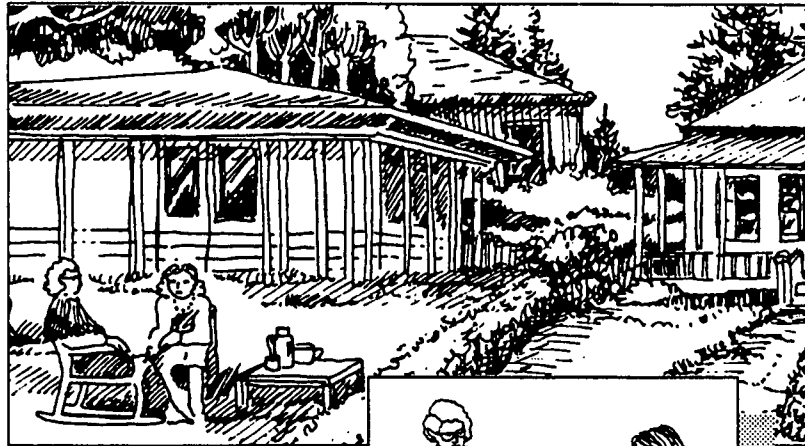


A SURVEY OF CANADIAN HOMESHARING AGENCIES SERVING THE ELDERLY



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ABSTRACT

Homesharing is a living arrangement in which two or more unrelated persons occupy a single dwelling, each having some private space but sharing common areas such as kitchen, bathroom and living room. This report describes findings from a study which examined the objectives, services, operational characteristics and clientele of 18 Canadian agencies which help older persons to make suitable homesharing arrangements.

The study consisted of telephone interviews and site visits to each agency. Print materials were also examined.

While all 18 agencies were found to provide both referral and counselling services, two organizational forms were in evidence: the intermediate form (8 agencies) and the advanced form (8 agencies). An intermediate agency provides a separate service but organizationally is part of a larger program or department. An advanced agency, although it may have links with other service groups, exists as a separate entity.

The strengths and weaknesses of these agencies, their place (and the place of homesharing) in the shelter-care continuum and key issues in the establishment and operation of homesharing agencies are discussed. Whenever possible, characteristics of the 18 agencies are compared with those of six agencies no longer in operation.

The report concludes with a series of recommendations that may assist existing agencies to function more efficiently and facilitate the development of new agencies which are viable over an extended period of time.

1. INTRODUCTION

1.1 Background and Objectives of the Study

Homesharing is one of a number of community-based living arrangements that have emerged in recent years to meet the needs of the elderly for housing, income, companionship or assistance with activities of daily living.

In homesharing, two or more unrelated people occupy a house or apartment. Each has his or her own private space while sharing some common areas such as kitchen, bathroom and living room.

While homesharing can involve a pooling of incomes and joint ownership or rental of the dwelling unit, generally when entered into by seniors, this arrangement involves payment of "rent" or provision of services in full or partial exchange for rent by a home seeker to a home provider.

As Jaffe and Howe (1988) point out, the principle of shared housing is not new; people have always done it. What is new is that formal programs have been established to facilitate the homesharing process.

Cram (1983) describes these in the context of a three-part typology of homesharing which includes:

- i) a naturally occurring or free market model;
- ii) an agency-assisted model; and
- iii) an agency-sponsored model.

The Naturally Occurring or Free-Market Model describes a spontaneous action by persons who seek out, either through social networks or by formal advertising, individuals who will make suitable housemates.

...these models tend to accommodate 2-5 people in single family detached dwellings or townhouses which are found in familiar, age integrated residential neighbourhoods. The housing units are quiet, unobtrusive and rarely recognized by people outside the immediate neighbourhood. (Cram, 1983, p.2).

The Agency-Assisted Model is designed to offer specific match-making services between the home provider and the home seeker. They can be sponsored and/or operated by private non-profit groups, private entrepreneurs or public agencies. Agency assisted models are of the following two types (Dobkin, 1983):

Referral Only - These agencies focus on basic matching activities including intake and screening, reference checks, interviewing of potential homesharers and referring them to each other. Once the referral is made there is no mechanism within the agency for follow-up contact. An example of this is a housing registry.

Referral and Counselling - This model offers a broader range of services including, in addition to the services offered by a referral only agency, housing option counselling, provision of community services information, community services referral, in-depth home interviews, home

inspection, assistance in negotiating agreements, procedures whereby prospective housemates can be acquainted prior to matchmaking, as well as some follow-up services.

The Agency-Sponsored Model describes the most comprehensive of the homesharing services. Here the agency rents, or more commonly owns, and retains primary responsibility for, a house in which anywhere from two to twenty people live (Blackie, 1985). In these residences the agency will usually provide some housekeeping and/or meals, and will also be responsible for selecting residents, whose occupancy agreement is with the agency. Day-to-day decision-making and management of the home are, however, the responsibility of the occupants. This family-style involvement distinguishes agency-sponsored shared homes from boarding homes or care homes. Shared homes are operated on a non-profit basis, usually by church, community or social service agencies, although societies are sometimes incorporated for the purpose (Blackie, 1985). Abbeyfield Houses (Streib et al, 1984) and Florida's Share-A-Home Program (Harkey and Traxler, 1982; Traxler, 1983) are examples of agency-sponsored shared housing.

In 1984, it was estimated that there were at least 137 examples of agency-sponsored shared housing in the United States as well as 112 non-profit and over 300 commercial match-up agencies (Schreter, 1985).

In Canada, the primary example of agency-sponsored shared housing is the Abbeyfield House, two of which are currently in operation, in Sidney and in Kelowna, B.C. (Shimizu, 1985; Murray, 1988). Three more are in the planning stages -- in Victoria, Guelph and Toronto (Abbeyfield Houses Society of Canada, 1989).

It is the agency-assisted model, however, that is the focus of this report. To date the bulk of information concerning Canadian examples of this model derives from case studies of individual agencies (Baldwin, 1986; Payne and Bona, 1984; Peebles, 1986; Rapelje, 1985) and descriptions of Provincial government funding initiatives (cf. Corke, 1986; Spence, 1986). While these case studies and descriptions have been useful, the lack of larger-scale data means that there has not been a comprehensive picture of the manner in which homesharing agencies function in Canada. The current study was designed to fill this gap. It is based on a cross-Canada survey conducted in 1987-88 by researchers from the Gerontology Research Centre at Simon Fraser University and MacLaren Plansearch.

Specific objectives of the study were:

- a) To describe the range of client services and operational characteristics of homesharing agencies assisting the elderly in Canada.
- b) To ascertain the role of these agencies within the shelter-care continuum.

c) To test the following four hypotheses:

1. that within the agency-assisted model there exists a diverse range of objectives, organizational structures and services offered;
2. that in matches involving older persons intergenerational matches (one person over and one under age 55) predominate;
3. that a homesharing agency requires a considerable degree of "lead time" to establish itself in the community as a creditable and legitimate service; and
4. that the degree of "formality" of an agency influences the clients it attracts and/or the services it offers.

1.2 Method

The study commenced in September, 1987, and was conducted in four phases.

Phase I consisted of an exhaustive review of the American and Canadian literature on homesharing by elderly persons, with emphasis on agencies assisting them to do so (Doyle, 1989).

Phase II consisted of a search for agencies in Canada assisting in the homesharing process.

Phase III consisted of telephone interviews with staff of Canadian homesharing agencies serving elderly persons.

Phase IV consisted of site visits to all agencies contacted by telephone in Phase III (March, 1988) and still in operation when Phase IV was conducted (June, 1988).

In total, 27 agencies were identified, 25 of which were found to serve elderly clients. By Phase IV only 19 of the 25 were still in operation.

A list of all 25 agencies, classified by their operational status in Phase IV, by province, and by year of establishment can be found in Appendix I.

1.3 Content of this Report

This report presents data from telephone interviews and site visits conducted with 18 of the 19 agencies still in operation by Phase IV (one of the homesharing agencies in Ontario chose not to participate in the study) and from telephone interviews with six agencies that had ceased operation.

It begins with an overview of Canadian homesharing agencies serving the elderly, describing their geographic distribution, period of establishment, organizational characteristics and objectives. Their physical setting, the services they offer, their operational characteristics, management and staffing are then described. Attention then turns to their clients, the number of matches they have made and to their Coordinators' perceptions of the impact of and obstacles to homesharing. The report concludes with some

recommendations hopefully useful both to agencies currently in operation and to groups considering establishing a homesharing agency.

Throughout the report wherever possible, comparisons are made between the 18 existing agencies and the six agencies no longer in operation, three of which, it should be noted, ceased operation between Phases III and IV of the study.

Since it was felt that the period in which the agency was established might have an important bearing on the nature of its operations, data for the existing agencies are presented separately for the three periods 1980-83, 1984-85 and 1986-88. While not presented in disaggregated form, the data from the six agencies that have ceased operation were also examined for trends relating to their year of establishment.

It should be noted that throughout the study the emphasis was on the agencies themselves. Agency Coordinators, other staff and agency records served as the data source. No attempt was made to contact clients nor to study individual matches.

2. AN OVERVIEW OF HOMESHARING AGENCIES SERVING THE ELDERLY IN CANADA

2.1 Their Geographic Distribution

As shown in Table 1, homesharing agencies serving the elderly have been established in six provinces. Currently, agencies exist in five provinces (B.C., Alberta, Ontario, Quebec and Nova Scotia), with the majority (12/19) being located in Ontario.

TABLE 1

CANADIAN HOMESHARING AGENCIES SERVING
THE ELDERLY BY PROVINCE AND OPERATING STATUS

| | IN OPERATION | CEASED OPERATION | TOTAL |
|-------------|--------------|------------------|-------|
| B.C. | 1 | 1 | 2 |
| Alberta | 1 | 0 | 1 |
| Manitoba | 0 | 1 | 1 |
| Ontario | 12 | 1 | 13 |
| Quebec | 4 | 3 | 7 |
| Nova Scotia | 1 | 0 | 1 |
| TOTAL | 19 | 6 | 25 |

2.2 Year Established

Of the 19 homesharing agencies currently in operation, five were established between 1980 and 1983, three between 1984 and 1985 and ten between 1986 and 1988. Of the latter ten, two had been in operation less than three months at the time the study was conducted.

Only one of the 18 existing agencies participating in the study has not operated continuously since start-up. This agency attributed the interruption to its transition from an informal student summer project to a formally funded homesharing agency.

Of the six agencies that had ceased operation, two were established between 1980-83 and were in operation for 3-4 years, one was established between 1984-85 and was in operation approximately 18 months and three were established between 1986-88 and were in operation from 7 to 18 months.

2.3 Organizational Characteristics

The following section describes the form, sponsorship, funding source and staffing of the 18 existing and six non-functioning homesharing agencies participating in the study.

