Dear Friends,

2009 has been quite a year! Our dedicated Board of Directors has provided tremendous leadership setting out a new vision for a new decade: healthy homes, caring communities and positive aging!

Our Operations Division—under the extraordinary leadership of Kim Fitzgerald—continues to pursue excellence in resident services; expanding our healthy aging practices; and adopting state of the art systems for the direct benefit of residents.

The remarkable Amy Wright and her development team completed Town Meadow—while juggling a multitude of future projects including the much needed expansion of Grand Way Commons. With the generous blessing of the Cathedral Church of St. Paul and Bishop Thomas Ely, our flagship community was restructured. While at the other end of town, a new multi-generational community began to take shape.

Our Finance Division led by Deb LaChance took on the daunting task of a complete overhaul of our financial software systems while Human Resources Director Kay Jarvis and her team pursue the best supports for the best staff!

Now we prepare for a future of severe budget cuts and a quantum increase in needs. Bold change—redesigning the financing and delivery of health care and services—is essential. Building on Vermont’s strengths, and with the active engagement of our residents, we will be ready to meet the future needs of those we serve.

Nancy Rockett Eldridge
Executive Director
With the help of Heineberg residents, over 20 organizations are designing a new way to help people remain in their homes. This new initiative is called Seniors Aging Safely at Home (SASH). It has been an exciting year with many advances. In July, we kicked off SASH with 59 residents agreeing to help us design the program. We have worked with these residents to identify the areas of need and gaps in service that are prevalent in their Heineberg community. Based on their input, the SASH team, consisting of CSC’s SASH coordinators, wellness nurse and designated staff from VNA, CVAA, PACE, UVM Center on Aging and Fletcher Allen, will be focusing on: reducing falls—educating, and looking for solutions; medication management—check in and reminder systems; healthy living—eating right and exercising individually or as part of a group; chronic health conditions—support systems and coordinating hospital visits; and cognitive and mental health challenges—support for memory loss and depression. Each participant has worked with the team to create their own healthy aging plan, and now all plans are being taken together to form the Heineberg Community Healthy Aging Plan. It is amazing the similarity of needs among residents and the strong support network right at Heineberg! SASH is proving to be more efficient and effective, stretching limited resources. To test this design, SASH will be evaluated in six more locations across Vermont starting in 2010. We are hopeful this will be a national program— we’ll keep you posted!
DO YOU HAVE QUESTIONS?

Lots of Vermonters do. How can I help my parents evaluate assisted living and residential care options? If I sell my home, am I eligible for your housing? Can I keep my dog? Usually the questions are complex—a person’s income affects their housing choices and future health needs require planning ahead. Cathedral Square and HomeShare Vermont joined forces to provide the most up to date information on housing and service options. We cover information on Medicaid and Medicare, VA benefits, questions to ask when seeking housing, web resources, and individual follow up. The response was overwhelming. Participants said: “exceptional presentation,” “very knowledgeable presenters,” “personalized answers.” We are most grateful to the J. Warren and Lois McClure Foundation for making this workshop series possible.

SPEED DATING

That is one of the techniques the American Association of Homes & Services for the Aging (AAHSA) uses to develop the skills of this country’s brightest super stars in aging services. Speed dating is shorthand for intense, brief conversations conducted throughout the AAHSA Leadership Program. CSC was chosen to host the Class of 2009 program: “Sustaining an Ethic of Caring Service.”

AAHSA’s goal is to support and develop emerging leaders who will transform the aging services field, promoting innovation and person centered care. Each of the 30 Fellows were passionate about their work. They reflected on their own leadership styles knowing that there is a direct relationship between self awareness and transformational leadership. Their introspection caused us to reflect, and be encouraged by the caliber of our country’s future leaders.

“TAKING THE GUESSWORK OUT OF MY MEDICATIONS”

Like many seniors, 88 year old Dwight faces the challenge of managing multiple medications daily. He is overwhelmed by the number of prescription medications he regularly takes.

At Cathedral Square, our Wellness Nurses work with residents to develop systems to keep track of daily medications. Finding ways to ensure that residents take the right prescribed medication, in the right doses, at the right time can prevent serious problems and is crucial for the safety of our seniors.

