

# Homesharing

## A review of Australian and International Homeshare Projects

Prepared for Homeshare Victoria  
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# Introduction

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This literature review has been commissioned by Homeshare Victoria as part of the development of a pilot project to develop and implement a Homeshare project in Melbourne, Victoria.

The Homeshare Victoria Steering Committee is made up of volunteers who have come together to explore and develop a homeshare program in Victoria. The Steering Committee has secured the services of MECWA Community Care as its auspice body, to which grants have been made by philanthropic trusts for the purpose of establishing a pilot program.

The Creative Skill Consultants was engaged in January 2000 to conduct a review of homeshare programs throughout Australia, UK and USA and to produce a literature review and alternative models for the development and implementation of a program. This document provides the review of available literature and current programs. It will be used to develop a Victorian Homeshare model in February/March 2000.

This review has been conducted by the following means:

1. Internet search.
2. Identifying existing Homeshare programs overseas and obtaining detailed documentation and accounts of personal experiences from those who have established and those who are currently staffing Homeshare programs in the USA and the UK.
3. Personal observation of the UK Homeshare program (by Chairperson of Homeshare Vic Steering Committee)
4. Examination of program evaluation reports, coordinators reports and a thesis undertaken in Canada which examines the evolution of Homesharing in Canada.
5. Conversations with Sydney Homeshare staff and Committee.

It must be noted that there is a dearth of academic literature regarding Homeshare, both nationally and internationally. Major academic libraries were consulted and searched, with very little result. Research has therefore, of necessity, been confined to first-hand accounts of programs, and the analysis of program evaluations.

## **Definitions**

As Homeshare terminology can differ between programs, the following terms have been used congruently throughout the document to avoid confusion:

*The person with a home to share is the **Householder***

*The person in need of accommodation is the **Homesharer***

In some contexts the Homesharer has been referred to as a carer. This term has been used loosely, and in no way connotes reduced independence on the part of the Householder.

This review has identified a number of Homesharing programs that have been successfully operating for as long as 15 years, with a string of long term Homesharing arrangements that have developed into close friendships, with ongoing mutual contact long after the contract period has ended.

There have, however, been inherent difficulties in maintaining such programs as evidenced by the cessation of Homesharing programs in several countries, including a rural based pilot program here in Victoria. This report will describe the continuing and discontinued programs to identify elements that will be vital to the success of Homeshare Victoria's pilot program.

# The Homeshare Concept

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A North American concept developed in the early 1970's, Homeshare has been described as an innovative approach to preventing older people from being placed in residential care prematurely or unnecessarily and to providing affordable housing options to younger people. Whilst there are several models of Homeshare, the basic underlying philosophy is the same - independence, personal growth and quality of life through reciprocal sharing of resources.

Jaffe and Howe (1988:318) identify three types of Homeshare:

1. Self governed shared housing - private arrangement between parties with no agency involvement.
2. Agency assisted shared housing - an agency publicises, interviews, screens, matches and monitors progress, but is not present within the home setting.
3. Shared households or group homes - an agency is responsible for the day to day management and running of the home.

For the purpose of this paper, the focus shall be on the second form of Homeshare - the agency assisted shared housing arrangement. This program type aims to enable Homeowners to remain independent within their own home, by receiving high-calibre, low cost care and support from a sharer.

The Householder, who is often frail or suffering some form of dementia (approximately 33% of UK Homeshare Householders (Bhandari:1999)) feels a sense of security by having someone in the home overnight and is relieved of some of the household tasks that have often become difficult or impossible. This arrangement can further support those elderly at risk, by the presence of another person in the house to check the gas is turned off, to ensure the doors are locked and that medication has been taken (although Homesharers do not generally administer medication). Additionally there is peace of mind for the Householder, their families and other carers that someone is there to assist in a medical emergency or other crisis.

Similarly, the Homesharer benefits from the program by obtaining reduced rent or rent free premises. They have their own room and shared use of common living areas in exchange for undertaking tasks such as shopping, transportation, cooking and house cleaning. Whilst there are certain restrictions placed upon the Homesharer in respect of and to protect the older person and his/her home, the Homesharer is still able to pursue a social life in addition to study and work. Not only does the Homesharer have the opportunity to save money, but also is able to experience the sense of security and homely atmosphere that comes with sharing in an already established home.

Homeshare programs have tended to attract students, especially exchange students and those on working visas. The mutual exchange of life experiences, cultural differences and companionship has often proved to be enriching for both parties and resulted in some long term friendships.

As illustrated by the International Homeshare Association (date not supplied), Homeshare is not limited to matching older people with students. In some programs matches are also made between:

1. two older people (sharing costs of living, mutual companionship)
2. single parents (sharing living costs, sharing child minding, mutual support and companionship)
3. an older person and a single parent (sharing living costs, child minding, support and companionship)
4. an older person and young adult/couple (assistance with household tasks, companionship and for the Homesharer(s) free accommodation)
5. an older person and a young adult (full or part time care provided by Homesharer in exchange for free rent and a wage).

In an American study of Homesharing, the primary reasons for people wishing to enter into the program were found to be financial savings(44%), companionship (21%) and the need for health care and household assistance (19%). Almost one third of Householders were frail and almost half the sample studied, indicated the development of moderate to strong levels of friendship with the Homesharer (Pynoos, Hamburger & June, 1990).

# Why Homeshare?

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## Australia's Ageing Population

The designation of 1999 by the United Nations General Assembly as the International Year of Older People illustrates the world-wide importance of the need to address issues regarding our ageing population. The Commonwealth Government, as part of its response to this initiative, developed a National Strategy for an Ageing Australia, which focussed upon four themes:

*Firstly, helping Australians to be independent and to provide for their later years through employment, life long learning and financial security. Secondly, delivering quality health care through new approaches to service delivery, coordinated care and independent living. Thirdly, improving attitudes towards older people and ageing, lifestyle issues such as personal safety, housing, transport, recreation and community support. And fourthly, encouraging healthy ageing and the role of general practitioners in maintaining wellbeing of older people. (John Howard, quoted in Bishop 1999).*

The structure and size of the older population of Australia has changed considerably, with a rapid increase between 1981 - 2001. In particular the population of people aged 80+ years increased by an average of 4.1% per year (Australian Institute of Health and Welfare, 1999). Advances in medical technology, improved living conditions and social support, and the ageing of the baby boomer generation have all contributed to this increase.

The Australian Bureau of Statistics estimate that the population of people aged 65+ years in Australia will increase from 2.3 million in 1998, to 4.0 million in 2021 and 5.8 million in 2041. (ABS 1999 Population Projections Series K). Such a large population of older people will require new and innovative ways of providing accommodation, health and security to meet the specific challenges of ageing.

The social and workforces structures of Australia have also changed dramatically over this period. Increased rates of female workforce participation, high divorce rates and the increasing number of single person households all contribute to the need to change the traditional structure of support available to our older population, as the volunteer labour numbers decrease and the support needs increase.

Furthermore, the ABS has identified that of those older people who have a profound or severe core activity restriction (regarding self care, mobility and communication), 22% of those aged between 65-79 years live alone (ABS Survey of Aged Persons 1993). It is this group who are most likely to benefit by becoming householders in a Homeshare project.