Although the form, sponsorship, funding and staffing of the homesharing agencies are conceptually distinct, in practice these attributes are related and should be considered together.

a) Form

McConnell and Usher (1980) categorize matchup agencies as simple, intermediate or advanced in form according to their degree of organizational independence. A simple agency consists of one or more workers within an existing department or program who have been freed part-time or full-time to engage in matchup activities. An intermediate agency is a sub-agency, providing a separate service but organizationally part of a larger program or department. An advanced agency, although it may have links with other service groups, exists as a separate entity. Although this terminology suggests a progression from simple to advanced, some agencies begin and remain in one organizational form.

Of the existing agencies studied, two could be categorized as simple, eight as intermediate and eight as advanced. As shown in Table 2, both of the simple agencies had been established between 1980 and 1983; amongst the ten newest agencies, six were intermediate and four advanced.

Only three agencies had changed form since establishment. All were advanced agencies which had evolved from intermediate ones. All three were initiated in 1987 or 1988 and were in Quebec.

TABLE 2
ORGANIZATIONAL FORM BY YEAR OF ESTABLISHMENT

| | Year Established | | | Total (n=18) |
|--------------|------------------|------------------|-------------------|-----------------|
| | 1980-83 (n=5) | 1984-85 (n=3) | 1986-88 (n=10) | |
| Simple | 2 | 0 | 0 | 2 |
| Intermediate | 1 | 1 | 6 | 8 |
| Advanced | 2 | 2 | 4 | 8 |

Of the six agencies no longer in operation, three were simple, two were intermediate and one was advanced.

b) Sponsorship

The agency form is closely related to both sponsorship and funding. Simple agencies normally draw both staff and support resources (such as office space and equipment) from the organization of which they are a part. Intermediate ones may have separate budgets and even separate funding sources, but often benefit directly and indirectly from the resources of their parent (i.e. sponsoring) agency. Advanced agencies, while often initiated or sponsored by a local community group, do not necessarily derive any direct or indirect financial assistance from this association.

As noted in the Introduction, sponsorship of matchup agencies can be categorized as public or private. Two of the existing agencies are publicly sponsored, both by regional municipalities. One, an intermediate agency, operates within the housing section of a planning department. In the case of the other, a simple agency, the Regional government provides staff time for homesharing in addition to other services provided for seniors in the area.

As shown in Table 3, 14 agencies are privately sponsored, all by non-profit groups. Among the sponsors of these non-profit programs two types predominated: those which provide a range of services for seniors and those which offer a more general menu of community services. Included in the former category are four agencies sponsored by groups oriented to meeting seniors' needs. In the latter category are six agencies sponsored by local community groups or family/community service agencies, two sponsored by churches and one initiated by the V.O.N. in response to a perceived need of seniors and located in a seniors' centre. The remaining agency under non-profit sponsorship developed from a housing registry.

Two other agencies described themselves as autonomous, indicating that they currently had no outside affiliation. One, however, had originated in a seniors' service organization and the other in a community health department.

TABLE 3
SPONSORS OF HOMESHARING AGENCIES

| | <u>Seniors'</u> <u>Service</u> | <u>Community</u> <u>Service</u> | <u>Other</u> <u>(Housing,</u> <u>Health)</u> | <u>Total</u> |
|-------------------------------------|-----------------------------------|------------------------------------|--|--------------|
| Public sponsor | 1 | 0 | 1 | 2 |
| Private non-profit sponsor | 4 | 9 | 1 | 14 |
| Autonomous (original sponsor) | 1 | 0 | 1 | 2 |
| Total | <u>6</u> | <u>9</u> | <u>3</u> | <u>18</u> |

Of the six agencies no longer in operation, three (two intermediate and one simple) had operated within local public agencies, in two cases social service departments and in one case a hospital. The remaining three were privately sponsored, two by community groups and one by a seniors' centre.

c) Funding

All of the existing agencies depend on public funding either directly or indirectly (i.e. through a non-profit society). None are run on a commercial basis.

Twelve agencies have on-going funding, that is although funding is subject to meeting performance standards, it does not have to be reapplied for annually. Eleven of these (two public and nine private) are in Ontario, which has a Provincial program which expressly provides funds for homesharing agencies. The twelfth, in Nova Scotia, is municipally supported.

The other six agencies operate on a rather more precarious basis. One agency, in Alberta, is funded on a year-to-year basis by the provincial government. One agency in Quebec survives because the salary of its worker is maintained by its parent organization. Three agencies in Quebec, when possible, use employment-creation grants to maintain staff. One of these was operating on a solely volunteer basis when it was visited. At the time of the study, the program in Vancouver had run for almost six years on a variety of short-term federal and provincial grants.

Of the six agencies that had closed by the time the study was conducted, five had operated on salaries provided by their parent agencies. The sixth was funded by a New Horizons grant.

Of the four agencies which gave a reason for closing, two attributed their inability to continue to a lack of resources. The other two spoke of poor response to advertising (i.e. an apparent lack of need).

d) Staffing*

There was considerable variation in the number of staff employed by the 18 agencies participating in the study. Of the 12 agencies with ongoing funding, nine have between one and two full-time equivalent workers and three have two or more. Of the six agencies with less stable funding, only Edmonton and Vancouver have more than part-time staffing. The three Quebec matching agencies dependent on federal employment-creation grants all lack ongoing staff resources. The fourth Quebec agency has an ongoing half-time worker.

Five of the six agencies no longer in operation and the sixth, for part of the time, had less than one full-time staff person.

Seven of the existing agencies make regular use of volunteers. Five of these are well established agencies in which volunteers supplement the work of paid personnel by undertaking clearly defined tasks such as home inspections, interviews or clerical activities. In two, volunteers perform essentially the same tasks as the part-time paid staff. In one agency, the entire program was functioning on a volunteer basis when the site visit was made.

In summary, two contrasting pictures emerge from the composite data on Canada's homesharing agencies serving the elderly. The bulk of agencies (more than two-thirds) are small intermediate or advanced groups (i.e. sub-agencies or fully independent) with one to three full-time equivalent staff and relatively stable funding. Mostly sponsored by private non-profit societies, they have strong links to their communities through their sponsoring group.

The remainder have little in the way of resources, because they lack stable funding and/or because they are operated within another setting by personnel only assigned to them part of their time. This latter description, it should be noted, applies to all of the agencies that have closed.

2.4 Objectives

a) Current Objectives

In both the telephone interviews and the site visits the agency spokespersons were asked to state the current objectives of their homesharing service. These responses, along with their written statement of objectives (submitted by all but four of the newer agencies), were analyzed to ascertain the primary emphasis of the organization's activities.

The objectives of the homesharing agencies appear to fall into three main categories:

1. those which address a housing need, usually an affordability problem, but sometimes a need for more efficient use of housing stock or the desire to widen the housing options available;

* See also section 6.2

2. those which are geared towards relieving problems of isolation. This objective includes consideration of both the need for companionship and the security of having another person in the home.
3. those focused on enabling elderly people to remain independent in their own homes. Although in practice this objective overlaps with objective 2, it is usually expressed separately.

Meeting housing needs was the primary objective of ten agencies. For eight of the ten, increasing housing affordability was the primary goal; two others focused their efforts on broadening the housing options available for seniors. Three agencies saw provision of companionship and security as their first objective. One agency (in Toronto) gave equal weighting to housing and companionship as objectives. Four agencies considered that assisting older people to remain independent was their most important task.

Table 4 shows the agencies' primary objective by year of establishment and by location. Clearly, the oldest agencies and those outside Ontario are responding more to issues of companionship and independence for seniors. The Ontario agencies, are more housing oriented, a not unexpected finding given the shortage and high cost of housing in Ontario and their reliance for funding on the Provincial Ministry of Housing. In fact, four of the newest agencies established in Ontario presented housing affordability as their sole objective. Virtually all other agencies expressed all three objectives as goals towards which they were working, with the one entered in Table 4 being essentially the "first among equals".

TABLE 4
PRIMARY OBJECTIVE OF HOMESHARING AGENCIES BY YEAR ESTABLISHED

| Objective | Year Established | | | Total (n=18) |
|----------------------------|---|---|---|-----------------|
| | 1980-83 (n=5) | 1984-85 (n=3) | 1986-88 (n=10) | |
| Housing | Niagara Toronto* | Scarborough Ottawa East York/ Flemingdon | Etobicoke Kitchener London North Bay Sault Ste Marie Edmonton | 10.5* |
| Companionship/ Security | Toronto* Vancouver Project Co- existence (Montreal) | | Peterborough | 3.5* |
| Independence | Dartmouth | | Jonquiere Gatineau Centre d' Assistance (Montreal) | 4 |

* Housing and Companionship seen as equal by Toronto

Among the six agencies no longer in operation, three stated that their main objective was to address the problem of housing shortage, two stated they were formed to reduce the isolation of the elderly while the main objective of one was to enable seniors to remain at home. By date of founding they conform to the pattern evident in the existing agencies in that the two oldest agencies were focused on issues of isolation of the elderly and three of the four newest ones were focused on housing objectives.

It should be noted that in the literature, in addition to meeting housing and companionship needs and enabling older persons to remain in their homes a fourth objective is often mentioned. This fourth objective is the provision of caregiver services, either paid or in return for reduced rent. None of the Canadian agencies studied mentioned this as their primary objective, and in fact only one mentioned it at all. Only seven agencies ruled it out completely, however, by stating that they restricted their services to those who are self-sufficient in activities of daily life. In general it appeared that agencies would make such a match for appropriate clients, but that such matches were marginal to their operation.

The predominance of non-service objectives among the agencies studied indicates that they fall in Jaffe and Howe's (1988) category of "housing-oriented", rather than "service-oriented" homesharing programs. In the Canadian setting, in other words, the place of homesharing in the shelter-care continuum is firmly at the shelter end of the continuum.

b) Changed Objectives

Six of the existing agencies reported having changed one of its major objectives since commencing operation: two of these were established in 1980-83, one in 1984-85 and three in 1986-88.

One of the two agencies established in 1983 that had changed objectives had been founded to provide affordable housing. This agency's objective now is to help seniors to stay in their own homes. The second agency used to match two seniors, both of whom were renters. Now it makes matches as long as one person is 55 years of age or older and matches homeowners as well as renters. This agency changed its objectives because it could not make any matches using the original criteria.

The agency formed in 1984-85 that changed objectives had originally been established to house teenagers. It now serves adults. This agency changed its focus for two reasons: first, because it realized there were many other programs for teenagers in the local community and secondly, as a means of taking advantage of Provincial funding available to agencies facilitating homesharing among the elderly.

