

2017 ANNUAL REPORT



Cathedral
Square

Advancing Healthy Homes,
Caring Communities & Positive
Aging since 1977



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Effective January 2018

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DEAR FRIENDS,

What a year 2017 has been! Little did we know at the start of the year that we would open the doors to the state's first affordable residence for Vermonters with dementia — a longtime dream of ours, for which there is such great need. But when the opportunity suddenly presented itself — when the former VNA Respite House in Williston came up for sale — we pulled out all the stops and seized it, determined to make our dream a reality.

With the help of some very generous people and foundations, the state of Vermont and our own dogged determination, we secured the necessary approvals and raised the required funds in a few hectic months. We closed on the property in mid-September. That very day, within an hour of closing, a crew of enthusiastic staff volunteers began helping with renovations. Just three months later, substantial renovations were completed and we welcomed our first resident.

2017 also marked the 40th anniversary of Cathedral Square. We celebrated the milestone in September, marking it with a lengthy feature in the "History Space" section of the Sept. 10 *Burlington Free Press*, a special video highlighting our residents and our work, a new logo and, most important, a fundraising campaign for our promising foray into memory care. We are especially grateful to Mutual of America, our lead anniversary sponsor.

The year gave us other reasons to celebrate as well. We opened our newest residence, Elm Place in Milton, which went on to win several national and regional awards for energy efficiency. We replicated SASH® (Support and Services at Home) in Rhode Island, at Saint Elizabeth Community. We started a mental-health pilot embedded in two of our SASH properties in partnership with the Howard Center and OneCare. We broke ground for Allard Square in South Burlington. And we were reminded time and again of the excellence of our staff, particularly the resident assistants, custodians, maintenance staff and others who work on the front lines with our residents to ensure their health and safety.

Thank you for helping the people we serve live their days with hope, health and happiness, knowing that someone has their back as they navigate their later years. Thank you for supporting Cathedral Square.



Kim Fitzgerald

Chief Executive Officer

ON THE COVER: Longtime Cathedral Square resident Doris Allard and SASH wellness nurse Susan Schmidt at the groundbreaking ceremony for Allard Square, which we have named in Doris' honor

BY THE NUMBERS

Snapshot as of 12/31/17

CATHEDRAL SQUARE

The residents we serve 1,160
1,048 older adults, 84 younger adults, 28 children

Current CSC communities 28

Current CSC apartments 962

Meals served in 2017 45,586

Development area statewide

People on housing wait list 837

SUPPORT AND SERVICES AT HOME

SASH participants 4,733
includes 1,707 community members

Housing sites hosting SASH 140

SASH partner organizations 67

of SASH-created jobs 63 FTE
(full-time equivalents)

Average annual Medicare savings per participant \$1,227

CELEBRATING OUR FIRST 40 YEARS, 1977-2017

CATHEDRAL SQUARE THROUGH THE YEARS

A Timeline of Key Events

IT STARTED WITH A FIRE & A LAND SWAP: THE STORY OF CATHEDRAL SQUARE

In February 1971, the 140-year-old Episcopal Cathedral Church of St. Paul, a historic Burlington landmark, was destroyed by fire. Located at the time on a parcel of land close to the Church Street Marketplace, the church was rebuilt on an expansive tract of land at the corner of Battery and Pearl streets, overlooking Lake Champlain and the Adirondacks — land the city traded with the church in order to realize the city's "urban renewal" vision and build the downtown mall.

Recognizing that the new parcel was much larger than the church needed for itself, and mindful of the church's strong social mission, parish leaders decided to use the excess land to help address the need in Burlington for affordable senior housing. In 1977, they established a separate nonprofit organization, secured funding and went on to build Vermont's first affordable multifamily residence for older adults in 1979: the nine-story, solar-panel-topped building adjacent to the cathedral, with 101 apartments (now 108) for older adults.

Soon thereafter, Cathedral Square became an independent nonprofit and expanded its mission. It hosted the area's original Meals on Wheels program, founded the organization now known as HomeShare Vermont (which matches older adults seeking housemates with people seeking a place to live), and created Burlington's Joint Urban Ministry Project (JUMP, a coalition of religious groups that helps families and individuals meet emergency needs). It also established the former Samaritan Connection, which provided a variety of services to older adults.

To date, Cathedral Square has developed or assisted in the creation of 59 flourishing housing communities in Vermont that provide 1,700 affordable apartments for older adults and another 530 for people needing special supports. Cathedral Square brought the first licensed assisted-living residence to Vermont in 2003 and just this year created Vermont's first affordable memory-care residence (see next page). Today the organization owns or manages nearly 30 housing communities and provides a variety of programs and services to residents, including SASH® (Support and Services at Home), the nationally recognized, CSC-created model of care coordination (see page 5).



February 15, 1971

Cathedral Church of St. Paul in downtown Burlington is destroyed by fire.



1971-73

City of Burlington negotiates a land swap with St. Paul's in order to develop a downtown mall where the church was located before the fire.

1973

St. Paul's assumes ownership of a 35,000-square-foot parcel of land bordered by Pearl, Battery and Cherry streets.

1975

The new and thoroughly modern St. Paul's Cathedral is constructed on a portion of the land. Leaders contemplate how to use the remaining land in fulfillment of its social-justice mission.



December 1976

Having identified housing for low-income seniors as a critical social need in Burlington, parish leaders vote to pursue HUD funding to construct affordable senior housing.

WANT TO LEARN MORE?

- ▶ Visit cathedralsquare.org/history to read the full "History Space" article as published in the *Burlington Free Press*.
- ▶ Visit cathedralsquare.org/mission-about-us to watch our special anniversary video highlighting 40 years of compassionate service and the people who call Cathedral Square home.

Early 1977

The parish establishes a nonprofit organization called Cathedral Square Corporation, appoints a board of directors, and hires Chuck Hoag to be the organization's first executive director.

June 1977

Construction begins on 3 Cathedral Square (aka Cathedral Square Senior Living).



February 1979

3 Cathedral Square opens with 101 apartments for "low and very low-income elders age 62 and over, and persons in need of a wheelchair-accessible apartment."