Having the Wellness Nurse make sure that he keeps up with his refills, and monitor his blood pressure and heart rate, is making a positive difference in Dwight’s overall health. He says, “I was not consistent with my medications. What we are doing is helping me, I feel better.”
NEIGHBORHOOD GARDENS AT RUGGLES HOUSE
A true community partnership bloomed at Ruggles House this year. Located in the Hill Section of Burlington, the residents at Ruggles House and the surrounding neighbors on Robinson Parkway, Henderson Terrace and South Prospect created a shared neighborhood garden brimming with herbs, vegetables and flowers. During their first year, residents and neighbors shared in tending the gardens, built three compost bins, planted bulbs and enhanced the overall landscaping by planting new trees and shrubs. Most importantly, residents and neighbors shared the delicious vegetables and herbs throughout the summer and early fall. Gail Thompson, Property Manager and Resident Service Coordinator, says, “This was an amazing project that brought our residents and community neighbors together.”

WHITCOMB WOODS CELEBRATES 30 YEARS
On September 3, 2009, the Whitcomb Woods community room was filled with residents, family members, representatives from our partner organizations, staff and members of the general public to celebrate the 30th Anniversary of Whitcomb Woods. The event featured an art display by the Essex Art League and a craft display by residents. Sergio Torres, a former resident, provided great entertainment for the crowd. More than 100 people attended the event.

A special tribute was made to Florence Lord, a 30 year resident who is 97 (pictured above). Also in attendance were her five sons! Delicious refreshments were provided, many of them made by the residents. A special presentation was made by resident Nancy Wise, who read a letter to the crowd from Senator Patrick Leahy.

TOWN MEADOW GRAND OPENING
When Cathedral Square opens a new community it is cause for celebration. This was particularly true in our newest community, Town Meadow. Over 300 households expressed interest in living in this Essex Town community before the ground was even broken! On June 5, 2009 over 200 community members, families, and partners joined Cathedral Square as we welcomed new residents, thanked our supporters, and celebrated the completion of construction.

Many residents move to Cathedral Square communities from homes that they have lived in for many years. Our building plans for new communities recognize the importance of creating gathering places where people can meet, talk, and watch the world go by. Today when you walk into Town Meadow chances are you will see people gathered around the fireplace, planning an activity or reading the newspaper. Welcome!

VOICE FOR AGING VERMONTERS
2009 was a huge year for bringing voice to older Vermonters. Cathedral Square led the effort to create an association of nonprofit providers serving seniors: the Vermont Aging Collaborative. In its first year VAC’s initial membership includes 34 residential communities. We have a big goal: to create the future for aging in Vermont starting with giving voice to older Vermonters who wish to receive services in their community of choice. VAC is an affiliate of CSC’s national association AAHSA (the American Association of Homes and Services for the Aging). AAHSA is forging the future in aging services technology, building a strong health care work force, creating a long term care insurance option, and protecting Medicare and Medicaid. Please see our website for more information on VAC!
Supportive housing provides on-site property management staff and resident service coordination. In addition, sites may include an activities program to create a sense of community, craft area, wellness nurse visits, transportation, beauty salon, computer room, underground parking, library and a resident manager. Each community is unique and offers a wide variety of activities and programs such as seated yoga, movie nights and field trips.

**OUR HOUSING OPTIONS**

**SUPPORTIVE SENIOR HOUSING**

- **CATHEDRAL SQUARE SENIOR LIVING**
  - Burlington, 80 Homes
- **FOURWINDS**
  - St. Albans, 44 Homes
- **GRAND WAY COMMONS**
  - South Burlington, 63 Homes
- **HEINEBERG SENIOR HOUSING**
  - Burlington, 82 Homes
- **HERITAGE LANE**
  - St. Albans, 28 Homes
- **HOLY CROSS**
  - Colchester, 40 Homes
- **JERI HILL**
  - Jericho, 24 Homes
- **MCAULEY SQUARE SENIOR HOUSING**
  - Burlington, 55 Homes
- **RICHMOND TERRACE**
  - Richmond, 15 Homes
- **TOWN MEADOW**
  - Essex, 48 Homes
- **WHITCOMB WOODS**
  - Essex Junction, 65 Homes
- **WHITNEY HILL HOMESTEAD**
  - Williston, 44 Homes
- **WILLISTON WOODS**
  - Williston, 112 Homes
SHARED HOUSING

Shared housing is a residential setting in which housekeeping and a full meals program is offered. Residents have a private room and private bathroom. All residents share in the use of the dining room, music room, TV room, and sun porch.