Two of the three newer agencies that changed objectives also did so as a means of securing government funding. One was originally formed to serve single parents. It now requires that at least one member of the match be a single parent or a senior. The second agency commenced operations as a housing registry. It has now added a homesharing match-up service for seniors. In contrast to these two agencies, the third of the three newer agencies to change objectives went in the opposite direction. Originally formed to support the elderly in their own homes, this agency's objective has now changed to focus on issues of isolation and housing affordability regardless of the age of the client.

Among the six agencies no longer in operation, five had a written statement of objectives. Only one reported a change of objectives while in operation -- from "homesharing to reduce isolation" to "group meetings of isolated homeowners".

It is interesting to note that only nine of the 18 existing agencies had had a formal and two an informal needs assessment conducted prior to their establishment. These eleven included two of the five agencies established between 1980-83, all three of the agencies established between 1984-85, and six of the ten newer agencies.

In two cases, the needs assessment was done by a student, one as a graduate thesis and the other as a summer project funded by a student employment grant (Challenge '85). In two cases, the needs assessment was done by the individual who subsequently became Coordinator of the homesharing agency. The remainder were done by the city, community groups or the sponsoring agency.

3. PHYSICAL SETTING

3.1 Location Within the Community

As shown in Table 5, eight of the existing agencies are in a downtown location, eight are in mixed residential-commercial-industrial areas, one is in an industrial/commercial area, while one, at the time of the site visit, was described as "in the middle of nowhere". This agency, it should be noted, was scheduled to move the next month to a downtown location.

No major differences were apparent when the agencies were compared in terms of period of establishment.

TABLE 5

GEOGRAPHIC LOCATION OF EXISTING AGENCIES

| | Year Established | | | Total (n=18) |
|-----------------------|------------------|------------------|-------------------|-----------------|
| | 1980-83 (n=5) | 1984-85 (n=3) | 1986-88 (n=10) | |
| Downtown centre | 2 | 1 | 5 | 8 |
| Residential/mixed | 2 | 2 | 4 | 8 |
| Industrial/commercial | 0 | 0 | 1 | 1 |
| Outlying area | 1 | 0 | 0 | 1 |

3.2 Type of Building

The existing agencies vary considerably in terms of the type of building in which they are located. As shown in Table 6, seven are located in office buildings; five in large buildings and two in small buildings. In the case of the large buildings, two house regional municipal offices and three are the "home" of various community services. Of the remaining agencies, three are in seniors' centres (two of which are adjacent to seniors' housing), two are in functioning schools (one an adult high school and the other a grade school), two are in small commercial buildings, one is on the lower floor of a shopping mall, one shares a house with its "parent" agency and one shares a store front location with a community information service. The agency in the store front also has a satellite office in an adjacent community. The satellite office is open three mornings a week and has a remote answering machine. It is located on the second floor of a building which houses various seniors' programs and a nursery school.

When the data are examined in terms of the period in which the agency was established, it is apparent that a greater proportion of the older than the newer agencies are in office buildings.

TABLE 6

| TYPE OF BUILDING | Year Established | | | Total (n=18) |
|---------------------------|------------------|------------------|-------------------|-----------------|
| | 1980-83 (n=5) | 1984-85 (n=3) | 1986-88 (n=10) | |
| Office building | 4 | 1 | 2 | 7 |
| Seniors' centre | 1 | 0 | 2 | 3 |
| School | 0 | 1 | 1 | 2 |
| Small commercial building | 0 | 0 | 2 | 2 |
| Shopping mall | 0 | 1 | 0 | 1 |
| Store front | 0 | 0 | 1 | 1 |
| House | 0 | 0 | 1 | 1 |
| Church | 0 | 0 | 1 | 1 |

Locating other than in a standard office building appears to have some drawbacks. For example, one of the agencies located in a seniors' centre pointed out that "the problem with being in a seniors' centre is that most seniors are providers who are interviewed at home and most seekers, who must come to our office to be interviewed, are younger and don't identify with a seniors' centre". The agency located in a church noted that "some clients are intimidated by a church affiliation. We have to let clients know it's a community and not strictly a church program". The agency in the shopping mall noted that its basement location was neither physically accessible nor obvious. As a result, it was attempting to move upstairs.

A location in a standard office building, on the other hand, was perceived to be advantageous because it "looks professional and businesslike". Also advantageous, according to several agencies, was to be in proximity to other agencies. "All the other agencies in the building act as a referral service. The wide variety of services attracts many of the clients."

3.3 Office Space

Four of the agencies occupy two offices and have access to a reception area or lounge which is shared with another agency or group.

Eight agencies occupy one office; one of these also has access to a waiting room and private interview space; another has access to a lounge for social events and interviews.

In most cases the study site visitor described these spaces as "professional", "business-like", "comfortable", "clean" and "well-maintained".

The office space occupied by the remaining six agencies is more problematic.

One agency, which shares an office with the staff of the seniors' centre in which it is located was described by the study site visitor as "a welcoming place for seniors". At the same time, she noted that the office was noisy and that there was considerable traffic through it and the adjacent communal area.

A second agency located in a seniors' centre had its desk in a screened-off portion of a games room. The area tends generally to be noisy. Because storage cupboards and filing cabinets in the area are used by others, people frequently walk in. As a result, the "office" often cannot be used for interviews. Further, phone calls, meetings, etc. have to be scheduled around other programs using the games room.

Noise is also a problem for an agency which has two desks in a screened-off area of a busy municipal office and for an agency which shares space with a multi-cultural youth association from which it is separated by dividers.

Lack of privacy is a problem for an agency which has its desk in an open area shared with a local social development committee. This agency, understandably given its office space, does most of its interviews in providers' homes or community information centres.

Crowding is a problem for an agency which occupies a small area separated by dividers from the community information service with which it shares space. Occasionally, however, it does have access to meeting rooms and private interview space which does alleviate the problem to some extent.

It should be noted that while two of the six agencies having problems with noise, lack of privacy and/or lack of space were established in 1980-83, the other four were of recent origin (i.e. established in 1986-88).

3.4 Accessibility

While all but one agency is located within a few blocks of public transportation, three were described by the study observer as being in remote as opposed to central locations. Two of these compensated for their location by having staff travel to the seekers and providers. Of the three, two were established in 1986-88; the third, which is about to relocate, was established in 1980-83.

Fourteen of the 18 agencies are wheelchair accessible, 12 directly, one via a ramp in the basement and one by elevator by arrangement.

Of the four agencies that are not wheelchair accessible, two were established between 1984-85 and two between 1986-88.

3.5 Location Change

Eight agencies occupy space different from that in which they originally began operating. In two cases, the move was to larger space within the same building. In the remaining six cases, there was a change of geographic location. Three moved to gain more space; three moved because their parent agency moved.

Of the eight agencies that had moved, three were established between 1980-83; one between 1984-85 and four between 1986-88.

3.6 Visibility

Only four of the agencies are clearly identifiable both from in and outside the building. All four of these are recently established agencies.

In general, the study site visitors felt the agencies do not advertise themselves sufficiently in their own location and improved signage both in and outside the building is strongly recommended.

4. SERVICES OFFERED

4.1 Match Making Activities

When asked which of the nine activities shown in Table 7 they engaged in, in the process of making a match, all 18 existing agencies reported that they interview each client and refer potential homesharers to each other. From 14-17 agencies also prepare potential homesharers for their interview with each other, conduct in-depth home interviews and check provider's and seeker's personal references. While 14 inspect the provider's home, only four inspect the seeker's home. (See Appendix II for criteria existing agencies use in inspecting homes).

The major difference between agencies established early in the 1980's and those established later was in the proportion who attended the sharers' interview and who checked medical references. Medical reference checking was a more common practice among agencies established in the early 1980's; attending sharers' interviews was more frequent among newer agencies.

TABLE 7
ACTIVITIES ENGAGED IN MAKING A MATCH

| Activity | Year Established | | | Total (n=18) |
|--|------------------|------------------|-------------------|-----------------|
| | 1980-83 (n=5) | 1984-85 (n=3) | 1986-88 (n=10) | |
| Interview clients | 5 | 3 | 10 | 18 |
| Refer potential home-sharers to each other | 5 | 3 | 10 | 18 |
| Prepare potential home-sharers for interview with each other | 5 | 3 | 9 | 17 |
| Conduct in-depth interviews | 5 | 3 | 8 | 16 |
| Check personal references | 4 | 3 | 9 | 16 |
| Inspect provider's home | 4 | 2 | 8 | 14 |
| Attend sharers' interview | 2 | 1 | 7 | 10 |
| Check medical references | 3 | 1 | 3 | 7 |
| Inspect seeker's home | 2 | 0 | 2 | 4 |

The proportion engaging in the activities listed in Table 7 was considerably smaller in the agencies no longer in operation. For example, 66% of closed agencies compared with 77% of existing agencies interviewed clients, prepared potential homesharers for interviews with one another and/or checked personal references; only one-third of closed agencies compared with 55-88% of existing agencies conducted in-depth interviews with clients and/or attended sharers' interviews; 16% compared, respectively, with 39% and 22% of existing agencies checked medical references or inspected seekers' homes.

4.2 Other Services Offered

In order to ascertain whether agencies fit Dobkin's (1983) "referral only" or her "referral/counselling" model, they were asked a series of questions designed to identify services provided over and above those that could be considered basic match-making services.

When asked if they provided counselling, 16 of the 18 existing agencies stated that they did. The two that did not were both small and very new agencies; one, in fact, had not yet begun to make matches. The major types of counselling provided concern community services and education (15 agencies),

interpersonal skills needed for homesharing (14 agencies) and housing options (9 agencies).

As shown in Table 8, a variety of other services were provided as well. For example, 16 of the 18 agencies routinely refer clients to other services available in the community, including other housing agencies, income assistance programs, legal and medical services.

Fifteen offer assistance in drawing up a home provider/home seeker agreement.

Various types of information are also provided by from two to eleven of the agencies including, as shown in Table 8, information about home seeker/provider liability waivers and concerning income tax requirement.

Additionally, four agencies provide social activities to facilitate the matching process, usually taking the form of afternoon teas to give clients an opportunity to meet informally and learn about homesharing.

Three agencies provide transportation for clients to attend interviews or meet prospective homesharers.

None actually provide housing stock.

Virtually all of the Canadian agencies surveyed, in other words, fit the "referral/counselling" model rather than the "referral only" model.

Few differences were apparent when the existing agencies were compared in terms of their period of establishment.

Among the agencies that had ceased operations, the proportion offering counselling and referring clients to other services (83%) was highly similar to that for existing agencies (89%). Noticeable differences were apparent, however, in the proportion offering assistance in drawing up homesharing agreements (only 50% of the agencies that had ceased operation compared with 83% of the existing agencies). Agencies that had ceased operation also provided considerably less information to clients than existing agencies; none had provided social activities or transportation.