## **Residential versus Home-based care**

The past two decades have seen a swing in government policy with institutionalisation giving way to community and home based care. Greater demand has been placed upon the community sector and relatives (especially women) to provide care and resources to elderly and disabled relatives.

Furthermore, increased numbers of people with mental health issues and disabilities have been housed in the community, placing greater demand upon public housing resources. Such housing is often poor quality and in great demand with huge waiting lists. It is not always centrally located, thus access to the community and services can become difficult (Audit Commission National Report).

In light of these emerging trends, the time has never been better for developing an alternative model of care. The focus in the past has been too heavily concentrated on interventionist models, rather than preventative ones and what is required now (according to the Audit Commission National Report on The Role of Housing in Community Care) is an integrated approach from all social, housing and health services in developing best Practice Principles regarding service review, consultation, target setting and performance monitoring. The need is to fund low cost, high calibre support. And with ever increasing emphasis and social value placed upon the attainment and ability to retain independence living *at home* appears to be the preferred option to living *in* a home (White and Groves, 1997).

Oldman and Quilgars (1999) discovered in their comparative study of older people living in residential settings and those receiving home based care, that social isolation and loss of control can be experienced by both groups.

So how do we define 'home' or 'independence'? The answer to this is likely to be subjective depending upon the perceptions and needs of the individual. For many of us, home is a place of belonging that encompasses a sense of familiarity, memories, experiences, identity, control, security, privacy and dignity. Similarly independence may be linked to self identity, control, choice, dignity and security. Independence is highly valued and sought after in our society, whilst dependence is generally feared.

White and Groves (1997: 83-89) investigated the elements which older residents living in the community perceived as being important to retain independence. Respondents referred to their independence as representing their ability to take care of themselves, to valuing space around them (as opposed to being "pushed into one room"), to not being dependent upon others for their needs. Independence was also described as sometimes involving prioritising and compromises, such as putting up with poor health and/or poor conditions in order to remain living independently; learning new skills (because there is no one else to do it) or choosing to live alone rather than compromise independence.

Another key finding of this study involved the consistent reference to reciprocating assistance. In other words, the respondents placed enormous emphasis upon the importance of paying either in kind or monetarily or in some other valued way, for assistance rendered. Not only does the older person benefit by receiving assistance, but those assisting also benefit by the older person (for example) offering child minding, watching over a neighbours property whilst away or offering practical skills or payment. This reciprocal assistance was perceived as essential to maintaining independence as it empowers the older person to mediate and control the assistance.

They conclude that reciprocation underlies what may be termed 'interdependence'. Interdependence is not a loss of independence, but rather the development of a support network of reciprocal relationships that foster strength, control and value for both parties.

### ***An option for remaining 'at home'***

Whilst the above research findings provide us with some useful information and some groundwork to further build upon, no concrete conclusions can be drawn regarding the needs of older people. Needs are



subjective and changeable and must be addressed within the contexts of the individual, neighbourhood, and wider community.

There is a suggestion, however that many older people value their independence and the degree of control and decision making powers they have in their lives above everything (including their health). Whilst the concept of Homeshare is not going to suit everyone, there are some who have and are currently reaping the rewards of such an arrangement.

Homeshare in essence is a much more enriching method of remaining at home than relying upon occasional visits from family and other carers, personal 'medic alert' type alarms and other service providers. Whilst formal support services may still be required (Homeshare aims to complement existing services not replace them) during a Homeshare arrangement, this type of support does not have the added value of providing ongoing, informal support, especially overnight. Furthermore, the opportunity for reciprocity is very limited in a more traditional home care program.

With Homeshare operating within a framework of reciprocity, independence is more readily maintained and enhanced. Furthermore, this program is considered to be a cost effective option, not only for the Householder and the Homesharer, but also for policy makers.

Whilst Johnstone (1999) identifies an apparent slump in the growth of Homesharing during recent years, there is little doubt that this still remains one of the most viable options for enabling older people to remain in their own home.

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# Current Models of Homeshare: UK, USA & Australia

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## Introduction

There are several different models of Homeshare operating throughout the world. Some programs have folded due to funding woes, lack of support and difficulties with finding suitable participants, some are barely surviving and yet others continue to operate successfully. Despite the differences in experiences, the following countries have all recognised and embraced the ideal of Homeshare: America, England, Austria, Canada, Czech Republic, Germany, Israel, Spain and Australia.

In view of the numbers and diversity of programs operating within and between these countries, it became apparent that there was a need to establish links between them and create an international focus. Subsequently, the Homeshare International Association was established as a means of linking Homeshare programs worldwide and promoting the Homeshare concept via a network of founders, coordinators and interested others sharing ideas, experiences, information, research and support.

## The Programs

Clearly, it is not within the scope of this paper to review every program. Therefore, the following is an overview of the UK model, several US models and an Australian model with a comparative critique at the end.

## The Community Care Trust Homeshare Scheme, UK

### Introduction

Homeshare in England began in 1985 as a result of Nan Maitland (a social worker) visiting two successful Homeshare schemes in the USA and wanting to set up a similar scheme in England. Due to the success of this scheme and in response to demand Ms Maitland established The Community Care Trust (a registered charity) in London in 1993 to provide funds for additional Homeshare schemes.

The Householder offers accommodation and a share of the home's facilities in exchange for the Homesharer providing security by sleeping in the house at night and helping with shopping, gardening, cooking, cleaning and other maintenance type jobs totalling 10 hours work per week.

The Homesharer is often a student, worker, or from overseas and in need of accommodation. Homesharing provides them with a low cost and secure accommodation option, whilst enabling the Householder to remain in their own home, retaining their independence and quality of life.

Another aspect of the scheme which has been equally successful has been Homesharing for people with dementia, whereby the Homesharer works with other care providers and family members in a holistic, joint approach to the provision of care. More than half of our Householders suffer from some form of dementia, with the majority aged between 80 and 90 years.

Homesharing is a personalised service that is based upon the old fashioned barter principle of exchange for mutual benefit. The process is monitored and evaluated to ensure effectiveness, whilst the scheme itself is continually reviewed and refined in accordance with individual needs.

One of the policies of the Trust is to have a current or past service user on the board of trustees.

### ***Philosophy***

The Community Care Trust Homeshare scheme is centred around the home and the importance of older people being able to remain within their own homes as long as possible. It focuses on the mutual exchange between the Householder and the Homesharer, not only in a practical sense, but also in terms of the intergenerational sharing of ideas and experiences, the caring relationship that evolves as well as the “flow of wisdom down the generations”.

The success of Homeshare is dependent upon 5 key principles:

1. An initial accurate assessment of the Householder
2. Scrupulous vetting of Homesharers
3. Careful matching of both parties
4. A coordinator who can empower and support the match
5. Imaginative problem solving

### ***Eligibility***

Both Householders and Homesharers come from diverse backgrounds, bringing with them a wide range of life experiences, skills, personalities and beliefs. For example, Householders have been able to assist foreign students with their English skills and customs, whilst providing a secure ‘home away from home’ environment. Furthermore, Householders may learn about other cultures, in addition to receiving companionship and assistance where needed.