OUR HOUSING OPTIONS

INDEPENDENCE PLACE
Burlington, 7 Homes

HARRIS PLACE
Burlington, 6 Homes

MONROE PLACE
Burlington, 16 Homes

SCHOLARS HOUSE
Burlington, 12 Homes

SEMINARY HOUSE
Middlebury, 5 Homes

RUGGLES HOUSE
Burlington, 15 Homes

WHITCOMB TERRACE
Essex Junction, 19 Homes

BARRIER FREE HOUSING

Barrier free housing is designed for individuals with mobility impairments. All units have roll-in showers, adjustable counter tops in the kitchen and a more open design. Whitcomb Terrace provides housing for individuals of all ages and all incomes regardless of disability.

SPECIAL NEEDS HOUSING WITH SUPPORTIVE SERVICES

Communities that Cathedral Square operates in collaboration with are organizations such as the HowardCenter, Lund Family Center, and Counseling Services of Addison County.

HOWARD CENTER COMMUNITIES
Burlington, 20 Homes

INDEPENDENCE PLACE
Burlington, 7 Homes

MONROE PLACE
Burlington, 16 Homes

SCHOLARS HOUSE
Burlington, 12 Homes

SEMINARY HOUSE
Middlebury, 5 Homes

SOUTH BURLINGTON COMMUNITY HOUSING
South Burlington, 10 Homes

AROUND THE CLOCK CARE

The assisted living setting offers licensed care through CSC. Our direct care staff provides personal care, housekeeping, and nursing oversight services to residents. South Burlington Community Housing (SBCH) provides licensed care through the Visiting Nurse Association of Chittenden and Grand Isle Counties for younger individuals with a disability.

ASSISTED LIVING AT CATHEDRAL SQUARE SENIOR LIVING
Burlington, 28 Homes

ASSISTED LIVING AT CATHEDRAL SQUARE
Burlington, 28 Homes

SOUTH BURLINGTON COMMUNITY HOUSING
South Burlington, 10 Homes

HEALTHY HOMES, CARING COMMUNITIES, POSITIVE AGING
Thank you to everyone for supporting our ability to provide seniors and individuals with disabilities a special place to call home.

**OUR SUPPORTERS**

**SPECIAL THANKS FOR EXTRAORDINARY SUPPORT OF OUR MISSION ($1,000 AND HIGHER)**
Matthew and Cecilia Daly
Jeanne Morrissey
Martin Poppe, Jr. and Merryn Rutledge
Jean H. Wright

**COMMUNITY SUPPORTER ($100 to $999)**
Gary Golden and Carol Livingston
David Bogue
Dale and Lois Good
John and Connie Carpenter
Chris and Cheryl Ham-Ellis
Amy Hamlin
Boutin Family Foundation, Inc.
Donald and Jean Harry
Theodore and Joan Braun
Rosalie Hodgkin
Carl F. Buechner
Cornelius and Jeannette Hogan
Vaughn Carney
Gerald and Virginia Hornung
John and Concille Bonvouloir
Kathryn Jarvis
and Mary Crosby
Al and Diane Jette
Carol Bonvouloir
Michael Julow
Janice Clements
Jeff Kantor
Richard and Jean Correia
Patrick and Mary Kearney
Betsy Davis
Dr. Marvin Klikunas
Gerald and Karin Davis
and Karen Cleary
Lauren-Glenn Davitian
Richard and Nancy Lang
Will and Leonora Dodge
Elaine Little
Mark and Nancy Eldridge
Gil Livingston and Amy Wright
The Rt. Rev. Thomas Ely
Ann Livingston
John and Jane Ewing
Betty Miles
Kimberly Fitzgerald
Debby Patterson
Patricia Fontaine
The Very Rev. Kenneth Poppe
Bob Gensburg

**COMMITTEE OF FRIENDS (up to $99)**
David Porteous
Robert Abell
and Vicky Smith
Stephen and Anita Allen
Shelley Richardson
Anonymous
Gloria Bancroft
Nancy R. Baker
Lucille Bunny Beard
Dr. Carol and Rev. David Walters
Peter Bingham
Washington and Alice Winn
Sharon Wright
Thank You!