TABLE 8

OTHER SERVICES OFFERED

| | Year Established | | | Total n=18) |
|--|------------------|------------------|-------------------|----------------|
| | 1980-83 (n=5) | 1984-85 (n=3) | 1986-88 (n=10) | |
| Counselling | 5 | 3 | 8 | 16 |
| * community services and education | 5 | 3 | 7 | 15 |
| * interpersonal skills for homesharing | 5 | 3 | 6 | 14 |
| * housing options | 2 | 3 | 4 | 9 |
| Referral to other services | 4 | 3 | 9 | 16 |
| * other housing agencies | 4 | 3 | 7 | 14 |
| * income assistance | 1 | 3 | 7 | 11 |
| * social workers | 2 | 3 | 6 | 11 |
| * legal | 2 | 2 | 7 | 11 |
| * medical | 1 | 2 | 4 | 7 |
| * home support agencies | 1 | 2 | 3 | 6 |
| * drug/alcohol treatment | 0 | 1 | 4 | 5 |
| * education/employment | 0 | 1 | 2 | 3 |
| * family/personal counselling | 0 | 2 | 0 | 2 |
| * credit/financial management | 0 | 0 | 2 | 2 |
| Assistance in drawing up homesharing agreement | 4 | 2 | 9 | 15 |
| Information: | | | | |
| * re: home seeker/ provider liability waiver | 3 | 2 | 6 | 11 |
| * re: income tax on rental income | 2 | 2 | 5 | 9 |
| * personal property checklist | 3 | 0 | 3 | 6 |
| * guidelines in care of health emergency/ death | 2 | 0 | 3 | 5 |
| * checklist of questions for potential home- sharers | 1 | 1 | 0 | 2 |
| Social Activities | 0 | 1 | 3 | 4 |
| Transportation | 1 | 2 | 0 | 3 |

5. OPERATING CHARACTERISTICS

5.1 Hours of Operation

Seventeen of the existing agencies operate Monday to Friday "nine to five" or regular business hours. The remaining agency operates on a part-time basis.

Five of the six agencies that had ceased operation had been open daily: two from 9 am - 5 pm, one from 10 am - 4 pm, one from 8 am - 8 pm and one from 9 am - 12 am. The sixth agency functioned on an ad hoc basis.

5.2 Records and Forms

As shown in Table 9, all existing agencies maintain a registry of applicants. Sixteen keep a record of all matches and have a standard interview form. Fifteen produce a summary record of number and duration of matches. Thirteen have records of the results of advertising and promotion. Ten have accounting records and client information forms. Six have personnel records. From one to four agencies also mentioned several other types of forms.

When the existing agencies were compared in terms of their period of establishment, it was apparent that the oldest agencies had the greatest number of procedures in place for recording/monitoring their activities on an ongoing basis.

Differences were also apparent between the existing agencies and those no longer in operation. Five of the six non-functioning agencies had maintained a registry of applicants and a record of each match. Four had a client information form. However, only half, compared with two-thirds to five-sixths of the existing agencies had an interview form, a summary record of matches, a record of referrals, a record of the results of advertising and promotion and/or a standard provider-seeker contract. Only one had client/agency waiver forms and/or accounting or personnel records.

TABLE 9

RECORDS AND FORMS

| | Year Established | | | Total (n=18) |
|---|------------------|------------------|-------------------|-----------------|
| | 1980-83 (n=5) | 1984-85 (n=3) | 1986-88 (n=10) | |
| Registry of applicants | 5 | 3 | 10 | 18 |
| Interview forms | 4 | 3 | 9 | 16 |
| Record of each match | 5 | 3 | 8 | 16 |
| Summary record of number and duration of matches | 5 | 3 | 7 | 15 |
| Record of each referral | 4 | 3 | 7 | 14 |
| Client/agency waivers | 4 | 2 | 7 | 13 |
| Results of advertising and promotion | 4 | 3 | 6 | 13 |
| Standard provider-seeker contract | 4 | 1 | 6 | 11 |
| Client information form | 3 | 3 | 4 | 10 |
| Accounting | 3 | 1 | 6 | 10 |
| Personnel records | 2 | 3 | 1 | 6 |
| Client/agency agreement | 1 | 0 | 3 | 4 |
| Post-interview evaluation form | 1 | 0 | 2 | 3 |
| Narrative form to record problems | 0 | 0 | 1 | 1 |
| Health evaluation form | 0 | 1 | 0 | 1 |
| Reference form | 0 | 0 | 1 | 1 |
| Accommodation assessment form | 1 | 0 | 0 | 1 |

5.3 Business Plan, Policy and/or Procedures Manual

Only nine of the existing agencies reported having a business plan: of these, one was from among agencies formed in 1980-83, one was from those formed in 1984-85 while six were newer agencies. The newer agencies were, however, no more likely than the older agencies to have a policy or a procedures manual. Only three agencies reported having these: one from each of the three establishment periods.

5.4 Promotion and Advertising

As shown in Table 10, when asked how they promote or advertise their homesharing agency's services, 17 of the 18 existing agencies reported distributing flyers or leaflets, 17 reported advertising in local newspapers, 16 reported advertising on radio or TV, 12 placed posters in community facilities, seven utilized outdoor/bus advertising and seven used direct mailings. Other techniques used by 4-5 agencies included press releases, community information displays and telephone calls to prospective clients.

Thirteen of the agencies reported that word of mouth was a major way in which clients found out about their services; 13 received referrals from other community service agencies.

Eleven of the 18 agencies reported that their promotion was targetted to seniors, six reported targetting advertising materials to professionals who work with seniors, five to younger home seekers, four to singles, two to women and one each to families, single parents and persons below the poverty level.

The most noticeable difference between agencies established early in the 1980's and those established recently was in the newer agencies lesser use of such promotional vehicles as outdoor/bus advertising, direct mailings, press releases and community information displays. More of the newer agencies, on the other hand, used telephone contact as a way of marketing their services.

Among the agencies that had ceased operation, newspaper ads and articles were the most frequent publicity devices that had been used (five agencies); followed by posters in community facilities (four agencies), and radio and TV advertising. Only two of the six closed agencies in contrast to 17 of the 18 existing agencies had advertised by means of flyers and leaflets; only one had tried outdoor-bus advertising, community information displays or telephoning prospective clients. While five of the six agencies had targetted their advertising to seniors, only two had targetted any other groups: in one case professionals and in one case single parents. Only three of the six agencies reported having received referrals from other community service agencies.

TABLE 10

TECHNIQUES USED IN PROMOTION/ADVERTISING AGENCY SERVICES

| | Year Established | | | Total (n=18) |
|---------------------------------|------------------|------------------|-------------------|-----------------|
| | 1980-83 (n=5) | 1984-85 (n=3) | 1986-88 (n=10) | |
| Flyer/leaflet distribution | 5 | 3 | 9 | 17 |
| Local newspaper | 4 | 3 | 10 | 17 |
| Radio/TV advertising | 4 | 2 | 9 | 16 |
| Posters in community facilities | 5 | 2 | 5 | 12 |
| Outdoor/bus advertising | 3 | 1 | 3 | 7 |
| Direct mailing | 2 | 2 | 3 | 7 |
| Press release | 3 | 0 | 2 | 5 |
| Community information displays | 2 | 2 | 1 | 4 |
| Telephone | 0 | 0 | 4 | 4 |

5.5 Evaluation Experience

Among the agencies established between 1980-83, two had been formally evaluated -- one by its funding agency and the other, once by an independent researcher and a second time by the local Health Department. Of the remaining three agencies, one reported that an evaluation was in the planning stages, one reported that it was scheduled for evaluation as part of an ongoing quality assurance program of its parent agency and one said no evaluation had been conducted or was planned.

Only one of the three agencies established between 1984-85 had been formally evaluated. The evaluation was conducted by a student.

Among the ten newest agencies two had been evaluated by their parent agencies and one by a committee that reviews all agencies funded by the region. Two others had been informally reviewed by their Coordinators. The other five had not been in existence long enough for an evaluation to be appropriate.

6. MANAGEMENT AND STAFFING

6.1 Board of Directors

As shown in Table 11, 15 of the existing agencies have a Board of Directors or an Advisory Committee and nine (seven of which were established between 1986 and 1988) have a written description of the Board's function.

Among the six agencies that had ceased operations, only two had a Board of Directors. In both cases, there was a written description of their function.

6.2 Number and Type of Staff

Sixteen of the 18 agencies have a Coordinator or Executive Director. . One of the remaining agencies is run on an ad hoc basis by three local area community workers assigned the task as part of their general workload; the other is run by two individuals who described themselves as "agents de promotion".

The Coordinator/Executive Director position is full-time and paid in two of the five agencies established in 1980-83, all three of the agencies established in 1984-85, and in seven of the ten established in 1986-88. Written job descriptions exist in most of the agencies with full-time Coordinators.

TABLE 11

MANAGEMENT AND STAFFING

| | Year Established | | | Total (n=18) |
|--|------------------|------------------|-------------------|-----------------|
| | 1980-83 (n=5) | 1984-85 (n=3) | 1986-88 (n=10) | |
| Have Board of Directors/ Advisory Committee | 4 | 3 | 8 | 15 |
| Have written description of Board's function | 1 | 1 | 7 | 9 |
| Have Coordinator/ Executive Director | 4 | 3 | 9 | 16 |
| Full-time paid | 2 | 3 | 7 | 12 |
| Part-time paid | 2 | 0 | 1 | 3 |
| Volunteer | 0 | 0 | 1 | 1 |
| Have written job description of Coordinator's position | 2 | 2 | 7 | 11 |

In addition to the Coordinator, 12 agencies have one or more other paid staff. Generally, these consisted of an Assistant Coordinator and/or clerical or secretarial help but in three agencies their tasks relate explicitly to public relations, publicity and promotion. Eight agencies have volunteers who perform clerical tasks, do telephone intake, check references, or do some client interviewing.

Overall, staffing was minimal in the agencies that had ceased operations. Only three had a Coordinator. In all three cases she worked part-time; in two cases with no other staff and in one case, without a formal job description.

Of the remaining agencies, one was administered by two part-time assistants; one was administered by a service worker assigned for 25% of her time to the agency; one was administered by an individual described as a counsellor.

Examination of the educational background of the 16 Coordinators of existing agencies indicated that two had a Masters degree and ten had a Bachelor's degree. Fields of study represented included Family Studies, General Arts, Nursing, Psychology, Sociology and Social Work.

Only five of the Coordinators had had experience in working with seniors prior to entering their current position. Only one had had any specialized training in Gerontology.