Burlington Meals on Wheels program sets up shop at 3 Cathedral Square.



1983

Sarah Carpenter becomes Cathedral Square's second executive director.

May 1984

Project Home (now HomeShare Vermont), which started two years earlier as a program of the Retired Senior Volunteer Program, becomes a program of Cathedral Square.

2017 HOUSING HIGHLIGHTS

MEMORY CARE AT ALLEN BROOK, WILLISTON

One of our crowning achievements in 2017 was developing Memory Care at Allen Brook, a Cathedral Square initiative to bring licensed, affordable memory care to Vermont, where the number of people living with Alzheimer's or another form of dementia is projected to grow an astounding 42% by 2025. While there are numerous private memory-care facilities in our region, costs exceed \$9,000 a month. Options are virtually nonexistent for people living on Medicaid.

Recognizing the tremendous need, it has long been our dream to offer licensed memory care to Vermonters on Medicaid. When we learned in early winter that the former VNA Respite House was for sale, we took the leap. With broad community and state support and generous financial backing from the University of Vermont Medical Center, the Hoehl Family Foundation, the Amy Tarrant Foundation, the Vermont Housing Finance Agency, the Fountain Fund and others, we purchased the property in mid-September and got to work. Just over three months later, on Dec. 27, the 14 homes were move-in ready and we welcomed our first resident.

Today residents at Allen Brook are receiving compassionate, round-the-clock care and support from staff trained in the trademarked "Best Friends" approach to dementia care.

"I don't know what I would do if this wonderful facility wasn't here. I quit my job eight years ago to care for my mom because she truly couldn't be on her own. Now she's in a great place and so happy, and I have my life back again. I am so grateful to Cathedral Square for making this happen and for all of their compassion and help. I just can't thank them enough."

— Donna Pires, Jericho

From top: The entrance to Memory Care at Allen Brook; activities coordinator Ellen Gagner shares a warm moment with an Allen Brook resident; Donna Pires (right) and her mother, Dora, who now lives at Allen Brook





ELM PLACE, MILTON

Elm Place, our newest affordable residence and Vermont's first multifamily building certified to "passive house" energy standards, opened in March. All 30 one-bedroom homes were leased within three weeks. We celebrated the opening with a festive outdoor gathering in early June keynoted by Gov. Phil Scott and highlighted by three Elm Place residents who shared their stories with the crowd. In lieu of a traditional ribbon cutting, we cut a power cord to symbolize the building's energy-saving features.

A few weeks later, we hosted Sen. Bernie Sanders, who had requested a tour and an information session with community members to learn about their needs and concerns as older Vermonters.

The energy features of the building have garnered much attention and resulted in several awards. Elm Place won three national awards from the Passive House Institute U.S. (PHIUS), including 2017's "best overall project" and "best multifamily project." Soon after the year ended, Efficiency Vermont bestowed its multifamily "Better Buildings by Design" award on Elm Place.

Buildings that meet the latest PHIUS building standard are designed to use 86% less energy for heating compared to a standard code-compliant building of the same size, depending on climate zone and building type.



Left, from top: The first-floor lounge at Elm Place; the Harry & Jeanette Weinberg Community Room; flanked by town officials and others involved in the development of Elm Place, Gov. Phil Scott cuts the power cord, signaling the building's grand opening; Cindy Reid and Kim Fitzgerald of Cathedral Square answer Sen. Sanders' questions about the building; a light moment during the senator's meeting with residents

1985

Cathedral Square creates Richmond Terrace, with 16 apartments for older adults and people with disabilities.



1988

Cathedral Square founds the Samaritan Connection "to assist elderly, disabled and handicapped people with home maintenance and minor repairs...and all persons with any kind of assistance which we may be able to provide."

Heineberg Senior Housing opens, bringing 82 apartments to Burlington's New North End.



1991

Whitney Hill Homestead opens in Williston (44 homes).



1993

The 112-home Williston Woods forms a cooperative.

1994

SHARE, founded in 1988 with the support of the Vermont Housing & Conservation Board with the goal of promoting group shared residence and supportive living, becomes a program of Cathedral Square.

ALLARD SQUARE, SOUTH BURLINGTON

January 1996

Cathedral Square assumes the Joint Urban Ministry Program (JUMP), originally established in 1988 by the Rev. Becky Strader and Janet Patterson to provide counseling and referrals, direct emergency relief (food, clothing, transportation, etc.), and advocacy for individual clients.

1997

Monroe Place opens in Burlington, providing 16 apartments with supportive services to people with mental-health challenges through a partnership with the Howard Center.



Holy Cross Senior Housing opens in Colchester (40 homes).



1998

Nancy Rockett Eldridge becomes Cathedral Square's third executive director.

Cathedral Square partners in the creation of 5 housing communities providing a total of 80 apartments: South End Community Housing (6), Cox House (7), Lake Street (7) and Eagle Crest (60).

Cathedral Square purchases Jeri Hill in Jericho, maintaining the affordability of 24 homes.



We celebrated the start of construction of Allard Square, the first major residential development in South Burlington's new City Center, with a groundbreaking ceremony on Nov. 1. The highlight of the ceremony was sharing the moment with Doris Allard, who at 93 is Cathedral Square's longest-tenured resident, having lived at CSC's flagship residence in Burlington for 39 years. We named the development Allard Square in her honor.

Slated to open in October 2018, Allard Square will provide 39 one- and two-bedroom apartments for older Vermonters at both affordable and market-rate rents. The property will meet Efficiency Vermont's "High Performance Building" standards and will offer a number of amenities to residents.



Rendering of Allard Square



From left: Art Casavant, People's United Bank; Jeff Kantor, JD Kantor Inc.; Katie Buckley, Vermont Department of Housing & Community Development; Cindy Morgan, New England Federal Credit Union; Kim Fitzgerald, Cathedral Square; Doris Allard; Chris Snyder, Snyder Braverman Development Co.; Gus Seelig, Vermont Housing & Conservation Board; Dave Adams, Vermont Housing Finance Agency; Cindy Reid, Cathedral Square; Ken Braverman, Snyder Braverman Development Co.