### ***Homesharers***

Homesharers are almost all over 25 years of age, single people and couples usually furthering their education or careers. They are of various nationalities (including a high proportion of Australians) and from a diverse range of occupations, generally on working holiday visas. Despite their differences Homesharers all share one common thread, a commitment to helping others.

Potential Homesharers must:

- ◆ be aged over 25 years
- ◆ undergo interviews
- ◆ provide two recent referees, such as current and/or recent employer, lecturer etc. (not friends or family)
- ◆ undergo a trial period for the first month of the Homeshare arrangement
- ◆ undergo ongoing assessment
- ◆ attend monthly Homesharer Group Training meetings and utilise the information, training and support provided by the Trust.

## *Householders*

Potential Householders must:

- ◆ live within the vicinity of the Homesharing scheme
- ◆ *want* to Homeshare and not be influenced by others
- ◆ not have special or extensive care needs that require specialised assistance, as this is not within the realms of the Homeshare scheme
- ◆ provide accommodation and facilities of an acceptable standard
- ◆ not have unrealistic expectations of the Homesharer in terms of the nature and hours of work per week.

## ***The Homeshare Contract***

The Trust is responsible for organising matches, monitoring the Homeshare arrangement, ongoing support and conflict resolution and evaluation. The contract is made between the Householder and the Homesharer and not the Trust.

If for whatever reason either party is dissatisfied with the Homeshare arrangement within the trial period, the contract may be terminated with one week's notification. After the trial period one month's notice is required and if there is a serious breach of the contract it may be terminated immediately.

## ***The Process***

The following process is used in matching Householders to Homesharers:

1. Following an enquiry, an appointment is made to interview the potential Householder who fit the criteria of seeming suitable and genuinely interested, live within the boundaries of the program, are offering an acceptable standard of accommodation and do not require special or extensive care needs.
2. Interview Householder, create profile (including personal details, life experiences, personality, likes and dislikes, interests, motivation for wanting a Homesharer etc.) and accept or reject.

In order to ensure compatibility the following areas are discussed:

6. needs
7. cooking (who, how often, type, times?)
8. shopping (who, where, when and who's car?)
9. housework (how much, how often?)
10. laundry (at home or laundrette, responsibilities)
11. sleepover (every night?, curfew at night, covering for weekends?)
12. evenings and weekends (Saturday is usually shopping, cleaning etc. day, Sunday is usually a 'day off')
13. companionship (how often, how intimate?)
14. personal care (type [ie. assisting with showering, cutting nails etc.] and how often?)
15. outings (type, frequency)

16. gardening (type, frequency, who pays for materials?)
17. driving (whose car , check Householder's insurance cover, licence?)
18. Pet care (feeding, walking, cleaning, allergies?)
19. More paid hours (ascertain what type of work/pay arrangement is required ie. part pay, part barter?).
3. Select Homesharer (from files or recruit new) and send their profile (including personal details, experience, skills, personality, likes and dislikes, motivation for Homesharing etc.) to the Householder.
4. Arrange an introduction between both parties.
5. Organise move in (where both parties satisfied) after checking references.
6. Draw up contract between Householder and Homesharer, incorporating the requirements outlined in point 2., as negotiated with the Homesharer.
7. Monitor and record:
  20. telephone contact day after move in to ascertain satisfaction
  21. create file and record match in centralised records file
  22. if social work referral - advise social worker
  23. telephone contact at end of first week
  24. home visit within first month
  25. at end of match, send evaluation form and rematch if requested

### ***Evaluative changes***

Since its inception The Community Care Trust Homeshare scheme has moved from a pilot project to a fully established and successful program with national and international recognition. The program has extended from Richmond, Kensington, Chelsea, South-West London, Westminster and Camden to North London, Islington and Hackney as well as a satellite scheme serving South-West Hertfordshire.

The Community Care Trust have also developed its procedures and policies including:

- ◆ Revision and testing of The Best Practice Manual for use as a training instrument for new coordinators
- ◆ Regular meetings of Coordinators to discuss referrals, caseloads and problematic matches.

Other changes have included the introduction of a modest user pays system in early 1997, following the recommendation of an evaluation report undertaken by the Social Policy Research Unit of the University of York. Furthermore, negotiations with the Royal Borough of Kensington and Chelsea have led to the development of a legal framework within which Homeshare arrangements may be purchased from the Trust.

These charges and fees contribute to the funding of Homeshare, but are not sufficient in themselves to maintain the full costs of the service.

### ***Homeshare fees***

Householders and Homesharers contribute a set fee per month to the Trust. In cases of financial difficulty, there may be a reduced charge or no charge at all.

As the arrangement is rent free, no money changes hands between the Householder and the Homesharer.

*(The Community Care Trust Homeshare Annual Review 1997; The Community Care Trust Homeshare Coordinator's Manual, 1997).*

## **The Elsie Ehrenfeld Housing Project for Older People,**

### **Jewish Community Services, Melbourne Australia**

#### ***Introduction***

The Elsie Ehrenfeld Housing Project has been in operation since July 1997 and during this time has successfully provided alternative accommodation to elderly Jewish people. The Project offers a choice of accommodation models including the 'Live in Accommodation' approach, which is similar to Homeshare, whereby two people are matched in a shared living arrangement, and the 'Share Accommodation' approach involving three or more people sharing a dwelling that is rented by the group. And for those people who are reluctant to participate in either of these arrangements, there is the 'General Accommodation' approach, whereby clients are linked into emergency accommodation services (Council), the Department of Human Services, very cheap private rental accommodation or other services specific to the needs of the individual.

Some matches have been in place for over two years and yet others have varied considerably in length. Most matches have terminated due to the Householder requiring residential or hospital care or as a result of the Householder dying.

The Housing Officer has found that Householder demand always exceeds Homesharer supply.

#### ***The Models***

The Project recognises that many older Jewish people:

- ◆ live alone in large houses that are difficult to manage
- ◆ live with their adult children as they are unable to afford independent accommodation
- ◆ have difficulty managing private rental prices.

In view of these issues, the Project offers options to improve upon current living conditions, whereby individuals are provided with an affordable housing option that offers social interaction, companionship and security.

#### ***Live-in Accommodation***

This approach reflects the fundamental principles of Homeshare, as it involves carefully selecting an individual to share residency of an older person's house/unit, whilst providing care and duties in lieu of rental payment. The nature of the arrangement is one of mutual exchange, with the finer details being negotiated on a case by case basis.

The process of matching Project participants involves identification of the needs of the older person ie. companionship, assistance with household duties or a comprehensive level of care and then selecting a co-resident that is best able to meet the identified needs.

### *The Process*

Following receipt of a referral into the Project, the Housing Officer makes contact. A meeting is arranged either in the office or at the client's residence. This is followed by a series of home visits. The next stage involves negotiation between the relevant parties regarding expectations, tasks, rights and responsibilities. Once parties enter into an arrangement, the Housing Officer provides ongoing support by way of telephone contact and visits to the residence in the first week and thereafter as required by the clients.