6.3 Recommended Qualifications for Agency Coordinators

In each of the existing agencies, the Coordinator was asked what qualifications she felt were necessary to perform the job successfully. The following responses were obtained:

- Previous experience working with people (10)*
- Management and administrative skills (6)
- Communications/public relations skills (6)
- Social service background (5)
- Flexibility/adaptability (5)
- Counselling skills (4)
- Sensitivity to needs of the elderly (3)
- Familiarity with the community (2)
- Interviewing skills (2)
- Negotiating skills (1)
- Creativity (1)
- Ability to drive and access to a car (1)

6.4 Staff Training

When the 12 agencies employing more than just a Coordinator and/or having the services of volunteers were asked if staff were provided with any form of training, 11 said "yes". Six of these agencies provided in-house training, that is, the Coordinator trained junior staff and volunteers in the procedures employed by the agency and the skills necessary to do their work effectively. Interviewing skills were specifically mentioned by three agencies. One agency mentioned that they had produced a manual to guide volunteers in carrying out their tasks.

Four of the twelve agencies took advantage of external training opportunities such as sending staff to workshops sponsored by the Provincial Ministry of Housing or by other agencies.

* Number in brackets indicates the number of agency Coordinators mentioning the qualification.

Two agencies profited from instruction from their parent agency.

When provided via workshops, training tended to address specific issues such as developing sensitivity to cultural differences, and approaches to working with difficult clients. In contrast, when provided by their parent agency, training usually centred around such fundamentals as office procedures and interviewing skills.

6.5 Changes Over Time in Management and/or Operational Procedures

When asked what changes there had been to the management and operations of their agency since it originated, the most frequent response related to changes in systems and staffing. For example, five of the existing agencies reported an increase in staff. In two cases, the Coordinator's position had increased from part- to full-time; in three cases new staff positions had been added. These new positions consisted of a part-time clerk in one agency, and a part-time assistant in the other two agencies.

Four agencies reported having acquired a computer in the period since establishment.

Three agencies had added items to the forms they use to screen clients and/or otherwise had refined these forms.

One agency reported they no longer use volunteers as a result of a confidentiality breach.

As shown in Table 12, a small number of agencies also reported changes in their matching and outreach procedures. Specifically, two agencies reported that they now check references or for police records; one agency reported that, whereas in the past it had been primarily a housing registry, it now interviews clients for homesharing; one agency reported placing more emphasis now on promotion and advertising.

TABLE 12
CHANGES IN MANAGEMENT AND OPERATIONS SINCE ESTABLISHMENT

| | Year Established | | | Total (n=18) |
|--|------------------|------------------|-------------------|-----------------|
| | 1980-83 (n=5) | 1984-85 (n=3) | 1986-88 (n=10) | |
| <u>Systems and Staffing</u> | | | | |
| Increased staff | 1 | 2 | 2 | 5 |
| Acquired a computer | 2 | 1 | 1 | 4 |
| Refined/added to forms | 0 | 1 | 2 | 3 |
| Have restricted use of volunteers | 0 | 0 | 1 | 1 |
| <u>Matching Procedures</u> | | | | |
| Check references/police records now | 0 | 1 | 1 | 2 |
| Now interview clients (previously mostly a registry) | 0 | 1 | 0 | 1 |
| <u>Outreach</u> | | | | |
| Increased promotion/ advertising | 0 | 0 | 1 | 1 |

6.6 Perceived Management and Operational Strengths

Listed below are responses to the question "Can you identify any operational and management procedures that make your agency a successful service?" To facilitate interpretation, responses have been grouped into the four categories: systems and staffing, matching procedures, outreach and other.

Systems and Staffing

- staff meetings every 2 weeks (Coordinator and volunteers) to stay informed about caseload, to discuss interviewing, client information, techniques for improving the service (2)
- reliable, mature volunteers (1)
- good management committee (1)
- good record keeping system (e.g. colour coding of client cards indicating sex, characteristics that make him/her potentially difficult to match, etc.) (1)

- well-organized procedures (1)
- procedures and forms set up before service commenced operations (1)
- good staff (1)

Matching Procedures

- indepth/in-person interviews with clients (3)
- a lot of time/care spent in matching (2)
- thorough screening (2)
- lots of support/counselling provided (2)
- in-home assessment of home providers (1)
- background information package given to every client (1)
- preliminary matching on computer (1)
- Coordinator meets both provider and seeker (1)

Outreach

- being part of a network of seniors' services/good interagency liaison (6)
- good publicity and promotion of the service (e.g. use the local press by generating news stories about seekers or providers; socials/teas) (3)
- information session held once a month (1)

Other

- sound philosophy and belief in service (1)
- good location (e.g. free parking, easy access; bus close by; not in downtown area) (1)

6.7 Management and Operational Practices that Could be Improved

When asked to identify any management or operational procedures that require improvement or change, the following were mentioned:

Systems and Staffing

- improve record keeping (4)
- do more long-term planning (3)
- develop an organizational chart/job descriptions (3)
- computerize (2)
- improve/make forms more user-friendly (2)
- increase/improve orientation/training given to staff, students and volunteers (2)
- increase staff (2)
- streamline use of volunteers (1)
- streamline reporting system to the Province (1)
- reduce the number of supervisors agency needs to report to (1)

Matching Procedures

- check/improve the reliability of references (2)
- spend more time with providers after a match is made (1)
- clarify extent to which agency can "discriminate" in making a match, that is, take into consideration potential sharers' religion, ethnic background, etc. (1)

Outreach

- increase familiarity/networking with other services (2)
- do more outreach (1)
- improve quality of information given to clients (1)
- develop advertising material which clearly indicates homesharing is not a maid, dating or health care service (1)

Other

- obtain private interview space (1)
- develop a permanent funding base rather than having to rely on project funding (1)

7. THE CLIENTS

7.1 Restrictions on Clients Served

As shown in Table 13, eight of the 18 existing agencies require that at least one person in a match be aged 55 or over, one agency requires that at least one person be 55+ or a single parent while one agency requires that at least one person, preferably the home provider, is at least age 50. The remaining eight agencies require only that those seeking a match be of adult age. The finding that only approximately half (55.6%) of the agencies explicitly require that one member of the match be older is similar to data obtained by Jaffe and Howe (1988) in their survey of American homesharing agencies. Also in similarity to the American experience, while most agencies were originally established to serve the elderly, in some this aim was modified over time. For example, three agencies reported having started out requiring that both home seeker and home provider be 55+ but, due to difficulty in recruiting seekers, changed the requirement to only one in a match having to be 55+. For the same reason, one agency that started out requiring that at least one member of the match be 50 or over now has no age restrictions.

While in Canada no agencies currently restrict their services only to the elderly (i.e. require that both members of the match be age 50+ or 55+), Jaffe and Howe (1988) report that 12% of American agencies still do so.

Another common restriction relates to geographic location. Fifteen of the agencies restrict their services to clients in a circumscribed geographic area. One agency, it should be noted, reported that, over time, the geographic area they serve has been expanded due to demand.

Eleven agencies will not match a home seeker having a drug or alcohol problem. However, several agencies reported that, while drug/alcohol abuse on the part

of the home provider is taken into consideration, it does not automatically preclude a match.

Mental health problems are also given less weight in the case of home providers than home seekers. Only one agency stated it would not make a match if the home provider had a mental health problem; nine said they would not match a home seeker who had a mental health problem.

Other restrictions mentioned by a minority of agencies related to: independence in activities of daily living (7); household type (some will not match seekers who are couples or families) (5); length of time on the registry (3); financial status (2); possession of a criminal record (1).

The agency that does not match persons with a criminal record reported that this restriction had been added subsequent to establishment of the agency.

Two other agencies had added restrictions subsequent to establishment, in both cases relating to drug/alcohol abuse, one because of a bad experience, the other, because it felt abusers were too risky to place.

When the data were examined in terms of period of establishment, it was apparent (Table 14) that age and geographic restrictions are more prevalent in the older agencies, while restrictions relating to drug/alcohol abuse, mental health and independence in activities of daily living are more prevalent in the newer agencies.

A higher proportion of existing than closed agencies restrict service on the basis of location (83.3% vs. 50%), age (61.1% vs. 50%), drug/alcohol abuse by the provider (61.1% vs. 50%), drug/alcohol abuse by the home seeker (61.1% vs. 16.7%) and on the basis of household type (20-27% vs. 0%). Agencies no longer in operation, on the other hand, were more likely to restrict service on the basis of level of performance of activities of daily living (50.0% vs. 38.8%) and length of time on the registry (33.3% vs. 16.7%).

TABLE 13
RESTRICTIONS ON CLIENTS SERVED

| | Year Established | | | Total (n=18) |
|---|------------------|------------------|-------------------|-----------------|
| | 1980-83 (n=5) | 1984-85 (n=3) | 1986-88 (n=10) | |
| <u>Geographic</u> | 5 | 3 | 7 | 15 |
| <u>Drug/alcohol abuse</u> | | | | |
| Provider | 2* | 2* | 7* | 11* |
| Seeker | 2 | 2 | 7 | 11 |
| <u>Age</u> | | | | |
| At least one must be 55+ | 5 | 1 | 2 | 8 |
| At least one must be 55+ or a single parent | 0 | 0 | 1 | 1 |
| At least one must be 50+ | 0 | 0 | 1 | 1 |
| <u>Mental health</u> | | | | |
| Provider | 0 | 0 | 1 | 1 |
| Seeker | 2 | 0 | 7 | 9 |
| <u>Independence in activities of daily living</u> | | | | |
| Provider | 1 | 1 | 5 | 7 |
| Seeker | 1 | 1 | 5 | 7 |
| <u>Household type</u> | | | | |
| Provider | 1 | 2 | 2 | 5 |
| Seeker | 1 | 1 | 2 | 4 |
| <u>Length of time on registry</u> | | | | |
| Provider | 1 | 1 | 1 | 3 |
| Seeker | 1 | 1 | 1 | 3 |
| <u>Financial</u> | | | | |
| Provider | 0 | 1 | 0 | 1 |
| Seeker | 1 | 0 | 1 | 2 |
| <u>No criminal record</u> | | | | |
| Provider | 0 | 0 | 1 | 1 |
| Seeker | 0 | 0 | 1 | 1 |

* Under some circumstances

7.2 55+ Client Profiles

Each of the existing agencies was asked to provide information concerning their currently registered clients aged 55 and over. The information requested included the number who were home seekers and the number who were home providers, their age, sex, marital status, and their reason for sharing.

a) Number and proportion of home providers vs. home seekers

In total, information was obtained for 997 clients. Of these, far more were home providers (790 or 79.2%) than home seekers (207 or 20.8%).

b) Clients' age, sex and marital status

Home providers tended to be older than home seekers. As shown in Table 14, 34.7% were aged 75 or over compared with only 15.9% this old among the seekers.

Approximately three-quarters (78.4%) of the home providers and two-thirds (62.8%) of the home seekers were female. The vast majority (over 90%) of both providers and seekers were single, either widowed, divorced or never married.