BRADLEY HOUSE, BRATTLEBORO

Cathedral Square provided technical assistance to Holton Home, the nonprofit owner of this historic residential-care facility, which is undergoing major renovations and building an addition that will increase the number of resident rooms from 28 to 35.

In addition, Cathedral Square helped raise \$5.3 million in capital for the development. Construction began in April 2017 and is expected to wrap up by fall 2018.

.....
Gov. Phil Scott with Cindy Jerome, executive director of Holton Home, at the groundbreaking ceremony for the Bradley House addition



JUNIPER HOUSE, BURLINGTON

This 70-home building for older adults, to be constructed on North Avenue in Burlington as part of the Cambrian Rise development, received \$529,500 in funding from the City of Burlington and is now fully permitted. We continue to pursue the remaining funds needed to start construction.



TRANSFERS OF OWNERSHIP

Cathedral Square in 2017 assumed full or partial ownership of three properties formerly owned by limited partnerships for the purpose of tax-credit financing. With the credits now expired, McAuley Square and Ruggles House (both in Burlington) transferred to CSC, and we took an ownership interest in Holy Cross (Colchester) along with the local partner, Holy Cross Senior Housing Corp. Cathedral Square has managed all of these communities since they were developed 15+ years ago.

2017 SASH HIGHLIGHTS

SASH®—Support and Services at Home—is a program of care coordination designed for Medicare recipients who live at home. Developed and piloted by Cathedral Square in 2009, today it is available in every Vermont county and serves about 5,000 Vermonters. In addition to care coordinators and wellness nurses based in affordable housing communities, SASH teams consist of professionals from area agencies on aging, home health agencies, community mental health and developmental services, primary care providers and hospitals. The program is administered in Vermont by Cathedral Square and implemented locally by the state's network of affordable-housing providers and public-housing authorities.

BEYOND VERMONT

2017 saw growing recognition of SASH® as a model program that helps people stay healthy and living at home while reducing the growth of Medicare costs.

In January, the U.S. Department of Housing & Urban Development awarded \$15 million to 40 affordable-housing communities throughout the U.S. that are testing a program modeled after SASH. Staff at Cathedral Square are providing training and consulting services for the three-year, nationwide pilot inspired by SASH.

By March, the first full replication of SASH outside Vermont was underway. SASH staff from Cathedral Square traveled to Providence,



Kristi Poehlmann, SASH nurse consultant and health-systems educator (top left), leads a small-group discussion with staff at Saint Elizabeth Community in Rhode Island.



2001

South Burlington Community Housing opens, providing 10 independent-living apartments for adults with severe mobility impairments who require at least 4 hours of personal care services daily. Personal-care support is available on site 24 hours a day through a unique partnership with the VNA.



Several additional Cathedral Square communities come online:
McAuley Senior Housing (55),
McAuley Scholars House (12),
McAuley-Independence Place (7),
Ruggles House (15)
and Evergreen (18 managed).



Rhode Island, to provide technical assistance and training to staff at Saint Elizabeth Community, a nonprofit provider of affordable housing to older adults. In keeping with the fundamental SASH premise that all staff in a housing organization have a role to play in helping residents stay healthy at home, a wide range of Saint Elizabeth staff participated in the training, including the vice president, chief operating officer, wellness nurse, care coordinator, and maintenance and custodial staff.

NEW MENTAL HEALTH PILOT

SASH and the Howard Center launched a year-long pilot at the end of 2017 that embeds a mental-health clinician from the Howard Center in SASH teams at two Cathedral Square housing communities.



The program is providing residents with easy access to flexible, team-based supports, including one-on-one support and group programming. It is funded by OneCare Vermont, which is coordinating the state's trial of the "all-payer" model, which delivers health services based on prevention as opposed to fees for services when people are ill.

The pilot is expected to serve up to 200 residents. Goals include shortened timeframes to access mental-health services, fewer avoidable emergency room visits, improved patient experiences and enhanced inter-agency coordination.

2002

Cathedral Square finalizes plans to create an assisted-living option at CSSL (formerly called 3 Cathedral Square), its original residence on Cherry Street.

2003

Cathedral Square creates Vermont's first licensed assisted-living residential community at CSSL. Today up to 40 of the 108 apartments are designated for assisted living.



Cathedral Square completes the rehabilitation of Whitcomb Woods, preserving 65 affordable homes.



2004

Cathedral Square creates 19 fully accessible apartments at the barrier-free housing community known as Whitcomb Terrace in Essex.



2005

Project Home becomes an independent nonprofit and changes its name to HomeShare Vermont.

2006

Cathedral Square receives the 2006 Smart Growth Award from the Vermont Forum on Sprawl in recognition of its partnership in South Burlington's Farrell Street/O'Dell Parkway neighborhood.

SASH IN ACTION: MANAGING HYPERTENSION AT HOME

In summer 2016, "Teresa," a 79-year-old SASH participant living in affordable housing, was at home recovering from a recent fall. A SASH wellness nurse visited Teresa as part of the routine "transitions care" that SASH provides.

While visiting with Teresa, the nurse reconciled Teresa's medications in an attempt to root out possible causes for the fall. In the process, she discovered that Teresa's blood-pressure medicine was missing and that Teresa was confused about how to take her medications. The nurse also checked Teresa's blood pressure, which came in at 172/90 — well over what is considered "controlled."

High blood pressure, often called the "silent killer," is the most common chronic condition reported by SASH participants in Vermont.

It is a major risk factor for both heart disease and stroke — two conditions that are responsible for one in four deaths among this group. SASH stepped up to change this story.

With funds from the Centers for Disease Control & Prevention (CDC) and in partnership with the Vermont Department of Health, SASH developed a program to help participants manage their high blood pressure on their own, at home.

The program calls for consistent blood-pressure monitoring and record-keeping (participants either attend on-site clinics or use personal blood-pressure monitors provided by SASH). Readings are tracked and shared with each person's primary-care provider, and participants take part in programs at the housing site such as nutrition evaluations and health coaching.



SASH wellness nurse Rice Haunstrup takes a blood-pressure reading in a participant's home.