No specific recruitment process is used for finding Homesharers. Potential Homesharers are sought when this type of arrangement is considered as best suiting the needs of the Householder. Most Homesharers are middle aged to elderly.

### *Share Accommodation*

This approach aims to unite people with similar accommodation needs in a group residential setting whereby each party equally contributes to the upkeep of the household.

Those people most likely to benefit from this approach are single or living with adult children or living in another unsuitable situation.

Participants must have some form of income and be physically independent.

### *The Process*

Following receipt of a referral into the Project, the Housing Officer makes contact. A meeting of the potential share partners is arranged. The next stage involves securing appropriate accommodation that best suits the needs of the clients. All parties must then negotiate rights and responsibilities. Once parties enter into an arrangement, the Housing Officer provides ongoing support by way of telephone contact and visits to the residence in the first week and thereafter as required by the clients.

### *General Accommodation*

This approach provides options to those people (mostly couples, but some singles too) who do not wish to participate in a 'Live-in' or 'Shared' accommodation program. Each client is assisted on an individual basis to ensure specific issues and addressed and needs are met.

Often this group of clients are not in a position to seek further assistance from their adult children and in some cases are estranged from their adult children. Similarly, peer networks are often limited. Such a situation results in these clients having minimal options and support.

### *The Process*

Once the needs of this client group are determined on a case by case basis, the Housing Officer identifies emergency accommodation options and then aims to link clients into such services. This can be a challenging task as the need for accommodation is often quite urgent, with time and resources being

limited.

### **Strengths**

The Elsie Ehrenfeld Project has demonstrated high success rates in each of the approaches outlined above. This may be attributed to numerous factors, such as the Project's ability to develop strong networks with other service providers, negotiate access to other housing options within the target area, and the flexibility of providing a multifaceted approach that allows clients to choose a housing option that best suits their needs.

The overall strength of the housing program, including the Homeshare component, is that it is part of an integrated range of community support services in a generalist agency for a specific community, in this case the Jewish community. This has led to the implementation of some innovative solutions to a wide range of accommodation problems. For example, a professional family with young children were looking for 'live in' help and support for the children and at the same time an elderly man was finding it stressful to live with his son and family and was seeking an alternative option. Both parties with their distinctive needs and issues were matched and the arrangement has proven to be a great success.

Yet another strength, has been the Project's ability to address client's needs using a holistic approach. The Housing Officer has achieved this by extending her role to include coordinating community access, whereby clients' needs (other than housing) are assessed and appropriate strategies implemented. This may involve providing assistance where able or referring the client on to another service with expertise in the area of identified need.

Finally, the Homeshare aspect of the Elsie Ehrenfeld Project has enabled Householders to remain living in their own homes for an extra one to two years.

## **San Francisco Homeshare, USA**

### **Introduction**

San Francisco Homeshare, whilst being similar in terms of process and documentation to other Homesharing programs, is a program targeted towards seniors. Matches are arranged by the Coordinator, who offers guidance and support throughout the life of the contract.

Generally senior Householders are matched up with seniors, but may also be matched with younger individuals who wish to live with an older person.

### **Eligibility**

#### *Homesharers*

Homesharers are single people who are seeking a more affordable housing option within San Francisco. They are offered a bedroom and shared use of other common living areas in exchange for rent or up to 15 hours of non personal assistance per week. Tasks include cooking, housework, transportation, companionship and running errands.



## *Householders*

Householders are older people living alone with room to spare in their home and a desire to share their home with someone in exchange for rent or non personal service.

### ***The Homeshare Contract***

Prior to both parties entering into a contractual agreement, they are encouraged to discuss the various aspects of sharing to ensure a clearly defined understanding of rights and responsibilities. Experience has shown program staff that the success of a match is dependent upon open and honest expression of the following issues:

#### 1. FINANCES

26. Amount of rent / deposit details and date due

27. Are utilities included in rent? if not, determine who pays for what or what share

28. Other costs (pool/gardener/cable TV etc.)

29. If a telephone is shared how will the bill be divided fairly?

#### 2. CLEANING

30. What areas are to be cleaned jointly and when?

31. Who will clean the bathroom and how often? (if shared)

32. Who purchases bathroom supplies? (if shared)

33. Agree to a reasonable amount of time for one person to remain in bathroom (if shared)

34. Cooking/dining schedule

35. Where can food be stored separately?

36. Who is responsible for cleaning the kitchen and how often should appliances be cleaned

#### 3. MEALS

37. Is food shared or kept separate?

38. If shared, how is the cost divided?

39. Who is responsible for shopping (and how often), cooking and cleaning?

40. What supplies can be shared and who will provide them?

41. Is it ok to leave dirty dishes in the sink?

#### 4. LAUNDRY

42. If washing machines are shared, at what times should they be used and how often per week?

43. Who supplies laundry products?

44. Can personal laundry be done in the sink/bath?

45. Where can clothes be hung to dry?

46. Can clothes be left in the dryer?

**5. OTHER ROOMS**

47. What is supplied in the sharers bedroom?
48. How much furniture can sharer bring and where can they place it?
49. Who supplies linen?
50. What storage areas are available to the sharer?
51. What other rooms are to be shared by the sharer and how tidily must they be maintained?

**6. OTHER ISSUES**

52. Must doors and windows always be locked?
53. If TV is shared, what is to be watched, for how long and how loud?
54. When are quiet times preferred?
55. How often for entertaining and are visitors permitted to stay overnight?
56. Can music be played/how loud?
57. Car parking arrangements
58. If only one has a vehicle, what can the other party expect in terms of transport assistance?
59. Make rules regarding alcohol consumption, smoking and pets on the premises.

***The Process***

The process involved in matching potential program participants involves:

1. Conducting phone interview with potential Homesharer.
2. Organising an interview in person in a location other than the home to be shared and ensure a third party is present.
3. Organising a second interview in the home to be shared and ensure a third party is present.
4. Checking references thoroughly.
5. Once compatibility is established, a trial period is arranged before any contractual commitment is made.
6. During this trial period Homesharers are to only bring essential items and not all of their furnishings. If the match proves to be unsuccessful, the Homesharer must leave the premises at the end of the trial period. If the Homesharer does not cooperate with this agreement, he/she will no longer be eligible to receive assistance from the Homeshare program.
7. If a match is found to be suitable, an appointment is arranged for both parties to complete a Living Together Agreement or a Rental Agreement.
8. The Homeshare coordinator will provide ongoing support on request. It is the responsibility of the Householder to inform staff of any problems, needs, changes to or ending of the agreement.

Once again, the Homeshare documentation is quite extensive in terms of screening, agreement specifics, legal issues, rental agreement, termination, and policies such as confidentiality and equal opportunity.

## **Homesharing Northwest Counselling Services, Ohio USA**

### ***Introduction***

Northwest Counselling Service's Homesharing program was established in 1985 and is based upon a similar model in California with an intergenerational focus.

Approximately seventy people are matched per year. Weekly, monthly and yearly statistics are recorded regarding numbers of people matched, their age, gender, race, income, disabilities etc. There has been no overall evaluation of client satisfaction, however, staff can cite a number of individual cases that have had successful outcomes.