TABLE 14

SOCIO-DEMOGRAPHIC CHARACTERISTICS OF
REGISTERED CLIENTS AGED 55+ (N=997)

| | <u>Providers</u> | | <u>Seekers</u> | |
|-----------------------|------------------|----------|----------------|----------|
| | <u>n</u> | <u>%</u> | <u>n</u> | <u>%</u> |
| <u>Sex</u> | | | | |
| Female | 619 | 78.4 | 130 | 62.8 |
| Male | 171 | 21.6 | 77 | 37.2 |
| <u>Marital Status</u> | | | | |
| Single | 749 | 94.8 | 202 | 97.6 |
| Couple | 38 | 4.8 | 5 | 2.4 |
| Family | 1 | 0.1 | 0 | 0.0 |
| Missing data | 2 | 0.3 | 0 | 0.0 |
| <u>Age</u> | | | | |
| 55-64 | 207 | 26.2 | 93 | 44.9 |
| 65-74 | 255 | 32.2 | 68 | 32.9 |
| 75 + | 274 | 34.7 | 33 | 15.9 |
| Exact age unspecified | 54 | 6.8 | 13 | 6.3 |

c) Reasons for homesharing

When reasons for homesharing were examined (Table 15), it was apparent that among the 779 providers for whom information was available, a desire for companionship was the most common motivational factor.

More than half (58.5%) of the providers gave this as their reason for wishing to enter into a homesharing arrangement. Approximately one third (34.5%) were motivated by a need to reduce shelter costs and one-quarter (25.0%) by a need for assistance in maintaining the home or garden or with personal care. The only other motivating factor mentioned by at least 10% of the providers was a desire for the security provided by having another person in the home (14.6%).

As shown in Table 15, a higher proportion of home seekers (n=201) than home providers (41.8% vs. 34.5%) mentioned financial considerations as their reason for wishing to homeshare. As with the home providers, however, companionship still emerged as the most common reason for homesharing (51.7%).

TABLE 15

REASONS FOR HOMESHARING

| | <u>Providers</u> | | <u>Seekers</u> | |
|---------------------------------|------------------|----------|----------------|----------|
| | <u>n</u> | <u>%</u> | <u>n</u> | <u>%</u> |
| <u>Reasons for Homesharing*</u> | | | | |
| Companionship | 456 | 58.5 | 104 | 51.7 |
| Financial | 269 | 34.5 | 84 | 41.8 |
| Require Assistance | 195 | 25.0 | 6 | 3.0 |
| Stability/Security | 114 | 14.6 | 14 | 7.0 |
| Improve Shelter Quality | 0 | 0.0 | 9 | 4.5 |
| Other | 12 | 1.5 | 26 | 12.9 |

* More than one response permitted

When the data were cross-tabulated by age (Table 16), it was apparent that among home providers the desire for companionship, a need for assistance and a desire for stability/security served as motivating factors for increasing proportions as age increased from 55-64, to 65-74 to 75+. Financial concerns, on the other hand, figured less prominently as age increased. The latter trend appeared in both the home provider and the home seeker data.

TABLE 16

REASONS FOR HOMESHARING, PROVIDERS AND SEEKERS, BY AGE (%)

| | | <u>55-64</u> | <u>65-74</u> | <u>75+</u> |
|---------------------------------|---|--------------|--------------|------------|
| <u>Reasons for Homesharing*</u> | | | | |
| Companionship | P | 49.0 | 63.3 | 60.7 |
| | S | 62.0 | 46.2 | 48.4 |
| Financial | P | 57.4 | 31.1 | 17.6 |
| | S | 48.9 | 40.0 | 25.8 |
| Require Assistance | P | 9.8 | 21.9 | 42.6 |
| | S | .1 | 1.5 | 12.9 |
| Security | P | 10.3 | 13.9 | 20.2 |
| | S | 9.8 | 3.1 | 9.7 |
| To Improve Quality of Shelter | P | 0.0 | 0.0 | 0.0 |
| | S | 5.4 | 3.1 | 3.2 |

* More than one response permitted

P = Providers

S = Seekers

7.3 Perceived Changes in Clients Seeking Service

Each agency was asked "Do you think that the characteristics of your elderly clients have been changing over the length of time this homesharing agency has been in operation?"

Among the five agencies established in 1980-83, three felt their elderly clients had changed. The changes described were as follows:

- "Before, people had a more desperate need for housing. There is lots more affordable housing available now due to high vacancy rate."
- "There are more elderly seekers now, more variety in personalities, socio-economic groups and reasons for homesharing. The elderly are more able to admit they want companionship. There are more younger people with alternate lifestyle reasons for sharing as well as or instead of financial reasons."
- "People are older now. Also, more requests are coming from people in institutions who want to move out."

These reasons were echoed by the two agencies established in 1984-85 who perceived a change in clients. (The third was unable to comment as staff were new to the job.)

- "Clients are older now and more living in institutions want to homeshare."
- "We are getting more requests now for companions from older elderly with needs."

Only one of the ten newer agencies felt clients had changed. This agency reported that "Recently, seniors coming to the program have wanted more home assistance than previously. Up until recently their needs have been financial or for companionship." This Coordinator also felt that whereas previously clients had been predominantly middle class, there had been a shift to the lower income brackets.

8. MATCHES

8.1 Number of Matches Made

As shown in Table 17, there was a considerable range in the total number of matches made by the agencies currently in operation -- from zero as of March, 1988, the cut-off date for this report, in one of the newest agencies (established formally in February 1988) to 339 in an agency established in 1985. The latter agency, it should be noted, matches persons of all ages. It estimated that in the past year, only from 11-13% of the matches made had involved at least one person aged 55 or over.

Of the six agencies no longer in operation, two had made no matches despite having been open, in one case for 1 and in the other, for approximately three years; three had made from two to 12 matches after having been in operation for from seven months to 1 years, while one had made approximately 100 matches. This latter agency was in operation for four years.

TABLE 17

NUMBER OF MATCHES TO MARCH 31, 1988

| | Year Established | | | Total (n=18) |
|---------|------------------|------------------|-------------------|-----------------|
| | 1980-83 (n=5) | 1984-85 (n=3) | 1986-88 (n=10) | |
| 0-9 | 0 | 0 | 5 | 5 |
| 10-19 | 0 | 0 | 3 | 3 |
| 20-49 | 0 | 1 | 1 | 2 |
| 50-99 | 2 | 0 | 1 | 3 |
| 100-149 | 2 | 1 | 0 | 3 |
| 150-299 | 1 | 0 | 0 | 1 |
| 300 + | 0 | 1 | 0 | 1 |

8.2 Reasons for Dissolution of Matches

Data were available on the reasons for dissolution of 119 matches. As shown in Table 18, by far the most common reason for dissolution was incompatibility/irreconcilable differences between the sharers (38.7%).

TABLE 18

REASONS FOR DISSOLUTION OF MATCHES

| | |
|--|-----|
| Incompatibility/irreconcilable differences | 47 |
| Change in seeker's status | 17* |
| Found own housing unit | 10 |
| Desire to relocate | 10 |
| Quality of accommodation | 9 |
| Death or illness | 5 |
| As planned | 4 |
| Required higher level of care | 4 |
| Home sold | 2 |
| Remarriage of homeowner/seeker | 2 |
| Moved in with family member | 1 |
| Unknown | 5 |
| Other | 3 |

* Nature of change not explained

In interpreting this finding it is important to bear in mind Jaffe and Howe's (1988) point that where "incompatibility" is given as the reason for the

dissolution of a match, the underlying mechanism may be structural changes in the lives of the homesharers which make them less willing to get along with each other. That is, many individuals undertake homesharing at transition points in their lives, and as these instabilities are resolved (e.g. as decisions are gradually made about jobs, education or social life, or as the impact of illnesses becomes clear) "their willingness to adapt to the homesharing arrangement and to the idiosyncracies of the other is compromised" (p.323).

8.3 Intergenerational Matches

As indicated earlier in this report, due to a shortage of elderly home seekers several agencies have changed from requiring that both members of a match be elderly to requiring a minimum age of 50 or 55 for only one of the sharers. It should be noted that in the literature, there is some suggestion that intergenerational matches (i.e. those involving one person under and one over age 55), rather than being a regrettable necessity, may actually be more successful than peer matches. The reasoning is that the possibility of conflict is reduced if housemates are not together all day (Schreter, 1985; Pilon, 1986). There is also thought to be greater potential in intergenerational than in peer matches for one of the housemates to provide assistance to the other.

In an effort to ascertain the proportion of intergenerational matches made by Canadian homesharing agencies, agencies participating in the study were asked to examine their active files and, for all matches involving at least one person aged 55+, provide the ages of both sharers. Fifteen of the 18 agencies did so, yielding data on 155 matches. When these data were cross-tabulated by the age of the provider and the age of the seeker (see Table 19), it was apparent that 119 matches (76.8%) were between persons one of whom was over and the other under age 55.

While these data do not tell us what proportion of all matches were intergenerational, data from Ontario (Spence and Boyd, 1988) place the figure at 36%. This proportion is similar to 35% reported by the Shared Housing Quarterly (1988). Other U.S. sources, however, show a majority of matches to be intergenerational. For example, in their study of American homesharing agencies, Jaffe and Howe (1988) found that although 56% of the agencies surveyed require that one member of the match be older, in 43% of agencies over two-thirds of the matches made were intergenerational. Fengler and Danigelis (1985) report that a majority of homesharing agreements seem to be between persons at least 20 and often close to 40 years apart in age.

TABLE 19

CURRENT MATCHES WHERE AT LEAST ONE PERSON IS 55+
BY AGE OF SEEKER AND PROVIDER

| <u>Providers</u> | <u>Specific Ages Available</u> <u>Seekers</u> | | | | | <u>Total</u> |
|------------------|--|--------------|--------------|--------------|------------|--------------|
| | <u>35 Years</u> | <u>36-54</u> | <u>55-64</u> | <u>65-74</u> | <u>75+</u> | |
| <u>35 years</u> | N/A | N/A | 0 | 1 | 0 | 1 |
| <u>36-54</u> | N/A | N/A | 2 | 1 | 1 | 4 |
| <u>55-64</u> | 18 | 14 | 3 | 2 | 2 | 39 |
| <u>65-74</u> | 14 | 20 | 5 | 2 | 1 | 42 |
| <u>75+</u> | 18 | 15 | 7 | 3 | 5 | 48 |
| <u>TOTAL</u> | 50 | 49 | 17 | 9 | 9 | 134 |

| <u>Providers</u> | <u>Specific Ages Not Available</u> <u>Seekers</u> | | <u>Total</u> |
|------------------|--|------------|--------------|
| | <u>54 Years</u> | <u>55+</u> | |
| <u>54 years</u> | N/A | 2 | 2 |
| <u>55+</u> | 13 | 6 | 19 |
| <u>TOTAL</u> | 13 | 8 | 21 |

9. IMPACT AND OBSTACLES TO HOMESHARING**9.1 Perceived Impact of Homesharing**

Each agency was asked: "What do you consider to be the impact of your homesharing agency on the range of housing choices for the independent elderly in your community?"