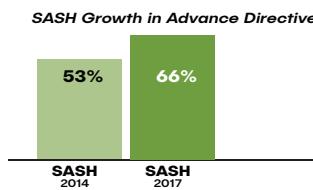
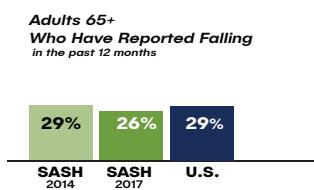
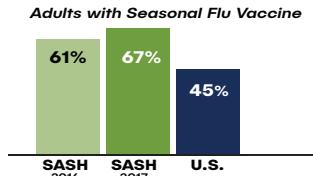
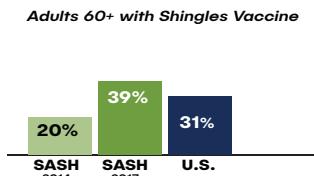
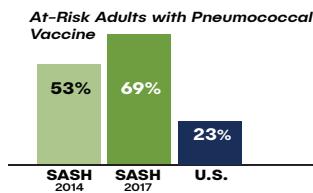
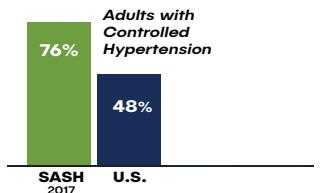
The program is making a difference. Among SASH participants with hypertension, 87.8% have readings considered "in control" by industry standards — well above the national average of 49.3% — and 70% achieved a reduction in systolic blood pressure within just three to six months.

*"Before I got into SASH,
I didn't think I'd be around
much longer. I couldn't even
make it down the hall. Now
I walk regularly every day,
and I keep my canes in the
corner as a reminder."*

— SASH participant at Thayer House,
a Cathedral Square residence in Burlington

Teresa was no exception. Less than one year in, Teresa had her blood pressure under control. Readings of 138/74 are now her norm.

Through routine monitoring, tracking and regular communication between her SASH support team and her primary-care physician, Teresa continues to successfully manage her chronic condition on her own, at home.



DOCUMENTING THE SUCCESS OF SASH

Both a 2017 data brief from the Centers for Disease Control & Prevention (CDC) and a recently completed pilot between SASH and the Community Health Centers of Burlington serve to validate the role of SASH in controlling hypertension and other chronic diseases.

The CDC brief, "Hypertension Prevalence & Control Among Adults: United States, 2015-2016," pegs the national rate of hypertension in adults age 60 and older at just over 63%—compared to 46% for SASH participants. The national rate of those with *controlled* hypertension, meanwhile, comes in at 49%, compared to SASH's 76%.

SASH's good work in this area also became apparent in the results of the pilot program, which involved a group of SASH participants diagnosed with high blood pressure.

With enhanced education, support and communication from their SASH wellness nurses and primary-care physicians, participants reduced their systolic blood pressure (the top number in a reading) an average of 20 mmHg by the end of the pilot.

THE POWER OF PARTNERSHIPS

What makes SASH work? First, SASH is embedded in affordable housing, where most participants live. By using Vermont's affordable-housing network, SASH is able to provide services in just about every corner of the state.

Second, SASH is a partnership. It combines the strengths of 70+ partners at the local level that have been providing supports and services for years: home-health agencies, area agencies on aging, primary-care providers, community hospitals, and agencies providing developmental, mental health and addiction services.

Six designated regional housing organizations oversee the program, working with 22 housing organizations that operate SASH in their communities and with SASH coordinators and wellness nurses who provide services and programming. The coordinators and nurses in turn work with partners at the local level, who collaborate in promoting individual and community health and well-being. It is very much a team sport! Visit sashvt.org/Partners to learn more.



Cathedral Square receives the EPA Partner of the Year Award from the Alliance to Save Energy in Washington, D.C., for "accomplishments and leadership...to achieve a healthier economy, a cleaner environment, and greater energy security."



Cathedral Square's wait list grows to 600 names.

2007

Cathedral Square wins the 4th annual Vermont Community Development Program's "Community Achievement Award for Housing" for the barrier-free, universally accessible design of Whitcomb Terrace, created in partnership with Housing Vermont and the Village of Essex Junction.

The new Farrell Street property opens in South Burlington, providing 63 affordable apartments for older adults ("Grand Way I") as well as space for the VNA Adult Day Program and offices for Cathedral Square, HomeShare Vermont and the United Way.



2009

SASH® is piloted at Heineberg Senior Housing in Burlington's New North End.



Town Meadow, with 48 affordable homes, opens in Essex.



Four Winds in St. Albans is rehabilitated, restoring 44 affordable homes in Franklin County.



CSSL gets a "green retrofit," including rooftop solar panels.



2010

Grand Way II – the second phase of the Farrell Street development – is completed (28 homes).



2011

SASH® becomes part of the Vermont Blueprint for Health health-reform initiative.



2012

SASH® expands services to 76 sites statewide.



OUR WONDERFUL VOLUNTEERS

We are tremendously grateful to the people who contribute their time and talents as Cathedral Square volunteers. They bring so much joy and beauty and *fun* to our residents and the places they call home. Over the years, many long-lasting friendships have developed between volunteers and Cathedral Square residents. Whole families sometimes get in on the action, as in the family that delivers items

from the food shelf to Williston residents or the family that helps out regularly at our assisted-living home in Burlington. Cathedral Square volunteers provide transportation to appointments, tutor Spanish and Vietnamese residents in English, beautify our grounds and gardens, and entertain us with song and dance. A heartfelt thank-you to all our volunteers. We are so fortunate, and so grateful, to have you!



Clockwise from top:
Vermont State Police officer Amber Pouliot visits South Burlington Community Housing monthly with her therapy dog, Kenzie, bringing fun and companionship to residents. From left are residents Ben French, Andrew Bolognani and Guy Salvomini.

Members of the Flying Hooves 4-H Club get some expert knitting tips from residents at Town Meadow Senior Housing in Essex. The teens visit a different Cathedral Square residence each month.

Members of the University of Vermont Ballroom Dance Team treated residents at Thayer House in Burlington to one-on-one lessons.

