



# ANNUAL REPORT

OCTOBER 1, 2008 – SEPTEMBER 30, 2009

HEALTHY  
HOMES  
CARING COMMUNITIES  
POSITIVE AGING

## BOARD OF DIRECTORS

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## EDITOR

Kay Jarvis

## PHOTOS

CSC Staff,  
Carolyn Bates

## DESIGN

Futura Design



*Healthy Homes, Caring Communities, Positive Aging*

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.

A handwritten signature in black ink, appearing to read "Nancy Rockett Eldridge".

Nancy Rockett Eldridge  
Executive Director



*A special thanks to the Vermont Health Foundation for their leadership on SASH.*

# Seniors Aging Safely at Home

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—supports 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!

*Below, SASH participant, Katie, joins the walking program*



*Right, SASH Coordinator Ken Bridges and SASH participant Mary, participating in a walking program*



*SASH participants, Molly Dugan, Maggie Holmes and Jenn Allen*



## HEALTHY HOMES, CARING COMMUNITIES, POSITIVE AGING



### 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!



Vermont Aging  
Collaborative

### 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!

# OUR HOUSING OPTIONS

## SUPPORTIVE SENIOR HOUSING

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.



**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

# OUR HOUSING OPTIONS

## 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.



**HOWARDCENTER COMMUNITIES**  
Burlington, 20 Homes



**INDEPENDENCE PLACE**  
Burlington, 7 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



**ASSISTED LIVING AT CATHEDRAL SQUARE SENIOR LIVING**  
Burlington, 28 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.

## 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.

## 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.

# OUR SUPPORTERS

*Thank you to everyone for supporting our ability to provide seniors and individuals with disabilities a special place to call home.*

## **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)**

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

David Porteous  
and Vicky Smith  
Shelley Richardson  
Patrick Robins and  
Lisa Schamberg  
John and Alice Rouleau  
Nadine Scibek, Esq.  
Charles Smith  
Charles and Edith Templin  
Ron and Jan Van Mynen  
Bruce and Lillian Venner  
Dr. Carol and Rev. David Walters  
Washington and Alice Winn  
Sharon Wright

## **COMMUNITY OF FRIENDS (up to \$99)**

Robert Abell  
Stephen and Anita Allen  
Anonymous  
Nancy R. Baker  
Gloria Bancroft  
Lucille Bunny Beard  
Peter Bingham

*Donations received between  
October 1, 2008 – December 31,  
2009.*







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  
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 Edward and Joan Fitzpatrick  
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 Nicholas Gotelli and  
 Maryanne E. Kampmann  
 Denis and Kate Gravelin  
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 Gerald and Nancy Hayes  
 F. Ward and Irene Hendee  
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 Peter Lawlor  
 Merwin and Donna Lowell  
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 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  
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 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.*

# FINANCIALS

## CATHEDRAL SQUARE FINANCIALS AS OF SEPTEMBER 30, 2009

### ASSETS

Cash	\$ 744,405
Accounts Receivable	\$ 772,339
Other Assets	\$ 229,890
Prepaid & Miscellaneous	\$ 119,549
Notes Receivable	\$ 213,243
Restricted Escrow Accounts	\$ 668,600
Resident Security Deposits	\$ 171,727
Property, Plant & Equipment, net of depreciation	\$ 9,081,509
<b>TOTAL ASSETS</b>	<b>\$ 12,001,262</b>

### LIABILITIES & FUND EQUITY

#### LIABILITIES

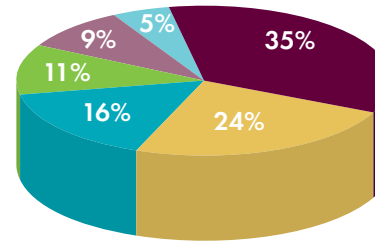
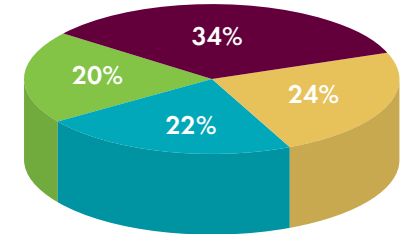
Accounts Payable	\$ 225,729
Other Accrued Liabilities	\$ 397,761
Resident Security Deposits	\$ 171,850
Short Term Debt	\$ 22,275
Long Term Debt & Accrued Interest	\$ 9,661,167
<b>TOTAL LIABILITIES</b>	<b>\$ 10,478,782</b>

#### FUND EQUITY

Fund Balance - Unrestricted	\$(1,173,700)
Fund Balance - Temporarily Restricted	\$ 2,696,180
<b>TOTAL FUND EQUITY</b>	<b>\$ 1,522,480</b>
<b>TOTAL LIABILITIES &amp; FUND EQUITY</b>	<b>\$ 12,001,262</b>