Staff network with and promote the Homesharing program to a wide range of health and welfare and aged organisations, educational and general public facilities, and the media.

### ***The Homeshare Contract and Legal issues***

Both parties enter into a joint agreement detailing specific requirements, rights and responsibilities of the Homesharing arrangement. They are asked to sign a release of information and release of liability at each interview. Whilst such documentation is not legally water tight, clients are advised that they are entering into a voluntary arrangement within a voluntary program and that it is in both their best interests to make it work.

### ***The Process***

There is a stringent screening process for participants and once a match is made, staff undertake a three month and a six month follow up. If either party is dissatisfied with the arrangement, staff offer mediation to allow both parties to express their concerns and reach amicable compromises. In the event of this process being unsuccessful, either or both parties must give thirty days notice of intention to terminate the arrangement.

### ***Issues***

Homeshare staff have found that there are always more older adults with a home to share than younger people seeking shared accommodation. This anomaly is associated partly to a good economy and that American culture values independence and younger people would rather spend more money to live alone, than save money sharing with another person.

## **Home Share Connection - ElderHelp of San Diego, USA**

### ***Introduction***

Elder Help of San Diego is a non-profit agency that provides a wide range of services. Their Homesharing program *Home Share Connections* matches up Homeowners with people who are looking for affordable housing. Homesharers either pay a modest rent or provide services in the home in lieu of rent. Services may include cooking, shopping, housekeeping, companionship and a commitment to stay overnight at the home at least six nights per week.

There are a range of levels of service to choose from:

60. 7 hours per week in exchange for a room

61. 14 hours per week in exchange for a room and food (approximately \$45-50)

62. 34 hours per week in exchange for room, food, plus \$140 salary per week or \$160 for caring for a couple.

Both parties may negotiate the level of service exchange when developing the Housemate Agreement.

### ***Eligibility***

#### *Homesharers*

Homesharers are generally aged between 45 and 65 years. In order to be eligible for providing shared housing, the Homesharer must:

63. want to participate in the program

64. demonstrate stability, reliability, good communication skills and no current substance abuse

65. provide references to verify residential record, previous employment and suitability for the program

66. provide ID, driving record and signed statement of no criminal history

67. be physically independent

68. respect Householder's privacy and keep personal space clean.

#### *Householders*

Householders are generally aged between 76 and 84 years.

The Householder must:

69. want to participate in the program

70. maintain a safe home

71. be willing to share common living areas

72. respect the Homesharer's privacy

73. advocate for self independently

74. notify staff of match status and if and when a match ends.

### ***The Process***

The process of applying, interviewing, screening and matching is similar to other programs, therefore it is not necessary to detail this again. However, what is interesting about this model of Homeshare, is the range of options available to both parties, in terms of level of care and associated benefits. The Householder may request the level of assistance they feel that they require and in return a suitable Homesharer is not only offered free accommodation, but is also compensated for the work they undertake.

## **The National Shared Housing Resource Center, USA**

### ***Introduction***

The National Shared Housing Resource Center (NSHRC) is a non profit organisation that coordinates homesharing programs in more than 200 communities nationally and acts as a clearinghouse for enquiries. There are 8 regional coordinators ensuring home share programs are accessible in every American State. The NSHRC relies upon the efforts of volunteers in providing technical support for program development, problem solving, literature based marketing strategies, site visits and a national conference.

Information regarding home sharing programs is stored and maintained in a national directory. This directory contains more than 350 programs nationwide. Allied organisations and other interested people are informed of shared housing developments via:

75. a bi-annual newsletter containing information, current trends, relevant legislative information and changes, creative marketing and fund raising ideas
76. manuals and guides for financing, developing, establishing and evaluating home share programs
77. video resources.

### ***Philosophy***

The NSHRC values independence and promotes shared housing as an affordable alternative that enhances health and well being and provides an alternative to unnecessary institutionalisation. Shared housing also “preserves neighbourhoods and saves housing and healthcare dollars”.

### ***The Models***

NSHRC provides two housing options:

#### ***Group shared residences***

The group shared residences programs involve a number of older people living cooperatively as an unrelated family in a large home. These shared dwellings are centrally located close to community activities, transport and churches and can contain as many as seven private bedrooms and facilities to ensure comfort and enjoyment.

This model offers a cost effective, safe and secure housing alternative for seniors who choose to not live alone. Each home is run by a house manager who is responsible for meal preparation and housekeeping.

An example of this model is Senior Home Sharing Inc. situated in Lombard, Illinois. It does not have an intergenerational focus, but is more for older people who cannot or do not wish to remain in their own home.

#### ***Match-up programs***

The match up programs involve assisting home owners in finding a suitable sharer, who either pays rent or provides services for reduced rent. Both parties retain their independence and are able to care for themselves.

Some models match up two older adults and others are based upon intergenerational exchange, whereby the homeowner is an older adult generally living alone with extra space in their home to offer a student or young professional. An example of this model is *Housemate Match* in Atlanta, Georgia.

### ***Housemate Match, Georgia USA***

Housemate Match is non profit, non sectarian and has been sponsored by the Atlanta Jewish Community Center since its inception in 1984.

Unlike the UK model, the Homesharer always pays rent. It may be reduced for work undertaken around the house, but the arrangement is never rent free. This is because experience has taught staff that rent free arrangements end in disaster. Often the Homesharer does not carry out the tasks agreed to in the contract, especially if they have taken on full time employment and yet they continue in this arrangement rent free and responsibility free. This situation is especially difficult when the older person is depending upon the younger person for meals and they are not forthcoming.

This model has been found to be highly successful. Not only does it provide cheaper accommodation and a 'homely' atmosphere for the younger sharer, but it also offers the Homeowner companionship, financial assistance through payment of rent and assistance with difficult tasks.

Matches have been found to last longer in intergenerational matches, with the average stay being as long as two years. This is attributed to the fact that younger people are less demanding and have no furniture to try to fit into the already established home. They are more willing to help with household tasks and often exude the enthusiasm and energy needed to brighten the lives of older people who are depressed. Contrarily, matching two older people (whilst in many cases is also successful) can in some instances create problems regarding placement of furniture, expectations of responsibility, and placing someone who is 'set in their ways' with another who is also 'set in their ways'. This has been known to lead to disputes regarding the running of the household and the intrusion of personal space.

### ***The Contract***

The Homesharing contract, process and associated documentation is along the same lines as other programs.

### ***Eligibility***

#### ***Homesharers***

There is a lower age limit of 18 years, but the majority of Homesharers are between 25 and 29 years of age.

Potential sharers must come to the office for a personal interview and provide three references of employer, landlord and a personal friend they have known for more than two years. They must also supply a picture ID and income verification.

References are then checked and screened. Ongoing support is provided by staff throughout the matching process.

### *Householders*

The lower age limit is 60 years ranging to mid 90's. Every home is visited by a counsellor before a client is referred, to ensure that the premises are suitable and that the Homeowner is independent enough to manage a Homesharer.

Householders are generally people who are seeking the companionship of another person, could benefit from assistance with household tasks and/or payment of rent.

