



Board of Supervisors Memorandum

June 22, 2021

Home Sharing Pilot Program

Introduction

On May 18, 2021 the Board of Supervisors discussed a request from Supervisor Matt Heinz regarding the potential funding of a Home Sharing pilot program under the umbrella of Pima Council on Aging (PCOA) and directed staff to work with PCOA and return to the Board on June 22 with additional details on the program and Pima County's possible role in funding of the effort.

Chief Deputy County Administrator Jan Leshar met with staff from Supervisor Heinz Office and PCOA to develop a report that is provided below for consideration by the Board of Supervisors on June 22, 2021.

Discussion

A 2018 *Report on the State of Housing for Older Adults in Tucson, Arizona* revealed that "there is insufficient affordable, subsidized housing stock" in Tucson, Arizona to provide for older adults in our community. This fact provided the impetus, in large part, for PCOA to commission a Feasibility Study for the Home Sharing Approach to Affordable Housing for Older Adults in Pima County, Arizona, which was conducted in late 2020 and finalized in January 2021 (Attachment A).

The concept of Home Sharing allows a living arrangement to be developed between two individuals - a home provider and a home seeker - which is mutually beneficial to both parties. Through a Home Sharing agreement, home providers agree to provide space in their home to a home seeker in exchange for an agreed upon monthly rent or an exchange of services to be provided on a regular basis by the home seeker that will benefit the home provider.

Of the 78.2 percent of adults over the age of 60 in Pima County who own homes, many of individuals live alone. For many of the older adults that live alone, social isolation and loneliness are concerns. Home Sharing is a potential solution to this problem. Social isolation and loneliness are detrimental to the health and well-being of older adults. According to a study conducted by Brigham Young University, social isolation can be more detrimental than smoking or obesity for people over the age of 65. Shared housing would ensure companionship in retirement.

For some older adults living alone, physical and cognitive decline can play a significant role in completing activities of daily living, like light housekeeping, landscaping, or meal preparation. By entering into a Home Sharing agreement for space in exchange for services, the older adult can receive assistance with these activities without the need for more formal supportive services, which can be costly. For comparable service, the Arizona Health Care Cost Containment System (AHCCCS), Arizona Long-Term Care System (ALTCS) allows a per hour rate of \$26.40 for providers of these services.

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For the more than 3,000 older adults on waiting lists for subsidized housing, Home Sharing aims to increase the availability of low-income alternatives. These agreements are mechanisms by which the home seeker is afforded housing in the residence of the home provider in exchange for reduced monthly rents or services to be completed in and around the home.

Program Description

The first three months of the Home Sharing program will be focused on engaging in deeper research into other Home Sharing programs throughout the country to ensure that PCOA's Home Sharing program is in line with best practices. The feasibility study conducted in conjunction with Poster, Mirto, McDonald and Chess & Associates, outlines five programs that have been successful throughout the Country. PCOA's Director of Community Initiatives will conduct extensive research into these programs as well as understand other programs listed on the national Home Sharing registry. During this time, the Director of Community Initiatives will also develop the job description, post, advertise, and hire a program coordinator.

As identified in the feasibility study presented to the Board of Supervisors of May 18, 2021, successful Home Sharing programs use matching software coupled with a staff member trained to help match people. To meet this demand, while researching program models, the Director of Community Initiatives will also research developing or purchasing a matching software to begin entering information of newly recruited home providers and home seekers. Simultaneously, PCOA's Philanthropy and Communications Department will develop a comprehensive marketing plan and collateral material for distribution via social media, through earned and paid media, and at community collaborative events. PCOA will also collaborate with the Tucson Home Sharing on marketing and recruitment.

Once a Program Coordinator is hired that individual will work with the Director of Community Initiatives to continue to build infrastructure for the program and to attend trainings in mediation and conflict management. During this on-boarding period, PCOA staff will develop service materials and tools, like a template contract.

PCOA anticipates launching this program in early 2022 to begin to accept home seekers and home providers.

Staffing

The Vice President of Programs & Services: Lisa Reams, MS, is the Vice President of Programs & Services for PCOA and has been working in human service organizations in Tucson for over 30 years. As such, she oversees a multitude of direct service programs including: PCOA's Helpline, Case Management, Family Caregiver Support Services, Rights & Benefits, Medicare Counseling, Neighbors Care Alliance, Volunteer Initiatives, Senior Companion Programs, and End of Life Care Services. She will provide executive level support and guidance for the Home Sharing program.