Three of the five agencies established in 1980-83, all three of those established in 1984-85 and one of the ten established in 1986-88 replied in terms of homesharing per se rather than in terms of the functioning of their agency. All stated they felt that the impact of homesharing was small. They noted, however, that:

"If people are willing to consider homesharing, it does have an impact."

"It's not well enough known but the potential is there."

"It does release housing for others -- therefore it has an impact on the whole housing situation."

"We are the only agency that can offer a sense of companionship and a sense of security at home."

"It potentially has an impact but outreach is needed."

Of the remaining 11 agencies, two felt they had not been in operation long enough to answer the question and three felt they had had an impact -- two by keeping people out of homes for the aged and one by freeing up rental space. The rest spoke about:

- providing a viable choice to people who don't want to move and/or whose main problem is loneliness (4);
- providing housing to people temporarily on low income (1);
- helping people waiting for non-profit or institutional placement (1);
- increasing the number of housing options available to the elderly (1).

2. Perceived Obstacles to Homesharing

When asked "What do you consider to be the obstacles to homesharing in your community?", answers included:

- lack of public awareness or knowledge about the nature of homesharing and/or homesharing agencies -- in particular, misperceiving it as a dating or maid service (7)
- resistance by seniors to the idea of homesharing, in particular because of fear of losing their independence (6)
- shortage of seekers (5)
- fear, especially among home providers, of the risks involved in taking in a stranger (3)
- inflexibility on the part of home providers; "the home provider must allow the home seeker to 'live' in the house". (3)
- referral agencies don't take homesharing seriously "It's considered a 'light' service in comparison to income maintenance programs." (2)
- unrealistic expectations of clients. For example, some elderly home providers were described by agency Coordinators as expecting the sharer to provide him/her with care and attention, and free housekeeping services "such as might be provided by a wife" (2).
- language/cultural barriers both in terms of willingness to share and accessibility of services (2)
- concern and misunderstanding about the type of people being served, for example, stereotyping them as poor and on welfare (2).
- availability of other housing options/services (2)
- concern that there may be hidden costs (1)
- people confuse it with a housing registry (1)
- too many restrictions (e.g. age, need for references) (1)
- inadequate interview space (1)
- hours too restrictive for clients (1)
- families looking for personal care (1)

These data are in keeping with Jaffe and Howe's observation that:

...The recruitment difficulties and small size of these programs are...reflections of the reluctance of many potential homesharing

candidates to live with a stranger. Most people do not expect or wish to share living quarters with someone they do not know, and will consider it only if their need is pressing. Such need may come in a variety of forms: the necessity of increasing income, the need for help with activities of daily living, the fear of crime or accident, or the impossibility of finding an affordable apartment. Even though program staff actively recruit applicants and many potential clients experience pressures that push them toward sharing, overcoming the reluctance is still difficult. Many applicants are seen, but relatively few matches are effected...(p.320).

Jaffe and Howe (1988) also contend that the low proportion of matches to applicants reflects people's unrealistic expectations about homesharing.

...Among elderly homesharers, particularly, this commonly took the form of what one program director called the "fairy godmother syndrome". They were willing to share as long as the live-in would be a middle-aged or older woman, in good health, good natured, and willing to devote herself to care of her housemate...Wanting a live-in who would basically be a servant was a slightly different version of the same problem. (p.320).

One result of this reluctance, according to Jaffe and Howe (1988), is that older homeowners frequently do not apply to homesharing agencies until they are so frail they cannot manage with only a homemaker. This, in turn, makes them difficult to match. The experience of most American programs is that few home seekers are willing to move in with a person who requires substantial help.

10. SUMMARY, DISCUSSION AND RECOMMENDATIONS

The purposes of this study were to describe Canadian homesharing agencies serving the elderly, identify their place in the shelter-care continuum and test four hypotheses relating to their objectives, structure and clientele.

The foregoing chapters have described various aspects of these agencies' operations as well as the socio-demographic characteristics of their 55+ clients. The place of these agencies (and of homesharing by the elderly) in the shelter-care continuum, which in Canada is clearly at the shelter end, was discussed in Section 2.4.

What remains to be discussed, and is the focus of this chapter, is the extent to which the findings support the study's hypotheses, the impact of period of establishment and the differences between those agencies which have survived and those which have not.

10.1 Support for Study Hypotheses

Hypothesis 1:

Within the agency-assisted model, there exists a diverse range of objectives, organizational structures and services offered.

Upon reviewing the objectives of the 18 existing agencies, it was apparent that meeting housing needs, particularly affordability needs, was the primary objective of 10 agencies. Three agencies saw relieving problems of isolation by providing elderly persons with companionship and the security of having another person in their home as their first objective. One agency gave equal weighting to housing and companionship/security. Four agencies considered that assisting older people to remain independent was their most important task. With the exception of four of the newest agencies, all of which are in Ontario, however, all other agencies mentioned all three of the above as objectives, thus exhibiting greater similarity than diversity where objectives are concerned.

The agencies were also similar in that a majority (14 agencies) were under private non-profit sponsorship; all depend on public funding, either directly or indirectly; and virtually all fit the referral/counselling model.

Where diversity was most apparent was in terms of their degree of independence, staffing complement, physical space and financial stability.

In terms of organizational independence, two forms were found to predominate, the intermediate form (8 agencies) and the advanced form (8 agencies). Intermediate agencies, while providing a separate service, are part of a larger program or department. Advanced agencies, although they may have links with other groups, exist as separate entities.

Diversity was even more apparent in the staffing of the agencies participating in the study. While 16 of the 18 agencies had a Coordinator or Executive Director, the total number of paid staff ranged from one program run entirely by volunteers to several with two or more paid full-time equivalents. The literature (e.g. Kaufman, 1983) strongly suggests that at least one full-time equivalent staff person is required to operate a successful homesharing agency. It appears that "simple" or small agencies which rely heavily on staff who have other on-going responsibilities, such as five of those no longer in operation, have limited potential for survival.

The geographic location of the 18 agencies and the physical space they occupy also varied considerably. As indicated in Chapter 3, eight are located in the downtown centre, eight are in mixed residential-commercial industrial areas, one is in an industrial/commercial area and one, while planning to relocate, at the time of the site visit was in an outlying area. The building type in which their offices are located was also found to differ, from a less than ideal placement on the lower floor of a shopping mall, a location that is neither physically accessible nor readily found by clients, to a standard office building serving as "home" to other service agencies. While in most cases the study site visitor felt the office space occupied by the agency was adequate, in six agencies problems with noise, lack of privacy and/or lack of space were noted.

It is strongly recommended that agencies be located in a central location where they can be easily accessed, using public transportation, by potential home seekers who, in contrast to home providers, are usually expected to come to the agency's office to be interviewed.

A preferred location is in an office building occupied by other community organizations. An office building gives the agency a professional and business-like look; proximity to other agencies maximizes the potential for referrals.

A seniors centre seems to be a less than ideal location from which to attract home seekers under age 65.

Both outside and inside the building there should be signage clearly identifying the location of the agency's offices.

There should be no physical barriers either inside or outside the building. While only a small proportion of home seekers will likely be in wheelchairs, others may have mobility impairments or health problems that make stair climbing difficult.

Several of the agencies visited in the present study did not have private space for interviews and/or were noisy.

Recognizing that most home seeker interviews will be conducted in the agency's office, sufficient private space must be obtained to ensure client confidentiality. Secure storage of agency records is also a must.

Funding is another area in which some strong recommendations follow from the study. One of the most obvious findings was that a majority (12/19) of the homesharing agencies in operation in 1987-88 were in Ontario. While most developed and evolved independently, currently all Ontario agencies are firmly under Provincial government funding.

Not only has Ontario provided a reliable source of adequate funding, but it also provides a network (annual meetings) and support materials.

Ontario is the only province where agencies are proliferating and in evidence in both small and large communities.

Following the lead of Ontario, all Provincial governments should give serious consideration to providing on-going support to homesharing agencies. Provincial government support not only gives these agencies time to develop and become an integral part of the seniors' housing continuum but also gives them credibility, facilitating referrals from other community organizations.

Hypothesis 2:

In matches involving older persons, intergenerational matches (one person over and one under age 55) predominate.

As indicated in Section 8.3, the veracity of this hypothesis was tested by asking the agencies participating in this study to examine their active files and, for all matches involving at least one person aged 55+, provide the ages of both sharers.

Examination of data provided (155 matches) indicated that the hypothesis was supported, with 76.8% of matches being between persons one of whom (usually the home provider) was over and the other (usually the homesharer) was under age 55.

Remaining to be tested in future studies is the hypothesis (Schreter, 1985; Pilon, 1986) that intergenerational matches are more successful than those in which both sharers are elderly.

Hypothesis 3:

A homesharing agency requires a considerable degree of "lead time" to establish itself in the community as a creditable and legitimate service.

Evidence bearing on this hypothesis is mainly indirect and comes primarily from questions asking the agencies what they considered to be the impact of their homesharing agency on the range of housing choices for the independent elderly in their community and from their perception of obstacles to homesharing.

Responses to both these questions suggest that it takes time and effort, on the part of an agency, to make potential sharers aware of what services a homesharing agency can and cannot provide, to break down negative stereotypes about homesharing and homesharers, and to become known to and gain the confidence of other agencies in a position to refer clients.

Towards this end it is strongly recommended that promotion and advertising be targetted to three groups:

- a) homeowners aged 55 and over
- b) potential home seekers of all adult ages
- c) all community agencies in a position to refer clients

In terms of content, promotion and advertising should both indicate the services offered by the agency and clarify and promote the homesharing concept. To these ends it should:

- a) clearly state what homesharing is and what it is not.
- b) clarify the role and function of homesharing agencies, distinguishing them from a housing registry, dating, maid or personal care service.
- c) address potential home providers' fears about hidden costs.
- d) indicate that rather than leading to loss of independence, homesharing can provide a means whereby home owners and home seekers can gain independence.

- e) counteract negative stereotypes about the type of persons who enter into this type of living arrangement (e.g. that they are poor people on welfare).
- f) counteract language or cultural barriers to homesharing or accessing services.

Initially, a variety of methods should be employed to promote and advertise homesharing and the homesharing agency's services. These should be objectively evaluated over a period of several months in order to ascertain which are and are not effective in recruiting clients in the agency's locale.

Hypothesis 4:

The degree of "formality" of an agency influences the clients it attracts and/or the services it offers.

As a first step in testing this hypothesis, a "formality" index was developed and "formality" scores for each agency were calculated.