### **Homesharing Fees**

Housemate match does not charge fees but as a non profit organisation, asks for contributions up to \$50 (U.S.) from participants under 60 years of age and a contribution of their choice from participants over 60.

### **Program Summary**

The above examples of Homesharing programs demonstrate the diversity of existing Homeshare models and the potential for further innovative model development. And whilst these programs are just the tip of the iceberg, they are useful in illustrating a range of ideas and strategies to guide future Homeshare developments.

The majority of the programs discussed thus far, have a common thread or strength, and that is the stringency of the vetting process in determining suitable program participants. Maybe the (apparent) non existence of any serious incident occurring in a Homesharing situation, is due to the comprehensiveness of this screening, checking and interviewing process.

Yet contrarily, one of the major differences noted thus far, is the issue of fee for service. Some program staff cringe at the idea of paying a set fee for participation in Homesharing and yet again others abhor the idea of money changing hands between the Householder and the Homesharer for services rendered. There has been no substantial research evidence found to support or discount either method. This is an issue that must be decided in the development stage of a Homeshare model, with a view to incorporating the best option to meet the needs of the target groups within the context of the area in which the program is being established.

Despite the differences between models of Homeshare, staff of existing Homeshare programs have illustrated numerous success stories and reinforced the need for such a program, not only to assist those directly involved, but to provide another option to complement and support other housing and care related programs and services.

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# Homeshare: Evaluative Outcomes

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Homeshare Victoria is in an advantageous position of being able to study the many varied models of Homeshare in existence as well as examining evaluation reports as a basis for program development. One such report is an external evaluation of The Aged Co-Residency Pilot Program operated by CoCare Gippsland and Quantum Community Care Inc.

This pilot program commenced in July 1996 and ran for 9 months. Despite best efforts in terms of planning, process and publicity, at the end of this period the program consisted of one functioning match, with no householders awaiting selection, and 10 potential homesharers awaiting placement.

A formal external evaluation was carried out by Dodd (1997) who found that there were several issues inhibiting the success of this program. They are summarised as follows:

1. The concept of a stranger entering an already established household with a person that is set in their ways is a more challenging arrangement than moving into a shared housing situation where both parties are involved in the establishment of the house. Basically the Sharer is required to 'fit into' the Householder's 'space' and routine. This can be a daunting prospect that may have deterred potential participants.
2. This program has demonstrated the need to ensure involvement of the Householder's family in planning the arrangement and to ensure all relevant parties (Householder, Homesharer and family members) needs and expectations are identified and acknowledged. Relatives felt concerned about the Householder's safety and the Homesharer's ability to fulfil specific requirements. There may be a myriad of reasons for this apparent ambivalence, from inadequate program design and strategies to deal with such issues, feelings of guilt on the part of the relative because they are unable to provide daily care and support or a fear of being 'replaced' and perhaps even disinherited. Whatever the reasons, it is imperative that relatives are actively involved and informed throughout the Homesharing process.
3. In regard to partnership approaches to the development and delivery of Homeshare programs, it was found that both organisations (or the organisation and committee) must ensure an agreed, joint approach to identifying and documenting priorities, purpose and objectives. In other words, there must be a common vision and focus.
4. Whilst the marketing strategies employed were quite extensive, they had limited success in engaging older people from the community. Greater emphasis was placed upon how the potential Homesharer could benefit, rather than the Householder. Both groups need to be equally targeted by program publicity, including clearly defined benefits for each.
5. In terms of program management, both organisations must express their expectations and collaboratively set targets throughout the development process to ensure that they are staying on track. Aims and outcomes must be clearly agreed upon and both organisations aware of their individual roles and responsibilities.



6. In terms of eligibility, there were long delays with assessment due to potential participants undergoing residential treatment or care during the assessment period. This led to difficulties in reaching a conclusive decision regarding suitability, especially as family members also became concerned with the Householders suitability. This was further exacerbated by fluctuations of health and ability.
7. The issue of the method by which potential Homesharers are recruited was recognised in this evaluation as impacting upon the success of the program. Whilst the preferred method of recruitment for some programs is on a case by case basis (for example the UK model which advertises for a suitable match as a need arises), this program recruited a core of volunteers. These volunteers then underwent a process of selection and training, which required a high degree of motivation and commitment. Unfortunately, placements were not forthcoming and as expressed by Dodd (1997) unless volunteers are productively engaged in the early stages, enthusiasm wanes.
8. Whilst this program could not conclusively support the notion that Homesharing is the most cost effective alternative to residential care, Dodd (1997) concludes that this is more likely to be the case than not.

In Thornton's (1995) evaluation of the Community Care Trust Homeshare Project in the UK, she has identified specific areas that impact upon the effectiveness of such a program. Her findings may benefit newly developing schemes through awareness of effective and ineffective strategies. The following is a summary of some of her major findings and recommendations:

1. The importance of developing strong networks with social service front line workers, the voluntary sector and other key stakeholders as a means of determining the level to which these potential referrers understand and value Homeshare and their associated expectations.
2. Mostly, the Trust relies upon fees from program participants (although this may be reduced or non-existent if it is perceived as causing financial hardship), donations, grants and voluntary labour. Thus, pursuing funding is a major aspect of managing such a program and with the costs of organising and supporting a match, is vital for any Homeshare program's survival.
3. An approach that fosters a sense of the program 'belonging' to everyone involved can encourage participation in the behind the scenes running and promotion of the program.
4. Sometimes the 'barter system' extends to employed and volunteer program staff, whereby they are provided with free accommodation in exchange for specialist skills in administration. Similarly, Homesharers are occasionally offered temporary accommodation and temporary work in the Homeshare office.
5. The majority of sharers were from overseas, with only 10% British. The majority have professional qualifications and jobs.
6. Homeshare matches have been found to be slow to develop, with other programs having started with a minimal number of matches. The number of matches and interested persons generally increases over time.
7. It is important that the Homeshare agency's policies and procedures are clearly defined, documented and adhered to, including guidelines for Homeshare arrangements that involve money changing hands.
8. Program participants left the scheme for a range of reasons. Yet, they rarely left due to dissatisfaction with the service. On the contrary many Householders were involved in as many as three matches.

- Thornton (1995) recommends follow up with past Householders for an appraisal of the service (eg. their experience, were needs met?, how could the program have been improved?).
9. It is also recommended that staff routinely reassess the household to ensure ongoing satisfaction on the part of the Homesharer and suitability of the premises.
  10. Short term arrangements are often viewed as positive for both parties as it meets the needs of Homesharers in transition and offers a variety of experiences for the Householder. In addition such arrangements are often inevitably necessary due to the uncertainty of the Householder's health and ability and sudden need for the Homesharer to change their plans. Homeshare programs must build in provision for such needs.
  11. Where a Homeshare arrangement has been long term and a close relationship has developed, it is advised that Homeshare provide support to not just the Householder, but also the Homesharer as leaving can be difficult.
  12. Whilst most Householders felt that the exchange was fair, it was noted that companionship cannot be bought and that there is scope for calculating the financial advantages, if any.
  13. There were some issues regarding Homesharers not working the equivalent of 10 hours per week and a perception by Householders that the sharer's private time was free time and yet the Homesharers saw themselves as still being 'on duty'. Clearly there needs to be a definitive line between what is classified as work and what is free time and that Householders do not have unrealistic expectations. Such issues should be included in the contract.
  14. The vetting process was considered to be thorough and effective by Homesharers and Householders and professionals involved in setting up the Homeshare arrangement reported being impressed with the staff's ability to create suitable matches.
  15. Follow up contact with Householders after commencement of a Homeshare arrangement to ascertain level of satisfaction, should be carried out in person, as telephone conversations can be overheard.
  16. Despite Homesharer monthly meetings being a contractual requirement, they did not all attend. It is suggested that maybe an informal forum for Homesharers to meet regularly is also needed as a means of developing mutually supportive relationships.
  17. When a Homeshare program has a fees policy, potential participants need to be informed of the financial implications.

