



## Upper Valley Services Act 186 Pilot Planning Grant Report

### Fourth Quarter Report: 7/1/24 - 9/30/24

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

UVS and Downstreet Housing and Community Development have cultivated a very strong and effective partnership. This partnership has been key to expanding our understanding of the housing development process, funding opportunities, and the strength of our two projects. UVS contributes to Downstreet, through our mission-based commitment and advocacy for the unique and universal housing needs of people with intellectual and developmental disabilities (I/DD). Both organizations look forward to building on the work we have done through this Act 186 Grant to further expand housing options and benefit from the many lessons learned through this work. Additionally, UVS and Downstreet will seek replication opportunities and future initiatives to further our shared vision. Both the Randolph and Waterbury projects are progressing on schedule.

#### **2. Update on Downstreet Housing and Community Development pre-development activities on the Water Street location to ensure progress is being made and there is collaboration, assigning roles, delegation of tasks and effective communication.**

There is much to report on pre-development activities on the Water Street single-family home in Randolph Center.

- All standard pre-development work has been completed.
- Building/zoning permits have been approved by Randolph and Randolph Center for the renovation of the property per the design plans for the primary residence and for a one-unit ADU in the garage.
- UVS received additional Act 186 funds to cover unanticipated investigations related to the home being on the Historic Preservation list and necessitating Archeological Assessment and development of formal easement to cross neighboring property to access town sewer and water for the home and ADU.
- On October 2, 2024, the Vermont Housing and Conservation Board of Directors voted unanimously to approve the funding request for acquisition, rehabilitation, and related expenses for the Water Street renovation project. Gloria Quinn of UVS and Nicola Anderson of Downstreet Housing presented before the VHCB Board. While the cost per unit of housing is greater than is typically funded; the VHCB Board recognized the unique needs and the necessity to increase housing options for people with I/DD.
- UVS is also applying for a Vermont Housing Improvement Plan (VHIP) Grant for up to \$50,000 per unit, (two total) to cover the costs of bringing rental units up to Vermont Rental Housing Health Code guidelines or to create new units, including Accessory Dwelling Units (ADUs). Downstreet provided guidance to these grant applications, and we anticipate an award between \$70 – 100,000.

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### Work Scheduled between 10.1.2024 and 12.31.2024:

- UVS will meet all requirements of the Vermont Department of Historic Preservation (VDHP). Plans were submitted to VDHP in early May for a 30-day review. There have been personnel changes in VDHP requiring a second review which was submitted on 9/25/2024. While awaiting this review, UVS will now proceed with scheduling the archeological assessment of the property. The estimate for this assessment is between \$12,000 – 16,000. This will be covered by the additional Act 186 funding from 10/1/24 – 12/31/24.
- Septic System: The existing septic system on the property is outdated and most likely failing. Our civil engineers have proposed a solution that would have the home tie into a neighbor's forced main system that connects to the town sewer system. The neighbor is amenable to this plan. UVS has incurred costs of \$1,225 for the septic evaluation outside our pilot planning grant budget. Legal fees for the development of easement and shared maintenance agreements will be \$5,000 – 10,000. This will also be covered by the additional Act 186 funding from 10/1/24 – 12/31/24.

### Issues and Concerns Flagged by the Planning Process:

While this will not be a problem for the Randolph residence because UVS will own the property debt free and UVS has a strong and capable facility management team, we still have concerns that without some system change, the operating budget to run a “Reverse Shared Living” home when fully reliant on the unlicensed Room and Board rate of \$814.65 per month per person will not generate sufficient income to cover the full cost of a home when resident owned or rented by the developmental services agency. To lessen barriers to the creation of new housing options, we encourage a thorough exploration of ways to increase funding of housing through changes to the Medicaid Waiver, room and board rates, access to targeted new housing vouchers with Vermont Housing Authority, and direct funding from other sources that invest in the growth of housing required to meet current and projected needs.

We hope that bringing Joe Wykowski, Strategic Housing Outreach Consultant with Community Vision of Oregon can inform Vermont Stakeholders of potential solutions to some of these challenges. This Conference and second day intensive with two new pilot planning groups of UVS families will be covered with the additional Act 186 funding from 10/1/24 – 12/31/24.

### Next Steps:

We engaged the guidance and research of housing, legal, and financial experts to develop the ADU and service supported peer residence concepts. This work will be done within two workgroups comprised of families who seek these new housing models for their adult children and UVS service leaders. Two housing types garnered significant interest: the ADU as part of a potential “reversed shared living” model, and the 3-5 person service-supported peer residence. The goal of the two workgroups is to progress from conceptual understanding to applied work, with direction and consultation provided by Joe Wykowski as well as other financial and legal experts such as Jim Caffrey, Special Needs Trust Lawyer. The two workgroups will create a work plan, target questions, and desired outcomes during the October 18 full day session with Joe Wykowski. This work builds from the August 6<sup>th</sup> UVS Design Charrette that helped to refine and clarify the selection of models that offer the best fit for families and individuals with I/DD. The cost of professional consultation and facilitation is \$25,000.

- **ADU Study Group:** We have three families interested in exploring the benefits and feasibility of an ADU. Grant funds will be used for legal, financial, and building design expertise to examine these

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potential case studies. Questions include design planning; financial modeling; public investments in the ADU and how to access these funds; legal advice regarding ownership, relationship to primary residence, and consideration of converting the primary residence into a reverse shared living that may or may not include a peer, capital and operating budgets for short and long-term – the goal is to more fully explore the ADU to create stable and affordable housing that lessens or eliminates the parents’ caregiving responsibilities while retaining proximity and access to the parent/adult child relationship. It also lessens the disruption and loss of place and familiarity for an individual with I/DD who may struggle with change.

