

Performance Measures and Narrative Report

Vermont Agency of Human Services Department of Disabilities, Aging, and Independent Living Act 186 Pilot Planning Grant

Awardee: Riverflow Community, Inc.
Grant #: 03460-6-2604
Performance Period: January 1, 2024 – March 31, 2024

1. Update on the management of grant funding and financial services for Riverflow's housing project.

During this second reporting period, Riverflow Community continued to refine our accounting/bookkeeping processes. Our management of ACT 186 grant funds has proceeded smoothly, with a tracking system for both grant-eligible expenses and non-planning expenses. We have submitted a few grant applications for renovation funding and have had various meetings with potential funders both locally and beyond Vermont.

2. Update on suitable housing locations and collaborate with other partners to ensure the project remains within constraints through completion.

The Riverflow Community team has spent considerable time at the Monkton property identifying and planning for its future development, including various walkthroughs/meetings with potential contractors, including land surveyors, permit and energy consultants, sprinkler and fire alarm installers, space planners, etc. These discussions have provided essential information as we continue to refine Riverflow's operating budget and capital expense plan. They have also further clarified the costs involved in bringing the existing house into compliance with Vermont's Therapeutic Community Residence regulations and have also helped identify the renovations necessary to make the house safe, suitable, and supportive of community life. We have also discussed Riverflow's development with the area's fire marshal and town zoning office.

Our contacts at the Howard Center, Cathie Buscaglia and Delaina Norton, joined us for a tour of the property in early March, and we have scheduled

a property walkthrough with Washington County Mental Health Services (WCMHS) for April 19th. We have continued to meet with individuals at Champlain Housing Trust, Vermont Community Foundation, Greater Burlington Industrial Corporation, Vermont Housing Conservation Board, and other local entities that have potential to support Riverflow Community's mission.

3. Update how individuals with developmental disabilities living in the State of Vermont will be able to apply to Riverflow Community.

Our Intentional Community Consultant has reached out to various colleagues to ensure that Riverflow's admission policy reflects best practices. Our admission policy is now posted on the Riverflow Community website and includes a description of our admission criteria and process, as well as an online contact form. Riverflow Community's intentional, but not exclusive, commitment to serving adults with higher support needs means that we will need to carefully consider each candidate's level of need in order to optimally balance the diversity of needs inherent in that commitment.

4. Update on progress with Howard Center and WCMHS and the planning process to ensure Riverflow is developing its intentional living community in compliance with all federal and Vermont Developmental Disabilities laws and regulations, and the Vermont System of Care Plan.

In addition to our communication on progress with the Howard Center and WCMHS described above, we have scheduled a property visit with our contacts at DAIL in early May. We have also had discussions with members of DAIL's Division of Licensing and Protection for guidance on renovations necessary to meet TCR compliance and on the project's adherence to the Medicaid Settings Rule, Vermont's System of Care Plan, and Vermont Developmental Disabilities laws and regulations. Our intentional community consultant also has extensive experience complying with these various safety and settings regulations, and continues to guide our progress in this area.

Update on progress creating and establishing relationships with Designated Agencies and Specialized Service Agencies including Franklin and Addison counties.

In addition to our relationship-building progress with the Howard Center and WCMHS during this reporting period as mentioned above, the Riverflow Community has spoken with Greg Mairs, the Developmental Disabilities Director at Counseling Service of Addison County to introduce them to Riverflow and to discuss their potential involvement and collaboration with future development of the Community.

5. Update on progress of Intentional Community Consultant, Hannah Schwartz.

Please see attached invoices, which include detailed descriptions of Hannah's work for Riverflow Community during this reporting period, including continued progress on board development and training, short and long-term strategic planning, donor education and cultivation, fundraising guidance for board, team cohesion, operational and strategic planning, logo/website design and website content development, as well as critical guidance on discerning Riverflow Community's requisite property and residence characteristics, including adherence to all relevant regulations mentioned above.

Hannah, along with her administrative assistant River Parker, planned and facilitated Riverflow's inaugural strategic planning weekend in early January, where the team laid the groundwork for both short-term and long-term planning goals. This time together, and the careful crafting of the agenda, was essential to the progress we have made in these past 3 months, which culminated in the launching of the Rivercommunity.org website, which went live in mid-March. The response to the website has drawn significant interest from both prospective funders and families of adults with I/DD.

6. Update on accountant and the progress of establishing accounting procedures for Riverflow.

In addition to the information provided in answer to question 1 above, the bookkeeper is tracking all invoices and issuing checks as needed, as well as fine tuning Riverflow Community's bookkeeping system. Importantly, as

we begin to raise funds to support future renovations, we have established a Riverflow Community brokerage account in order to receive securities contributions and we have also set up a fiscal sponsorship to receive tax-protected donations in advance of being awarded our 501(c)3 status later this year.

7. Update on administration expenses.

Administrative (and other) expenses for this period include the following:

- Certificate of general liability insurance, as required by ACT 186 Pilot Grant. In the fiscal report, this is listed under the Designated Agency expenses, since we will not be using the DA for accounting services as initially planned.
- Food for Strategic Planning Weekend, and costs for ordering/shipping of strategic planning guidebook to board members. In fiscal report, listed under strategic planning expenses.
- Cost for Zoom platform to facilitate bi-weekly board meeting. In fiscal report, listed under strategic planning expenses.
- Fire marshal permit, listed under administrative expenses.
- Graphic design work for logo, stationary, website and general branding needs, listed under development consulting expenses.
- Pump inspection and pump need planning by environmental engineer, listed under administration expenses.
- IT work for donor tracking system and website technology, listed under Accounting/Bookkeeping expenses.
- In addition to providing administrative support to Hannah, River Parker has also provided essential services that support strategic planning and development. In the fiscal report, listed under the Designated Agency expenses, since we will not be using the DA for accounting services as initially planned.

- Jim Caffry has provided ongoing pro bono legal services during 2nd Qtr.

8. Update and progress on hiring an individual who has firsthand lived experience. Update on how the individual has provided valuable insights and guidance during the development process, ensuring that the housing project meets the highest standards and fulfills the needs of the community.

The Riverflow Community team has continued our discussion of how best to gather input from individuals with developmental disabilities, especially how to meet the challenge of hearing from those adults who have limited ability to express their needs and wants verbally. We anticipate moving forward with this task in the grant fourth quarter.