Longtime volunteer Kuno Olson of Burlington is always at the ready, providing transportation for residents who need help getting to medical appointments and other destinations.



ROSIE & RUMMY

If you stopped by Whitney Hill Homestead on Tuesday afternoons during the 2016-17 school year, you likely would have heard laughter and joyful conversation coming from the community room. It was all because of Rosie, a Williston 8th grader at the time, who had contacted Cathedral Square to see what she might do to benefit residents and count toward her 8th grade challenge. After bouncing a few ideas around, the decision was made to offer a variety of games

on Tuesday afternoons. Three weeks in, Rosie and the three residents who joined her — Phyllis, Sally and Jean — settled into playing rummy, and they've never looked back! The trio formed a wonderful relationship with Rosie during the year. The icing on the cake: These three women might never have formed the close bond they now share if Rosie hadn't come along. The group continues to play, smile and sometimes giggle — all thanks to our fabulous volunteer Rosie.



◀ We're fortunate to have a close and longstanding volunteer relationship with GE Healthcare, whose employees consistently go above and beyond. They have replaced dozens of raised garden beds at Cathedral Square residences over the years. We also regularly host volunteer groups from AmeriCorps, Global Foundries, Rhino Foods, and Dinse, Knapp & McAndrew.

These awesome volunteers from Champlain College endured 90° heat while painting a gazebo, picnic table and planters at a Cathedral Square residence in Williston. We look forward to welcoming them back this summer!



2013
SASH® now operates at 94 affordable-housing locations in Vermont.

Thayer House II is completed, adding 36 homes.

2014
Wright House opens in Shelburne (36 homes).



Richmond Terrace is fully rehabilitated, upgrading 16 affordable homes.



2015
Kim Fitzgerald becomes Cathedral Square's fourth chief executive officer.

Kelley's Field is completed in Hinesburg (24 homes).



Cathedral Square is named one of the "Best Places to Work in Vermont."

2015
BEST PLACES TO WORK IN VERMONT

OUR GENEROUS SUPPORTERS

A federally commissioned evaluation of SASH™ shows that SASH™ significantly slows the growth in Medicare expenditures, with the average participant reducing costs by \$1,536 a year.

SASH™ receives the 2016 Archstone Award for Excellence and Innovation from the American Public Health Association.



Cathedral Square works with the Addison County Community Trust to transform a contaminated mobile-home park in Waltham into McKnight Lane, Vermont's first affordable "net zero" community of Vermont-made "Vermod" modular homes (14 homes).



Cathedral Square is named one of the "Best Places to Work in Vermont" for the second year.

Cathedral Square partners with Eric Farrell, Champlain Housing Trust and Housing Vermont on plans for "Cambrian Rise," an affordable, multi-generational community at the former Burlington College site. CSC works to secure funding for the 70-home residence, to be named Juniper House.



January 2017

HUD launches nationwide pilot of a supportive-services program for older adults inspired by SASH™, awarding \$15 million over three years to 40 senior housing developments in seven states.

Cathedral Square's wait list for housing grows to 800.

PINNACLE PARTNERS

Gifts over \$50,000

Hoehl Family Foundation
Amy E. Tarrant Foundation
University of Vermont (UVM)
Medical Center

MISSION STEWARDS

Gifts of \$5,001-\$10,000

Champlain Investment Partners LLC
Mutual of America
Blue Cross Blue Shield of Vermont
Fountain Fund

KINSHIP COLLABORATORS

Gifts of \$2,001-\$5,000

Cathedral Church of St. Paul
Farrell Real Estate
NFP Property & Casualty Services
Otis Atwell
People's United Bank
ReArch Company LLC
Temperature Controls of Vermont
TLC Nursing Associates
Wright & Morrissey Inc.

MISSION CHAMPIONS

Gifts of \$1,001-\$2,000

Daly & Daly PC, Attorneys at Law
Duncan • Wisniewski Architecture
Federal Home Loan Bank of Boston
Pearson & Associates

COMMUNITY BUILDERS

Gifts of \$501-\$1,000

Christopher Davis
Efficiency Vermont
Nancy and Mark Eldridge
Episcopal Diocese of Vermont
Charles Hoag
HomeShare Vermont
Housing Vermont
HP Cummings Construction Co.
J.A. Morrissey Inc.
JD Kantor Inc.
Langrock Sperry & Wool
Redstone
Snyder Braverman Development LLC
Elizabeth Steele
TJ Boyle Associates LLC
Lillian and Bruce Venner

Vermont Housing & Conservation Board

Vermont Housing Finance Agency
Willis Towers Watson

TEAM BUILDERS

Gifts of \$251-\$500

Allen, Brooks & Minor
Barden Inspection & Consulting
Burlington Electric Department
Kimberly Fitzgerald
Gensberg, Atwell & Greaves PLLC
Erik Hoekstra
The Medical Store
William Pendlebury
Scott+Partners Architecture
SRW Environmental
Vermod LLC
Weston & Sampson

CARING COMPANIONS

Gifts of \$100 to \$250

Boutin Family Foundation Inc.
Deborah Bouton and Dan Herman
Ken Bridges
Betsy Davis
Frank and Ducky Donath



"Last year I heard someone say, 'Oh my God, Rainbow lost her spunk — she went into senior housing.' Well, I didn't lose my spunk. It took a hell of a lot of spunk for me to decide this is where I needed to be and to embark on this next adventure. I am so grateful that I gave it a chance. It's made such a difference."