Francis Bovat
Paul Bruhn
Cleveland H. Dodge Foundation
The Ven. Catherine Cooke
Raymond Cota, CPA
Jeffrey and Frances Crandall
W. D. Daley
Lois D’Arcangelo
John W. Davis
Audrey DeForge
Larry and Marcia Dunham
John and Charlotte Ellenwood
Sam Falzone
Edward and Joan Fitzpatrick
Martin and Patricia Frankie
David and Margaret Gelines
William and Sue Glinka
Nicholas Gotelli and
Maryanne E. Kampmann
Denis and Kate Gravelin
Nancy Hart
Gerald and Nancy Hayes
F. Ward and Irene Hendee
William and Joanne Hennessey
Philip and Joan Hoff
Clem and Sylvia Holden
Don and Mary Ann Horenstein
Jane M. Johnson
Irene Kapusta
Carolyn Kennison
Sandy Kilburn
Kelly Lavallee
Peter Lawlor
Merwin and Donna Lowell
Gordon and Ina MacGregor
William Maclay
Richard and Mary Mansfield
Patricia Markle
Ben and Nan Mason
Mary and Richard McClintock
Sue McCormack
Thomas McGivney
R. J. McKay
Mary McNamara
Ruth and Hugh Moore
Isabel Munnett
Robert and Eleanor Penders
Anthony and Jeanne Pizii
James Rader and Margaret Pond
Robert and Nancy Ransom
Michael and Elizabeth Ray
Jane Ready
Jess River
Rita Robson and
Eli-Anita Norman
Sisters of Mercy—Shalom
Glenn and Marga Sproul
Neil and Marilyn Stout
Charles and Ann Van Royen
Jennifer Wallace-Brodeur
and Bennett Truman
Alexander Zabriskie
Marilyn Zager

GIFTS IN MEMORY OF
Ida Bogue
Percy Carney
Evelyn Cota
Deceased residents of
Three Cathedral Square
Lorraine Emery
Mary E. Frankie
Esther Kearney
Helen Norman
Tom and Jeannette Patterson
Kay Penrose
Elsie Perry
Gwen Shervington
Dorabelle Skeels

GIFTS IN HONOR OF
Thomas W. Abell
Nancy Eldridge
Michelle Lamper
Dr. and Mrs. Lloyd L. Rutledge
60th Jubilarians
Amy Wright

BUSINESS SUPPORT
Backyard Bingo
Bibens Ace Hardware
Bouchard-Pierce
Clean Yield Asset Management
Duncan Wisniewski
Architecture
Green Mountain Power
Home Instead Senior Care
Merchants Bank
New England Floor Covering
Raymond’s As You Like It
Hair Design
Shaw’s Receipt Program
Sovernet Communications
The Tech Group, Inc.
Williston Elder Housing, Inc.

IN-KIND DONATIONS
Deborah Butt
Tobey Clark
Joe Fleming
Mark Gilbert
Green Mountain Coffee Roasters

It is important that our records are accurate. If you find an error, please contact us so we can make the necessary change.

Healthy Homes, Caring Communities, Positive Aging
## CATHEDRAL SQUARE FINANCIALS
### AS OF SEPTEMBER 30, 2009

### ASSETS

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
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</tr>
<tr>
<td>Accounts Receivable</td>
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<tr>
<td>Other Assets</td>
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<tr>
<td>Prepaid &amp; Miscellaneous</td>
<td>$119,549</td>
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<tr>
<td>Notes Receivable</td>
<td>$213,243</td>
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<tr>
<td>Restricted Escrow Accounts</td>
<td>$668,600</td>
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<tr>
<td>Resident Security Deposits</td>
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<tr>
<td>Property, Plant &amp; Equipment, net of depreciation</td>
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</tr>
<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td><strong>$12,001,262</strong></td>
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### LIABILITIES & FUND EQUITY

