square is known as an expert on affordable housing, helping older Vermonters age in place, long-term care, and dementia support • We host our 50th anniversary celebration • Outside volunteers grow from 100 to 150 a year • Community events with outside partners grow from 3 to 5 a year	• We build and keep relationships with diverse partners from many fields to help with hiring • Black, Indigenous, and people of color (BIPOC) make up 18% of all staff and 10% of managers (up from 13% and 6% in 2020) • We look for chances to promote and mentor BIPOC employees • We ask BIPOC and LGBTQIA+ employees for feedback through the yearly staff survey and listening sessions with the CEO • We show more diverse residents and staff in all print and digital materials
Year 10 (2037) Impact	• 225 engaged employees who believe in our mission • 1,500 residents, with 95% satisfied • A strong volunteer program with clear onboarding, a steady mix of opportunities, and events to thank volunteers	• 200 more apartments built • Our current properties are in good shape, with no major repairs put off • Up to seven properties change ownership or get new financing: Ruggles House, Town Meadow,	• More SASH panels in Vermont • SASH for All runs in affordable housing across Vermont • SASH or SASH for All runs in 4 states, including Vermont and Rhode Island • Traditional SASH keeps 20 hours of nursing time per week	• Yearly giving holds steady at $225,000 • All current board members and 75% of past board members give and bring in new donors • Active, regular donors return to the 2020 level (225)	• Staff diversity grows from 13% (2020) to 20% • BIPOC staff in non-service roles grow from 5.5% (2020) to 15% • Staff and residents feel included and welcome at

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		Four Winds, McAuley Square, Jeri Hill, GWC 1, and MCAB	• Embedded Mental Health is part of SASH across Vermont • Community partners work well together, creating a stronger system of care for participants	• More than 100 regular volunteers, and 10% of them also donate	Cathedral Square and in our communities