### **Advantages For The Homesharer And The Householder**

Many of the advantages of entering into a Homesharing arrangement have already been highlighted in previous sections, including companionship and maintained independence for the Householder, financial advantage and security for the Homesharer. Schreter (1986) in her study of the advantages and disadvantages of Homesharing, found that the most highly perceived advantage of the program was the financial savings for both parties. Dobkin (1985) also found that homesharing programs were more cost effective than the alternatives. The second highest advantage for both was companionship, followed by having someone present in case of a medical emergency. Assistance with tasks was expressed by Homeowners and security against criminals (safety in numbers) was an advantage expressed by both, although predominantly Householders. An additional advantage expressed by Homesharers was the

ability to access suitable and attractive housing whilst in transition (eg. recently left marriage, commencing study etc.).

Thornton (1995) recognises the advantage to Homesharers of having the ability to utilise transitional housing. Short term arrangements allow them to fulfil work or study commitments and then move on. Comparatively, within the rental market there are strict limitations on the duration of lease agreements (usually 6 month minimum) and financial disadvantage in breaking a lease early.

Thornton (1995:12) also highlights the value in the simplicity of Homeshare in providing consistency of one primary carer as opposed to the lack of continuity involved in the usual “package of different providers”. In other words, Homeshare enables and supports continuity of care.

Peace and Nusberg (1984:7) in their examination of shared housing recognised the benefits as being:

- 78.companionship
- 79.financial savings
- 80.social integration
- 81.sharing tasks
- 82.reducing fear
- 83.remaining in own community
- 84.inexpensive program to implement
- 85.bringing generations closer together

The two most important benefits are cited as being financial advantage and companionship, in line with the findings of Schreter (1986). Yet again Peace and Nusberg (1984) also emphasise the advantage of this program in enabling older people to remain not only within their home, but within the familiarity of their community. Remaining in familiar surroundings fosters a continued sense of security and a link with the past. Furthermore, home ownership is generally viewed as a status symbol signifying achievement and independence and if compromised, can be perceived as detrimental to one’s autonomy. Homeshare offers continued ownership along with the financial and social benefits of sharing.

### **Limitations Of Homeshare**

Schreter (1986) interestingly found that elderly people Homesharing in a group household ranked personality differences as the greatest disadvantage, as occupants are generally indoors all day and therefore forced to interact. In contrast the main disadvantage expressed by those in a Homeshare involving two parties, was household management (eg. television programs, kitchen rules etc.).

Peace and Nusberg (1984:7) in their examination of Homesharing, identified the disadvantages as being loss of privacy; Homesharers having to move from their community; physical design of the property; incompatibility and policy deterrents (eg. planning regulations).

Jaffe and Howe (1988) in their study of Homesharing programs, found that many were experiencing difficulties with recruitment. The lack of interest may be explained as the Homesharer’s reluctance to live with a stranger. Most people seem to be deterred by this prospect, only considering it if they are in great need ie. to increase their income, obtain assistance with daily tasks due to declining health,

find affordable accommodation, or if they are fearful of an accident or crime. Furthermore, Homesharing may be only being considered as an option, because all other alternatives have been exhausted. By this stage the potential Householder may be too frail to be suitable for Homesharing and may in fact require more formal care. Yet again others may be deterred by transitional matches that are short term and unpredictable.

Once again the issue of the effects of short term Homesharers can be highly subjective. For example, the UK experience suggests that approximately 42% of Householders appeared to be satisfied with the variety of experience in having a high turn over of Homesharers (Thornton, 1995).

Both Jaffe (1988, 1989) and Pritchard (1983) support the potential value of Homesharing, but have identified limiting factors to the success of programs. Some of these factors include a lack of adequate training manuals, lack of funding and staff and reluctance amongst communities to share living space. Despite the dating of these articles, the issues they raise are still relevant today. Programs would have greater chance of long term success with stable funding sources, integration into existing agencies and referral networks, and the support of the media.

Some of the other limitations expressed in conversations with Homeshare staff, included trying to overcome a cultural emphasis on privacy and family responsibility. Whilst some families have been opposed to the idea of a Homesharing arrangement, they have not been forthcoming with alternative options. In fact, Homesharing is often only considered as an alternative when the only other option that remains is institutionalisation.

One major issue regarding Homeshare is the potential risk to older people of being exploited, neglected or assaulted. This is obviously one of the key concerns of the program as is demonstrated by the stringency and thoroughness of the screening process. Exploitation of homesharers is also of concern where householders may have unrealistic expectations (or perceptions) of the amount of time devoted to the household work by the homesharer. It is therefore imperative that clear processes are developed to ensure the protection of program participants.

## **Coordination and Staffing**

Whether coordination comes via a central coordinating body or a local agency, the expertise of the Coordinator and staff and methods of management and day to day operation have a very large influence upon the overall effectiveness of the program.

Discussions with program coordinators has highlighted a need for coordination that is informed, experienced, creative and adaptable. Coordinators must have specialist knowledge of dementia related issues. They are responsible for recruiting and interviewing, assessing suitability, arranging a match and monitoring it, and where necessary mediating. The Coordinator is also responsible for providing guidance to other staff and organising training programs for Homesharers.

Other key tasks include marketing the program, developing networks with potential referrers, maintaining records and statistics and a plethora of other duties as outlined in the job descriptions of various programs. Yet one of the most vital roles of the Coordinator that is often not referred to, is the ability to gain the trust of potential program participants and thereby dispel any myths that exist about the Homeshare process.

Johnstone (1999) supports this view by citing that older people often have unrealistic expectations of the Homesharing arrangement, the length of the match, exchange of service and the matching process. Sometimes their expectations of what the Homesharer should do is also unreasonable. This is mostly due to lack of awareness. Johnstone (1999) continues that if our target clientele are unaware and unwilling, the feasibility of successfully operating Homesharing schemes is in jeopardy.

It appears that from the experiences of successful programs, the interpersonal skills of the program Coordinator is crucial to the development of a Homeshare program. Coordinators who have a natural ability to engage people, gain their trust and understand their needs are better able to develop the expertise necessary for successful program coordination.

The issues outlined above illustrate the great need for dynamic, intuitive and personable coordination that encompasses identification of target groups, areas and organisations, and utilises a range of mediums for effective marketing that delivers consistent and comprehensive information to these groups and the general community.