- **Service Supported Peer Housing Study Group:** This study group represents the voices of many families who have consistently envisioned this model but find the scale of the St. Paul Street project to be too big for their community. This group will also require legal, financial, and building design expertise, as well as program development expertise with focus on the financial and legal arrangements that can serve a cohort of families as a private venture as well as in collaboration with a public housing developer. Joe Wykowski, Community Vision, has consulted in 23 states and is a proven leader in housing development for people with I/DD, and with grant funding, he will work with this group toward the development of a business plan that identifies a viable path to ownership such as a condo, co-op or other legal structure and financial plan to operate the property long-term.

### **3. Update on the progress of the housing development documentary.**

This is on track. The video is in the forming status with Skip Whitman gathering additional footage prior to sharing a final draft of the story board. Due to this work's nature, it is heavily front-loaded before having a finished product. We anticipate a draft in late October and a final product ready for the December 6<sup>th</sup> Act 186 Pilot Grant Open House.

### **4. Update on the planning workshops for parents and providers and the benefits it is providing to families to create new and innovative housing projects. How will work include collaboration with architects Ward Joyce, and Taryn Barrett.**

- The Housing Design Charette on August 6<sup>th</sup> was attended by 43 individuals and included 16 parents and 4 people with I/DD alongside design professionals, developers, service providers, and a DAIL representative. Please see the attached summary from this very productive and informative meeting was also critical to the request to launch two new study groups to build on the momentum of this day.
- Parents and individuals were given a gift certificate to a restaurant of business of their choosing (from a regional list) for their participation in the 3-hour charette on August 6<sup>th</sup>, their follow up evaluations, and reflection work.
- Jim Caffery, Special Needs Attorney, has agreed to provide critical information to the “toolkit” and assist with legal and financial questions that may be identified in the two study groups. His time will be funded through the Act 186 \$60,000 in additional funds.
- Technology as a tool to support skill development, build greater independence and self-management in personal care, household skills and routines, medication management, and other applications as needed is something that we have gained a better understanding of. UVS is seeking additional funds to initiate work with Shiftability and GrandCare for up to 12 individuals who have been identified. These individuals have funding for the ongoing monthly software costs of the Shiftability consultation and individualized assessments through the GrandCare platform but do not have funds

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or a mechanism to generate the one-time hardware, staff training, and development required to design, install, interface, and troubleshoot individualized use of this well vetted platform. The one-time cost to get this started is approximately \$30,000 and remains unfunded at this time.

Ward Joyce, Taryn Barrett, Skip Whitman, Ellen Riley, Brice Blaisdell, and Deb Reed are the core members of the Education and Engagement workgroup. This group meets monthly to advance this work funded by the grant.

**5. Update on any unknown fees and services related to the above goals.**

- Grand Care and Shiftability, as previously mentioned, is a key interim step that we can take now with individuals who want to gain greater autonomy in their self-management and independent living skill development. The cost to fund the “starter proposal” that will benefit up to 12 individuals is \$30,000.
- With capital funding secured for the Water Street property, we can forecast needing funding to close any gap between grant funds and actual costs to renovate this property. In addition, UVS will need funds to furnish the property for occupancy. We do not have an estimate for these additional and unfunded costs at this time.

**6. Update on consultation with an individual with lived experience and how they have provided advice and guidance during the development of UVS projects.**

Parents have been actively involved in the preparation for the charette and since this meeting have been in conversations with UVS Housing and Service Coordinator teams to explore what model they see for their adult children and to explore the level of interest and commitment in participating in a future study group. We have at least seven parents at this time who are ready to explore the feasibility of either an ADU approach or work on the development of a service-supported peer residence in a central Vermont community. This work is scheduled to begin with the October 17 & 18 Housing Conference noted above.

Respectfully,



Gloria Quinn  
Executive Director

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October 10, 2024

Julie Abrahamson  
Developmental Disabilities Residential Program Developer  
Vermont Department of Disabilities, Aging and Independent Living  
280 State Drive, HC2 South  
Waterbury, VT 05671-2020

Re: Pilot Planning Grant Q4 Report with Attachment G

**July 1, 2024 – September 30, 2024 Expenses**

**July 2024:**

Water Street Project Design and Documents: \$3,086.03  
Appraisal: \$4000.00  
Phase I ESA and Inspections: \$7725.00

**August 2024:**

Water Street Project Design and Documents: \$5236.03  
Capital Needs Assessment: \$2000.00

**September 2024:**

Water Street Project Design and Documents: \$15,157.37  
Education and Engagement: \$5,232.18

**Quarter 4 Total Expenses:** \$41,063.39

Sincerely

A handwritten signature in blue ink, appearing to read "Gloria M. Quinn", is written over a faint, larger version of the same signature.

Gloria M. Quinn

Att.

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STATE OF VERMONT  
GRANT AGREEMENT

Grant # 03460-6-2605  
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Attachment G  
Pilot Planning Grant  
Fiscal Report

Reporting period

From: July 1, 2024

To: September 30, 2024

<b>Expenses</b>	<b>Budget</b>	<b>Quarter</b>	<b>Year to Date</b>
Water Street house in Randolph	125,500.00	23,050.22	134,156.24
Design for Waterbury Multi-Unit Apartment	10,000.00	3612.72	5540.80
Community Engagement and Educational	18,000.00	8017.12	17,586.30
Professional Videographer	10,000.00	3333.33	6666.66
Lived Experience Consultant	3,500.00	3050.00	3050.00
<b>Total</b>	<b>167,000.00</b>	<b>41063.39</b>	<b>167,000.00</b>

  
Executive Director or Business Manager

Date

10/15/24