Items included in the index and their weights were as follows:

Objectives: written statement of objectives (2 points); agency's purposes otherwise stated, for example, in a marketing brochure (1 point)

Role/job descriptions: for Board or Advisory Committee (1 point); for Coordinator and/or other staff (1 point)

Needs assessment: formal (2 points); informal (1 point)

Organizational plan: formal (2 points); informal (1 point)

Business or marketing plan: yes (1 point)

Policy and/or procedures manual: yes (1 point each)

Evaluation: formal evaluation carried out (3 points); informal evaluation carried out (2 points); evaluation planned (1 point)

Record-keeping: records permit not only matching of current clients but an assessment of the agency's performance over time (2 points)

The distribution of scores is shown below:

| <u>Score</u> | <u>No. of Agencies</u> |
|--------------|------------------------|
| 2 | 1 |
| 6 | 2 |
| 7 | 2 |
| 8 | 4 |
| 9 | 2 |
| 10 | 3 |
| 11 | 2 |
| 12 | 1 |
| 14 | 1 |

Overall, the median and mean scores on this 16-point index were, respectively, 8.5 and 8.7.

When the agency with the very low score of two was omitted, no difference was found between the mean "formality" score of the nine agencies which stipulated that at least one member of a match be aged 50/55+ (9.1) and the eight agencies requiring only that sharers be of adult age (9.0). The degree of "formality" of an agency, in other words, does not seem to influence the type of clients it serves. The type of services offered also appears to be unrelated to the degree of agency formality, since as noted in Section 4.2, virtually all (16/18) fit the "referral/counselling" model.

"Formality" scores and agency form did, however, seem to be related. The two "simple" agencies had "formality" indices of 2 and 8 respectively. The eight "intermediate" agencies had scores ranging from 6 to 14, with a mean of 8.6. The eight "advanced" agencies ranged from 6 to 13 with a mean of 9.6. It appears from these data that "simple" and "intermediate" agencies, embedded as they are in other organizations, have less opportunity or requirement to formalize their operations than "advanced" agencies.

Formalization, in turn, seems to be an important element in terms of an agency's ability to make matches.

When the agencies were split into those with "formality" scores falling below the median (scores of 2-8) and those above it (scores of 9-14), agencies with higher "formality" scores were found to have made more matches per months in operation.

An obvious recommendation following from this finding is that agencies should be encouraged, as soon as possible after their establishment and if possible before, to develop a clear statement of objectives, role/job descriptions for their Board and staff, an organizational plan and a business plan.

Perhaps less obvious, is a strong recommendation that objectives be based on a full and thorough needs assessment.

Six of the existing agencies found it necessary to change objectives either because the needs of the group they had originally chosen to serve were being met by other agencies (e.g. the agency established to house teenagers), in

order to secure a sufficient number of clients and/or in order to secure sufficient funds to remain in operation.

Three of these agencies had not conducted a formal needs assessment prior to commencing operations.

Overall, in only half of the eighteen agencies was a needs assessment conducted.

The needs assessment should include identification of all other groups and agencies in the local community offering housing or related services to the target group. Staff of relevant agencies should be interviewed to ascertain whether they perceive a need for a homesharing match-up service and, if so, whether they would refer clients to it if it were to be established. Interviews should also be conducted with a representative sample of potential clients to ascertain feelings about homesharing in the local area.

In selecting this sample, the person conducting the needs assessment would be well advised to review the literature describing the socio-demographic characteristics of persons already homesharing as well as of applicants. For example, in this study and others (Kaufman, 1983; Dobkin, 1983; Schreter, 1985; Shared Housing Quarterly, 1988) potential home providers have been found to be predominantly single Caucasian women aged 75 and over. Males are more highly represented among home seekers who tend generally to be younger than home providers.

In addition to surveying other community agencies and potential clients, a thorough needs assessment should also include examination of current and projected population statistics. As well, statistics relating to the rental stock and rental charges in the local area should be examined.

For further information on assessing local seniors' housing needs and for sample data collection instruments see the Rural Seniors' Housing Assessment Package developed by G. Hodge and G. Gutman (1989) for the Canada Mortgage and Housing Corporation.

An efficient and effective method of documenting agency operations should also be established from the outset.

While the Ontario agencies are required to provide quarterly data on many aspects of their operations, including number of inquiries, interviews and matches, few of the other agencies participating in the study had the record keeping tools necessary to document their activities on a regular basis.

If homesharing is to grow and become a viable housing alternative, agencies need to develop methods to document day to day operating data and then summarize it regularly to find the answers to questions such as:

- * How many people are inquiring about/considering homesharing?
- * What is their reason for doing so?
- * How many interviews are conducted in a given time period?
- * How many introductions, on average, are necessary to make a match?
- * How long do matches last?
- * Why do matches dissolve?

* What methods of advertising work best?

The answers to these questions will help agencies to better understand the needs of current and potential clients, ascertain the strengths and weaknesses of their program, identify changes in demand for homesharing, and obtain more funding to reflect increased workloads.

10.2 Impact of Period of Establishment

The most noticeable differences between agencies established in 1980-83, 1984-85 and 1986-88 were as follows:

objectives - the oldest agencies (and those outside Ontario) are responding more to issues of isolation and enabling elderly persons to live in their own homes than are the newer agencies. These latter, and particularly agencies in Ontario, tend to be more strongly housing-oriented.

form - "simple" agencies are found only among agencies established in 1980-83. Among the ten newest agencies, six are "intermediate" and four are "advanced".

physical space - a greater proportion of older than newer agencies are in standard office buildings. A greater proportion of older than newer agencies have offices which are wheelchair accessible. A smaller proportion of the older agencies have problematic office space. Clearly identifiable locations, both from in and outside the building, are more commonly found in the newer agencies.

matching process - the older agencies more commonly check medical references; attending sharers' interviews is more common in newer agencies.

record-keeping - older agencies more commonly have procedures in place for recording/monitoring their activities on an ongoing basis.

clients served - age and geographic restrictions are more common in the older agencies; restrictions relating to driving/alcohol abuse, mental health and independence in activities of daily living are more prevalent in the newer agencies.

10.3 Differences Between Surviving and Closed Agencies

At the time of the site visits, six agencies were no longer in operation. Of these six, one had been located in B.C., one in Manitoba, one in Ontario while the remaining three were in Quebec.

The number of matches made by these agencies varied considerably. As noted in Section 8.1, two had made no matches despite having been open, in one case for 1 and in the other, for approximately three years; three had made from two to twelve matches after having been in operation for from seven months to 1 years; one had made approximately 100 matches over a four year period of operation.

Features which distinguish these agencies from the 18 participating agencies which are currently in operation include:

- a higher proportion with a "simple" organizational form (50% vs. 11.1% among the surviving agencies)
- a higher proportion under public as compared with non-profit sponsorship (50% vs. 11.1% among the surviving agencies)
- fewer matching services engaged in and fewer services offered over and above basic referral and counselling services
- fewer restrictions on client eligibility
- less "formality" as reflected in fewer records and forms and fewer agencies (only two) having had a Board of Directors or a formally designated Coordinator (only three agencies)
- less extensive advertising programs and
- fewer referrals received from other community agencies.

Many of these differences are a direct result of these agencies having had inadequate staffing (five of the six agencies and the 6th for part of the time had less than one full-time equivalent staff person). As Pritchard (1983) notes, to increase the population of prospective homesharers:

...calls for carefully planned community organization initiatives (i.e. creative publicity, community education strategies, and outreach efforts where appropriate). In order to accomplish these goals additional staff resources are necessary.

The implementation of the other recommendations made in Section 10.1 above are also necessary if a homesharing agency is to prove viable over an extended period of time.

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APPENDIX I

HOMESHARING AGENCIES IN CANADA SERVING THE ELDERLY
BY OPERATIONAL STATUS AS OF MAY, 1988
AND BY PROVINCE AND YEAR ESTABLISHED

| PROVINCE | CITY | AGENCY NAME | YEAR ESTABLISHED |
|----------|------|-------------|------------------|
|----------|------|-------------|------------------|

A. In Operation May 1988

| | | | |
|-------------------|----------------------------|---|---------------------|
| B.C. | Vancouver | Vancouver Homesharers Program | 1983 |
| Alberta | Edmonton | Homesharing | 1987 |
| Ontario | Thorold/Niagara | Homesharing | 1980 |
| | Toronto | Sharing | 1983 |
| | Ottawa | Ottawa-Carleton Match and Share | 1984 |
| | Don Mills | East York - Flemingdon Park Housing Registry | 1985 |
| | Scarborough | S.H.A.P.E.S. | 1985 |
| | Peterborough | Seniors Counselling and Coordination Society | 1986 |
| | Toronto York | York Housing Registry | 1985 |
| | Sault Ste Marie | Homesharing | 1987 |
| | North Bay | North Bay Home Share Program | 1987 |
| | London | London Housing Registry | 1987 |
| - City of Toronto | Kitchener/Waterloo | Homeshare | 1987 |
| | Etobicoke | Homeshare Etobicoke | 1988 |
| | Quebec | Montreal | Project Coexistence |
| | Montreal | Centre for Reference and Assistance on Cohabitation | 1987 |
| | Jonquiere | Habitation Partagé de Saguenay | 1987 |
| | Gatineau | Habitation Partagé de L'Outavais Urbain | 1988 |
| Nova Scotia | Dartmouth | Dartmouth Homesharing | 1983 |

B. Ceased Operation by May, 1988

| PROVINCE | CITY | AGENCY NAME | YEAR ESTABLISHED | Year Ops. Ceased |
|----------|-----------------|------------------------------|------------------|------------------|
| B.C. | White Rock | Homesharers of White Rock | 1982 | 1986 |
| Manitoba | Winnipeg | Age and Opportunity Agency | 1980 | 1983 |
| Ontario | Brockville | Home Share Program | 1986 | 1988 |
| Quebec | Montreal | Double Occupancy | 1984 | 1986 |
| | Montreal | Homeshare - Logement Partagé | 1987 | 1988 |
| | Riviere du Loup | L'Habitat Partagé | 1987 | 1988 |

- Brentford ✓
- Hamilton ✓
- North York ✓
- Windsor ✓
- Sudbury ✓
- Ottawa ✓
- City of Toronto ✓

APPENDIX II

HOME INSPECTION CRITERIA USED BY EXISTING AGENCIES

In inspecting a potential provider's home, criteria used by the different agencies included:

- cleanliness (11)*
- general livability, including quality of home, state of repairs (8)
- size/comfort/privacy of sharer's room (8)
- accessibility/number of stairs (3)
- safety (3)
- amount of storage space (2)
- accessibility to public transportation (2)
- area of city (2)
- adequate heating (1)
- quiet (1)
- number of people in home (1)
- availability of parking (1)
- backyard space (1)

* Number in brackets indicates number of agencies mentioning the item