— Rainbow Cornelia
Cathedral Square resident since 2016

Molly Dugan
Employees' Community Action Council, General Dynamics
Nancy Farrell

The Very Rev. Jeanne Finan and Thomas Eshelman
James Hester

Craig Jones
Michael Julow
Patrick and Mary Kearney

Ann Livingston
McSoley McCoy & Company
Betty Miles

Carol Moran-Brown
Polly Nichol

O'Brien & Kaffengerber Inc.
Pill-Maharam Architects
Cindy Reid

Shelley Richardson
John and Alice Rouleau
Pat Robins and Lisa Schamberg

Bill and Kate Schubart
Charles Smith
Paul and Pam Van de Graaf
Charles Van Royen
Judy and Stephen Walke
Laura and Eugene Wilson
Amy Wright
Sandy and Margy Zabriskie

GOOD NEIGHBORS

Gifts up to \$99

Anonymous
Anonymous
Anonymous
Gail Benjamin
Gerald and Karin Davis
Sam Falzone
Christine Finley
Joseph Frank
Carolyn and John Gipson
Natalie Hall

"I'm very lucky to be living here. It's a good place because I can still be independent, but there is help here around the clock, whenever I need it, from the VNA. I have my own apartment with a kitchen, and I can do things for myself. This is one of the few places like this in the country — there just aren't many options for people in my situation. If I didn't live here, I would have to be in a nursing home — and that is not where I need to be."

— Andrew Bolognani
Cathedral Square resident since 2005



Judith Janone
 Luck Kalanges
 Howard and Elaine Kirby
 Gisele and Andrew Kloeckner
 Christopher and Jennifer Leopold
 Mary and Richard McClintock
 Sue McCormack
 Shirley Overbaugh
 Jeanne and Anthony Pizii
 Richard and Lillian Robinson
 Anya Schwartz
 Sisters of Mercy
 Willard Smith
 Melissa Southwick
 Barbara Stamm
 Linda Verba
 Conrad and Cheryl Wexelblatt
 Whitcomb Woods Residents Assoc.
 Alice Winn

TRIBUTE GIFTS

In Honor of Paul and Pam Van DeGraaf
 In Memory of Polly Bebe Bove
 In Memory of Elizabeth (Betty) Cyr
 In Memory of Bryna D. Frank
 In Memory of Arlene Griffin
 In Memory of Esther Kearney
 In Memory of Judy Tonnemacher

GIFTS IN HONOR OF OUR 40TH ANNIVERSARY

Blue Cross & Blue Shield of Vermont
 Burlington Electric Department
 Cathedral Church of St. Paul
 Champlain Investment Partners
 Daly & Daly PC, Attorneys at Law
 Duncan • Wisniewski Architecture
 Efficiency Vermont
 Farrell Real Estate
 Federal Home Loan Bank of Boston
 Gensberg, Atwell & Greaves PLLC
 HomeShare Vermont
 Housing Vermont
 HP Cummings Construction Co.
 J.A. Morrissey Inc.
 JD Kantor Inc.
 Langrock Sperry & Wool, LLP
 McSoley McCoy & Company

The Medical Store
 Mutual of America
 NFP Property & Casualty Services
 O'Brien & Kaffenberger Inc.
 Otis Atwell
 People's United Bank
 Pill-Maharam Architects
 ReArch Company LLC
 Redstone
 Scott+Partners Architecture
 Snyder Braverman Development LLC
 SRW Environmental
 T.J. Boyle Associates LLC
 Temperature Controls of Vermont
 TLC Nursing Associates
 UVM Medical Center
 Paul and Pam Van de Graaf
 Vermod LLC
 Vermont Housing & Conservation Board
 Vermont Housing Finance Agency
 Weston & Sampson
 Willis Towers Watson
 Wright & Morrissey Inc.

GIFTS FOR MEMORY CARE AT ALLEN BROOK

Ken Bridges
 Cathedral Church of St. Paul
 The Fountain Fund
 Amy E. Tarrant Foundation
 Hoehl Family Foundation
 UVM Medical Center
 Vermont Center for Independent Living
 Vermont Housing & Conservation Board

DEVELOPMENT FUNDERS

Amy E. Tarrant Foundation
 Burlington Housing Authority
 Burlington Housing Trust Fund
 Cathedral Church of St. Paul
 Commons Energy
 Efficiency Vermont
 The Fountain Fund
 Hoehl Family Foundation
 HOME Investment Partnership

National Housing Trust
 New England Federal Credit Union
 People's United Bank
 South Burlington Housing Trust Fund
 UVM Medical Center
 Vermont Community Development Program
 Vermont Community Loan Fund
 Vermont Gas
 Vermont Housing & Conservation Board
 Vermont Housing Finance Agency
 Vermont State Housing Authority
 Vermont Weatherization Assistance Program
 Vermont Center for Independent Living
 The Harry & Jeanette Weinberg Foundation

SASH FUNDERS

Cathedral Square Corporation
 Center for Health & Learning
 Centers for Disease Control & Prevention

Centers for Medicare & Medicaid Services
 Champlain Investment Partners
 Department of Vermont Health Access
 National Center for Healthy Housing
 UVM Center on Aging
 UVM Medical Center
 Vermont Department of Disabilities, Aging & Independent Living
 Vermont Department of Health
 Vermont Housing & Conservation Board

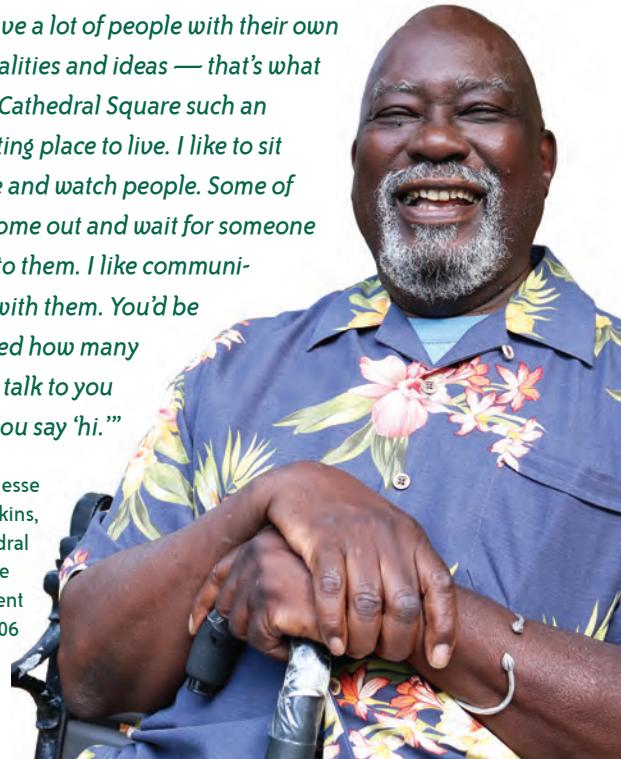
IN-KIND DONATIONS

Bonnie Acker
 August First Bakery
 Automaster
 Butch & Babes
 Carroll Photos
 Cedar Wood Natural Health Ctr.
 Champ Car Wash
 Chappell's Florist
 Duncan • Wisniewski Architecture