## **Future Directions**

Investigation of Homeshare schemes and literature (albeit limited) has revealed a possible niche for the future development of Homesharing programs, in providing specialist Homesharing services. There has been some focus on developing a variation of Homeshare that provides a suitable Homesharer to live with someone who is terminally ill, thereby providing companionship, support and assistance to enable the person to die with dignity in the familiar surroundings of their home. Such a program would require great care in its development and its choice of Homesharers.

Another area of interest is providing Homeshare for carers. Thornton (1995) discusses this concept in view of the number of carers (especially spouses, relatives) who could benefit from a Homesharer to relieve them from and support them in their caring role. Whilst this support already occurs in some instances, a more formalised process for the future would not only provide a cost effective, alternative option for respite, but also alleviate carer stress and the strain placed upon existing under resourced, high demand carer support services.

Thornton (1995) suggests that part of the future success of Homeshare lies in its ability to sell itself to care managers, whereby Homeshare is integrated with other relevant services into a holistic care package that promotes continuity of care for Householders. Thornton (1999:28) supports this view and adds that government policy has, and will continue to cut costs in the areas of housing and health care "to provide as many options along the continuum of care at home". Whilst Thornton has written her appraisal of Homesharing from the perspective of the Canadian experience, the focus of government policy that she refers to and that British literature refers to, is equally as relevant within the Australian context.

In the current political climate, Homeshare in Australia has the *potential* to be the most cost effective housing option for Homesharers, the most cost effective and empowering alternative to residential care for Householders, as well as the most cost effective government strategy for meeting the housing and care needs of older people.

# Homeshare Victoria: Towards a Successful Model

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The development of a practical and sustainable Homeshare model is the major task that now faces Homeshare Victoria. It is not within the scope of this document to recommend such a model, but rather to identify the key areas which must be addressed in its development. The following issues have been identified as being worthy of investigation in the development of a Homeshare program.

## **Publicity**

It is vitally important to recruit program participants, and to alert the community to the benefits of Homeshare. A range of publicity and community awareness activities will need to be developed, including:

- 86. pamphlets
- 87. media releases
- 88. media advertisements (print and electronic)
- 89. public speaking engagements at relevant clubs and organisations

## **Possible Referral Sources**

Avenues for discovering potential Homeshare participants include review of demographic data targeting areas with older people or areas nearby potential Homesharers (eg. educational facilities etc.). By knowing where potential referrals can come from, program developers can more effectively target and engage the support of participants and service providers.

## **Householder**

Existing programs have found that Householders are generally referred via the following:

- 90. specific aged services and recreational activities
- 91. other human service organisations
- 92. health professionals (mental health, G.P.'s, specialists, hospitals, nurses)
- 93. self referral (word of mouth, read a pamphlet in doctors surgery, media advertising)
- 94. referral from relative / friend
- 95. voluntary organisations

## **Homesharer**

Homesharers are generally referred by:

- 96. universities and other educational facilities

97.housing services

98.community organisations

99.self referral (via word of mouth, displays in public areas, travel magazines, libraries, advertisements).

## **Legal Issues**

The development of a Homeshare program will require investigation and resolution of a number of legal issues. The concept of sharing one's home with another can raise many legal issues regarding legal liability for accidents, negligence regarding house maintenance issues, privacy and financial security. In practice, the avoidance of liability is more often based upon the good will of both parties (the Homesharer and Householder) to ensure the arrangement works, than any legal documentation.

It is however, crucial that contracts and clear understandings are developed between Householders and Homesharers regarding:

100.ownership of property

101.shared use of property

102.responsibility for maintenance of house and grounds

Furthermore, each Homeshare participant should have a range of relevant insurances including:

103.home and contents (Householder)

104.contents (Homesharer)

105.public liability (Householder)

The auspice organisation should also ensure that managers and employees are covered by Directors and Officers Liability insurance, Professional Indemnity Insurance and Volunteer insurance.

The issue of Workcover must also be explored for the Homesharer. If the Homesharer is deemed by Workcover to be an employee, then Workcover premiums must be paid, either by the program or Householder. Alternatively, if the arrangement is considered to be domestic in nature only, the scope of the work performed must be clearly defined and not exceed the Homesharer's expertise (eg no electrical, plumbing or roofing work to be attempted)

The employment status of the Homesharer may have subsequent repercussions for taxation matters and this will need to be checked with the Australian Taxation Office.

## **Quality Standards and Program Evaluation**

To ensure continual improvement of services in line with participants' needs, and effectiveness and appropriateness of policies and procedures, the program should be evaluated. To facilitate this, the performance indicators should be determined at the beginning of the process. Therefore program development phases must be thoroughly documented and the forms and processes must enable the performance indicators to be identified and measured.

## Recording Statistical Data

Thornton (1995) recommends comprehensive recording of data in Homeshare programs. Staff and volunteers should record the following:

1. Numbers of applications from potential Householders and Homesharers
2. Numbers of each rejected
3. Numbers of both never matched
4. Length of wait for matches
5. Total numbers of arrangements
6. Duration of arrangements
7. Reasons for termination
8. Number of trial arrangements terminated
9. Homesharer:
  - 106.occupation
  - 107.previous caring experience
  - 108.care tasks offered
10. Householders:
  - 109.source of information about Homeshare
  - 110.person referring
  - 111.support needed
  - 112.significant people
  - 113.existing support
  - 114.contribution to program costs.

## The Homeshare Coordinator

The issues raised in this document has indicated that the Homeshare Coordinator holds a very important, pivotal position within the program. The following skills, knowledge and values are considered to be vital:

- 115.A sound understanding of the legal implications of the program. In particular, the Coordinator must be able to discuss these matters with potential Householders, their families, and Homesharers in a clear manner, and understand the importance of thorough documentation.
- 116.An ability to promote and market the concept of Homeshare. Experience in developing media releases and brochures, and in public speaking are vital skills that are needed to recruit both Householders and Homesharers.
- 117.High level communication skills, to be able to relate easily to people of all ages and various cultural backgrounds.
- 118.Excellent assessment skills, to be able to ask the right questions and make sound judgements about people and their particular situation, and to be able to document these decisions with clarity and professional wisdom.
- 119.To be innovative and excited by the concept of a dynamic program that must meet the needs of



multiple stakeholders.

## **Summary**

Clearly, the range of choices for model development are quite extensive and, with the added value of support from other Homeshare programs, Victoria is in good stead for developing and implementing an innovative and dynamic program. Such a program can not only be designed to meet the housing needs of younger people in a cost-effective manner, but also the desire of older people to retain their independence, by the provision of at home, live in support and assistance. The success of such a program is going to be dependent upon many factors as previously illustrated, with one of the most challenging and yet crucial aspects being engaging the support and financial backing of funding bodies.

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Nan Maitland (Founder Homeshare UK)

Cynthia Rodgers (Two's Company)

Lori Dobos (Northwest Counselling Services)

Marjorie Marlin (Cooperative Housing Corporation)

Mary Eleanor Wall (Senior Home Sharing)

Rita Zadoff (Housemate Match)

Karen Stewart (American Association of Retired Persons [AARP])