Director of Community Initiatives: The Director of Community Initiatives is a proposed position to be partially funded under this funding opportunity and is a new position to PCOA. The Director will provide on-going support and leadership for the program, as well as initial programmatic development. This position provides day-to-day oversight and staff management of the Home Sharing program.

Program Coordinator: This is a proposed position to be fully funded under this funding opportunity. The Coordinator would be responsible for the day-to-day execution of programmatic tasks and direct client services. The Coordinator would be responsible for client engagement, assessments of both the home seeker and the home provider, and on-going interaction between successful matches. The Coordinator would report directly to the Director of Community Initiatives.

Administrative Support: 20 percent of an administrative assistant to assist with paperwork and programmatic tasks as needed. This administrative assistant would directly report to the Director of Community Initiatives and would be responsible for administrative support for other PCOA programs.

Communications Staff: Because this project would require significant communications to ensure recruitment of home seekers and home providers, PCOA requests 20 percent of one FTE for the staff work of the Philanthropy and Communications Department. This department consists of a Vice President of Philanthropy and Communications, a Director of Public Policy & Special Projects, a Director of Development, a Director of PR & Marketing, a Digital Project Manager, a Communications Specialist, and an LGBTQ+ Community Liaison. Collectively they will work to promote the program through earned and paid media, on social media, through community collaboration and partnerships, and in their newspaper, *Never Too Late*.

Sustainability Plan

PCOA has one year of committed funding from the City of Tucson for \$50,000 awarded through their P-CHIP grants process. These are two-year grant cycles and PCOA anticipated receiving a second year of funding from P-CHIP. In addition, PCOA will take the opportunity to develop the pilot program with this seed funding with the intent of applying through the Pima County Outside Agency application process.

As mentioned above, PCOA has a robust Philanthropy and Communications team, led by Lana Baldwin, CFRE. As a Certified Fund Raising Executive, Lana and her team will work with PCOA's various funding partners and private donors to continue raising funds for the program. In order to do this, seed funding from Pima County is needed to prove programmatic success.

Budget and Funding

Budget Line Item	Total
Salaries	
Vice President of Programs & Services (.1 FTE)	\$8,625
Director of Community Initiatives (.5 FTE)	\$30,956
Program Coordinator (1 FTE)	\$50,936
Administrative Assistant (.2 FTE)	\$6,568
Communications Staff (.2 FTE)	\$11,700
Employee Related Expenses	
Employee Related Expenses	\$32,635
Program Expenses	
Equipment	\$5,000
Client Matching Database	\$10,000
Travel	\$1,000
Printing	\$5,000
Marketing	\$10,000
Materials & Supplies	\$1,000
Staff Training	\$1,000
Staff Expense	\$1,000
Program Operations Costs (10%)	\$17,542
Indirect (14%)	\$27,014
Total Programmatic Cost	\$219,976

Conclusion

In reviewing the budget and funding request, it appears the County is simply being asked for the difference in the program cost estimated by the PCOA and the funding being provided by the City of Tucson. This is not an ideal model to generate community consensus on new programs. Ideally, I would also like to have seen financial participation from the private sector, primarily from organized and funded retirement communities throughout Pima County and potentially other jurisdictions providing some funding to such a communitywide effort.

I also understand that embedded in the cost from PCOA are indirect expenses. There are a number of funding options the Board could consider. The first would be simply to match the funding that has been provided by the City of Tucson. Another option would be to provide the entire difference as requested, \$170,000. A third option would be to provide approximate \$140,000, which is near the actual direct cost of PCOA with the difference in funding being made up by private sector contributions or participation.

I believe too often the County has been placed in the position of being the funder of last resort when communitywide efforts should be financially participated in by the entire

The Honorable Chair and Members, Pima County Board of Supervisors

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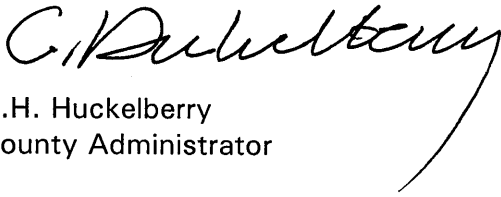
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community, which means all jurisdictions and private sector partners. As such, a program like this may have more communitywide attention and higher probability of long term success.