Elizabeth Chant
 City of South Burlington
 ECHO Leahy Center for Lake Champlain
 Essex Speedway
 The Farmhouse Group
 Flynn Center for the Performing Arts
 Folino's Wood Fired Pizza
 GE Healthcare
 Girlington Garage
 Paul Grover
 Green Mountain Quilters Guild
 Mary Hill
 Kim and Scott Ireland
 J.A.M. Construction
 Keurig Green Mountain
 Leunig's Bistro
 L.L. Bean
 Massage Envy
 Misery Loves Company
 Montstream Arts
 Old Spokes Home
 Otterbox

"We have a lot of people with their own personalities and ideas — that's what makes Cathedral Square such an interesting place to live. I like to sit outside and watch people. Some of them come out and wait for someone to talk to them. You'd be surprised how many people talk to you when you say 'hi.'"

— Jesse Watkins,
 Cathedral Square resident
 since 2006



Penny Cluse Cafe
 Karen Pike Photography
 Pizzeria Verita
 Jernigan Pontiac/Fred Solomon
 David Ryan
 Nitti Sachdeva
 Saratoga Olive Oil
 Shelburne Farms
 Sheraton Burlington
 Snowflake Chocolates
 Stephen & Burns Aveda Salon & Spa
 Nancy Stone
 Stoweflake Inn and Spa
 Sue Schmidt Comedy
 Thymes Two/Nance Nahmias
 Town of Milton
 UVM Department of Athletics
 Vermont Comedy Club
 Vermont International Film Festival
 Vermont Lake Monsters
 Vermont Tree Goods
 Yoga Roots

February 2017
 Saint Elizabeth Community in Rhode Island contracts with Cathedral Square to replicate the SASH® program.

March 2017
 Elm Place opens in Milton and becomes Vermont's first multifamily home certified to meet stringent "passive house" energy standards (30 homes).



September 2017
 Nearly 200 people attend the celebration of Cathedral Square's 40th year.

Cathedral Square purchases the former VNA Respite House in Williston to create Vermont's first affordable memory care residence for low-income Vermonters with Alzheimer's and other forms of dementia.

October 2017
 Construction begins on the 39-home Allard Square in South Burlington's emerging city center.



December 2017
 With major renovations completed in just three months, Memory Care at Allen Brook opens, providing affordable homes for 14 residents and round-the-clock dementia care.



CSC unveils a new logo representing housing, its three-pronged mission and wraparound services.



CONSOLIDATED ASSETS & LIABILITIES

ASSETS

Cash & Investments	\$3,592,492
Reserves & Restricted Accounts	\$6,203,193
Land, Buildings & Furniture (net)	\$64,928,774
Equity Contributions	\$768,607
Accounts Receivable	\$1,135,366
Notes Receivable	\$2,450
Prepays & Other Assets	\$346,791
Resident Security & Escrow Deposits	\$411,136
TOTAL ASSETS	\$77,388,809

LIABILITIES & NET ASSETS

Notes Payable	\$44,475,110
Accrued Interest Payable	\$38,803
Other Liabilities	\$4,194,473
Resident Security & Escrow Deposits	\$442,238
Accounts Payable	\$327,924
TOTAL LIABILITIES	\$49,478,548
TOTAL NET ASSETS	\$27,910,261
TOTAL LIABILITIES & NET ASSETS	\$77,388,809

CONSOLIDATED REVENUE & EXPENSES

REVENUE

Property Management/ Service-Enriched Housing	\$11,023,161
SASH (Support and Services at Home)	\$3,281,721
Development	\$440,086
Grants & Other Income	\$177,768
TOTAL REVENUE	\$14,922,736

EXPENSES

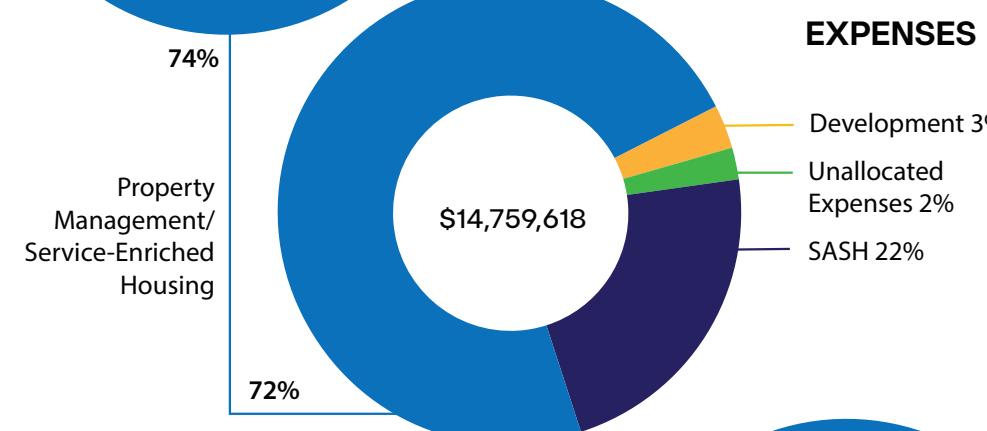
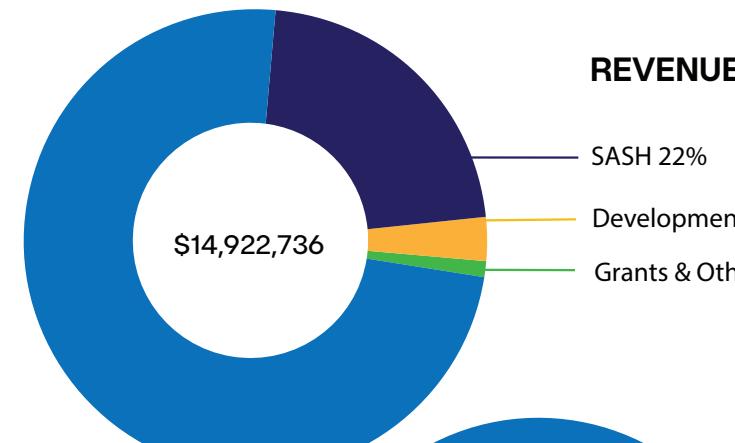
Property Management/ Service-Enriched Housing	\$10,684,143
SASH (Support and Services at Home)	\$3,276,689
Development	\$452,721
Unallocated Expenses	\$346,065
TOTAL EXPENSES	\$14,759,618