### ASSETS MANAGED \$61,491,678

Equity Interest	34%
Managed Contracts	24%
Related Entity	22%
CSC Ownership	20%



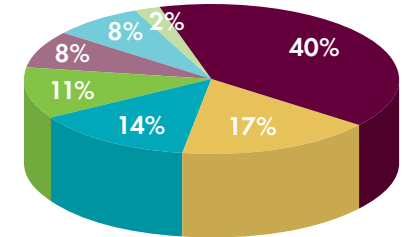
### BUDGETS MANAGED \$9,470,541

CSC Ownership	35%
Equity Interest	24%
Managed Contracts	16%
Related Entity	11%
Programs & Development	9%
Corporate	5%

### REVENUES

\$6,065,523

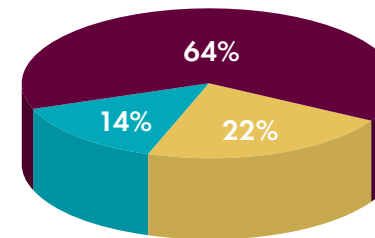
Rental Income	40%
Reimbursable Salaries	17%
Client Fees & Other Income	14%
Development Fees	11%
Government Assistance	8%
Management Fees	8%
Contributions	2%



### EXPENSES

\$6,163,047

Service Enriched Housing	64%
• Operational Expense	54%
• Depreciation	6%
• Deferred Interest	4%
Corporate, Programs & Development	22%
Assisted Living	14%



*We would like to acknowledge our incredible team of employees for their dedication to our residents and our mission throughout the year.*

# OUR TEAM

Allen, Jennifer  
 Ashe, Timothy  
 Askren, Laurel  
 Audette, Jaime  
 Bardeleben, Edward  
 Baric, Damir  
 Bartlett, Lawrence  
 Beerworth, Anna  
 Bounsana, Asnat  
 Bridges, Kenneth  
 Brooks, Mary  
 Bunnell, Ashley  
 Burghardt, Cathy  
 Chabot, Sabine  
 Cherry, Marcella  
 Chiasson, Linda  
 Chicoine, Paul  
 Chodon, Tsering  
 Choedon, Tenzin  
 Cornelius, William  
 Cosabic, Armin  
 Crowley, Mary  
 Demers, Raymond  
 Derry, Justin  
 Dolma, Migmar

Dolma, Passang  
 Douglas, Deborah  
 Dugan, Molly  
 Eaton, Todd  
 Eldridge, Nancy  
 Ellicock, Eric  
 Ewing, Carmel  
 Finney, Bruce  
 Fitzgerald, Kim  
 Fitzgerald, Stephanie  
 Fitzpatrick, Paula  
 Forleo, Kathryn  
 Fountain, Jennifer  
 Fowler, Thomas  
 Gacetta, Donna  
 Geygong, Sonam  
 Geygong, Tenzin  
 Gicheru, Philomena  
 Graeme, Donna  
 Grinnell, John  
 Groseclose, Carl  
 Guyre, Roseanne  
 Hartsfield, Stefani  
 Hunter, Jennifer  
 Husrefovic, Aida

Ibrahim, Abdullahia  
 Irish, Erika  
 Irish, Irene  
 Jackobeit, Maria  
 Jaquith Sr., Peter  
 Jarvis, Kathryn  
 Joy, Richard  
 Kalsang, Kalsang  
 King, Angel  
 King, John  
 Kolibas, Catherine  
 Kutler, Susan  
 LaBate, Heidi  
 LaChance, Debra  
 LaClair, Cindy  
 LaFrance, Cindy  
 LeClair, Brenda  
 Long, Grace  
 Lubula, Ponga  
 Lucia, Michael  
 Luhrs, Erik  
 Lumumba, Marie  
 Lynn, Mary  
 Lyon, Kristine  
 MacDonald, Lise

Manley, Joi  
 Mariani, Sarah  
 Markle, Patricia  
 McSweeney, Linda  
 Miller, Douglas  
 Nolan, Samuel  
 Ondis, Sifforah  
 Paul, Christopher  
 Pelzom, Jampa  
 Perry, John  
 Pond, Betsy  
 Poro, Nathan  
 Rath, William  
 Richardson, Marilyn  
 Rocque, James  
 Rose, Cheryl  
 Russell, Scott  
 Sanchez, Barbara  
 Sanville, Richard  
 Sempe, Cristina  
 Shakespeare, Kirtis  
 Shepard, Lynette  
 Sinchak, Carol  
 Sperling, Zachary  
 Still, Jennifer

Sutor Smith, Linda  
 Taylor, Jesse  
 Terry, Timothy  
 Thibault, Kayla  
 Thompson, Gail  
 Valentine, Marisa  
 Valyou, David  
 Vance, Christina  
 Veilleux, Matthew  
 Weeks, Hillary  
 Whitcomb, James  
 Whitney, Susan  
 Willett, Krista  
 Williamson, Sherry  
 Wilson, Laura  
 Wires, David  
 Wright, Amy  
 Yates, Tina

*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](http://www.cathedralsquare.org)



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

For more information, please contact us at:

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