#### LIABILITIES

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Accounts Payable</td>
<td>$225,729</td>
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<tr>
<td>Other Accrued Liabilities</td>
<td>$397,761</td>
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<tr>
<td>Resident Security Deposits</td>
<td>$171,850</td>
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<tr>
<td>Short Term Debt</td>
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<tr>
<td>Long Term Debt &amp; Accrued Interest</td>
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<tr>
<td><strong>TOTAL LIABILITIES</strong></td>
<td><strong>$10,478,782</strong></td>
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#### FUND EQUITY

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
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</thead>
<tbody>
<tr>
<td>Fund Balance – Unrestricted</td>
<td>$(1,173,700)</td>
</tr>
<tr>
<td>Fund Balance – Temporarily Restricted</td>
<td>$2,696,180</td>
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<tr>
<td><strong>TOTAL FUND EQUITY</strong></td>
<td><strong>$1,522,480</strong></td>
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<tr>
<td><strong>TOTAL LIABILITIES &amp; FUND EQUITY</strong></td>
<td><strong>$12,001,262</strong></td>
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</tbody>
</table>

### ASSETS MANAGED

<table>
<thead>
<tr>
<th>Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equity Interest</td>
<td>34%</td>
</tr>
<tr>
<td>Managed Contracts</td>
<td>24%</td>
</tr>
<tr>
<td>Related Entity</td>
<td>22%</td>
</tr>
<tr>
<td>CSC Ownership</td>
<td>20%</td>
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<tr>
<td><strong>TOTAL ASSETS MANAGED</strong></td>
<td><strong>$61,491,678</strong></td>
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### BUDGETS MANAGED

<table>
<thead>
<tr>
<th>Type</th>
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</thead>
<tbody>
<tr>
<td>CSC Ownership</td>
<td>35%</td>
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<tr>
<td>Equity Interest</td>
<td>24%</td>
</tr>
<tr>
<td>Managed Contracts</td>
<td>16%</td>
</tr>
<tr>
<td>Related Entity</td>
<td>11%</td>
</tr>
<tr>
<td>Programs &amp; Development</td>
<td>9%</td>
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<tr>
<td>Corporate</td>
<td>5%</td>
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<tr>
<td><strong>TOTAL BUDGETS MANAGED</strong></td>
<td><strong>$9,470,541</strong></td>
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</table>

### REVENUES

<table>
<thead>
<tr>
<th>Description</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>Rental Income</td>
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<tr>
<td>Reimbursable Salaries</td>
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<tr>
<td>Client Fees &amp; Other Income</td>
<td>14%</td>
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<tr>
<td>Development Fees</td>
<td>11%</td>
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<tr>
<td>Government Assistance</td>
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<tr>
<td>Management Fees</td>
<td>8%</td>
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<tr>
<td>Contributions</td>
<td>2%</td>
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<tr>
<td><strong>TOTAL REVENUES</strong></td>
<td><strong>$6,065,523</strong></td>
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### EXPENSES

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<tr>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>Service Enriched Housing</td>
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<tr>
<td>• Operational Expense</td>
<td>54%</td>
</tr>
<tr>
<td>• Depreciation</td>
<td>6%</td>
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<tr>
<td>• Deferred Interest</td>
<td>4%</td>
</tr>
<tr>
<td>Corporate, Programs &amp; Development</td>
<td>22%</td>
</tr>
<tr>
<td>Assisted Living</td>
<td>14%</td>
</tr>
<tr>
<td><strong>TOTAL EXPENSES</strong></td>
<td><strong>$6,163,047</strong></td>
</tr>
</tbody>
</table>
We would like to acknowledge our incredible team of employees for their dedication to our residents and our mission throughout the year.

This list includes employees who have worked for CSC from 10/1/08 – 9/30/09.
Healthy Homes, Caring Communities, Positive Aging

www.cathedralsquare.org

CSC is a non-profit equal opportunity employer and housing provider

For more information, please contact us at:

PHONE 802-863-2224
FAX 802-863-6661
info@cathedralsquare.org

CATHEDRAL SQUARE
412 Farrell Street, Suite 100
South Burlington, Vermont 05403