CORPORATE & PROPERTY ASSETS MANAGED

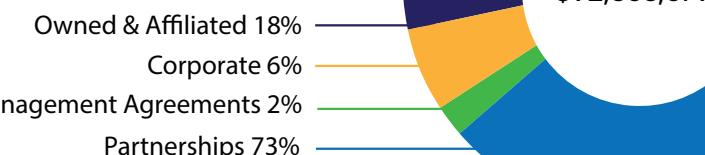
Corporate	\$5,957,467
Owned & Affiliated	\$16,818,211
Partnerships	\$67,784,075
Management Agreement	\$1,803,926
TOTAL MANAGED ASSETS	\$92,363,679

FINANCIAL STATEMENT

FISCAL YEAR 2017
Oct. 1, 2016 – Sept. 30, 2017



CORPORATE & PROPERTY ASSETS MANAGED

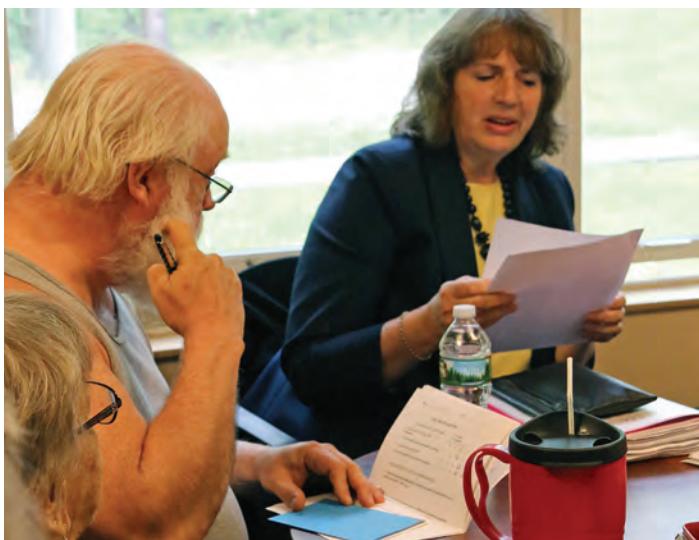


STAFF MEMBER HELPS RESIDENTS REVISIT THEIR PASTS THROUGH GUIDED AUTOBIOGRAPHIES

In high school, Judy Lavallee always wanted to write about her life — but never did. As an adult, she started composing stories about her youth — but never finished.

Now, with the help of a “guided autobiography” (GAB) program led by Cathedral Square staff member Donna Gacetta, Judy has recorded on paper some of her important personal history.

Judy, 78, a resident at Cathedral Square’s Town Meadow residence in Essex Junction, remembered a lot about herself during the program. “It was a wonderful bringing-you-out-of-yourself thing,” she says.



GAB instructor Donna Gacetta reads a participant's story.

Bringing people out of themselves and getting their memories on paper is the focus of the program. Donna, trained in the GAB process, offers the free, eight-week program at one to two Cathedral Square residences a year.

“I want to help people tell their stories in their own words and leave them for their families,” Donna says.

Each week, participants in Donna’s sessions write a two-page story at home about an assigned theme, such



GAB participants at Cathedral Square share their memories.

as health, money, spirituality and death. They then meet and read it aloud to the group.

Participants respond to what is read but don’t critique, and confidentiality is stressed.

GAB proponents say the program can increase acceptance of self and others, reduce anxiety and foster connections. The program provided those benefits for Judy.

“It brought us closer together,” Judy says. “It also helped us to look back into our lives and pull things out,” she adds. “It brought out a gamut of emotions.”

Participant Stewart McHenry, 81, experienced a gamut of emotions, too. A resident at Cathedral Square Senior Living in Burlington, Stewart wrote about his first job delivering newspapers in Chicago and having polio as a child.

“I never expected to get so deep [into my feelings] so quickly,” Stewart notes. “I had never thought about what it was like to be sick in a hospital and not see my parents.”

Through the program, some people discover that their lives have been closer to ideal than they thought.

“It’s one of the many benefits of the program — helping people feel good about themselves,” Donna says.

— by Jessica Clarke

Jessica Clarke is a freelance writer who lives in Burlington.

2017 QUICK TAKES



Telehealth success! SASH wellness nurse Christina Melvin and CSC staff celebrated the first medical appointment via video-conference visit between a Cathedral Square resident and her physician.



We bid a fond farewell to retirees Linda Ready and Jim LaRoque (left) and celebrated the 30-year tenure of Jim Whitcomb, announcing that the garden at Memory Care at Allen Brook will be named in honor of him and his late father.



Staff volunteers prepped for renovations at Memory Care at Allen Brook the day we closed on the property.



HUD Regional Administrator David Tille (left) and Field Director Mike McNamara pose with CEO Kim Fitzgerald during Tille’s November visit to Cathedral Square.

SCENES FROM OUR 40TH ANNIVERSARY CELEBRATION

September 21, 2017



Cathedral Square

Advancing Healthy Homes, Caring Communities & Positive Aging since 1977

412 Farrell St., Suite 100 | South Burlington, VT 05403

CathedralSquare.org

802-863-2224 • info@cathedralsquare.org
FAX: 802-863-6661 • TTY/TTD: 800-253-0191



*Cathedral Square is a nonprofit, 501(c)3 organization and an equal-opportunity employer and housing provider.
Our organization and our communities are welcoming and inclusive, embracing diversity in all its forms.*