Recommendation

I recommend the Board of Supervisors financially participate in the Home Sharing program by providing funding to the Pima County on Aging for this purpose and request that quarterly evaluations be provided as to the progress of implementing the program based on their description of implementation. Regarding the amount of funding, I believe the Board of Supervisors could choose any number of options listed in the conclusion of this memorandum.

Sincerely,

A handwritten signature in black ink, appearing to read "C.H. Huckelberry", with a long, sweeping underline that extends to the right.

C.H. Huckelberry
County Administrator

Attachment

CHH/anc – June 4, 2021

c: Jan Leshar, Chief Deputy County Administrator

ATTACHMENT A

01. 22. 2021

A Feasibility Study for the **Home Sharing**
Approach to Affordable Housing
for Older Adults in Pima County, Arizona

*Cultivating
a Culture
of Sharing*

ACKNOWLEDGEMENTS

Thank you to the following for their contributions to this study

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Funded by

City of Tucson

Industrial Development

Authority



Produced by

Chess & Associates

in Partnership with

Poster Mirto McDonald

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Prologue

The data accumulated in this report points towards *home sharing* as a viable option towards a solution to the shortage of affordable housing for **low-income older adult home seekers** in Pima County.

However, the social, emotional and financial benefits across a spectrum of income levels needs further investigation. Additionally, **more data regarding homeowners, such as foreclosure rates for older adults**, and available housing stock in Pima County will enhance the overall development of a home sharing program and impact its implementation in Pima County; all for the good.

Pima County has a robust network of social services agencies that center the needs of older adults, as well as public and private funding entities that have interest in innovative and cost-effective ways to address housing security in various forms.

Both the need and capacity to coordinate resources, and amplify the narrative of the benefits of home sharing for older adults are present in this community.

Snap-shot of living situations for adults 60+ in Pima County

39.8%

39.8% live alone.

78.2%

78.2% own the homes they live in. Of those homeowners, **22% pay more than 30%** of their income in mortgage, property taxes, insurance, and maintenance.


52.5%

52.5% pay more than 30% of their income on rent.

3,000

At any giving time, more than 3,000 older adults can be on subsidized housing waiting lists.

Introduction



Current COVID-19 eviction moratoriums and tenet protections have delayed an impending increase in the need for emergency shelter and long-term affordable housing throughout Pima County. The growing crisis is not new, and the pandemic only exacerbates the ongoing housing shortage -especially for older adults.

In 2018 Pima Council on Aging presented *A Report on the State of Housing for Older Adults in Tucson, Arizona* (funded by *The Tucson Housing Foundation*) [1]. This report revealed that “there is insufficient affordable, subsidized housing stock” in Tucson, Arizona. Current PCOA data confirms this in that calls to the agency referencing housing insecurity have nearly doubled from 688 in 2017, to 1,242 in 2020.

[*The Arizona Daily Star recently published an article*](#) detailing the plight of older adults facing evictions and struggling to find landlords that will accept Section 8 vouchers prior to COVID-19 [2].

When current protections are lifted, older adults with multiple vulnerabilities; fixed or inconsistent income, poor health, and unstable or unsustainable housing, will remain among the most impacted. Affordable housing advocates and community-based organizations will continue to search for high impact, low cost, long-term solutions that activate existing resources and support a healthy quality of life for Pima County’s older adults.

“Now that we are in a pandemic, I wonder how my friends that are living alone are making it.”

- Sharon Kha, Co-founder, Tucson Home Sharing, Home Provider

I. Current State

For those older adults with substantial incomes, and insurance policies that cover the majority of long-term care cost, housing options are widely available. Pima County has numerous older adult communities that cater to the housing and lifestyle needs of mid- to upper income older adults.

For instance, an 850 square-foot two-bedroom home in the active older adult community of The Highlands at Dove Mountain (located in the City of Marana in Pima County) posted for sale on the developers' website for \$250,000. Comparable postings for rentals on the same site ranged from \$1,800 to \$3,000 monthly. These rates represent more than 30 percent of the average income of Pima County's older adults on fixed incomes.

Older adults with some medical needs and choosing to age in place can expect an average cost of in-home health care averaging a rate of \$25.00 an hour. Full-time comprehensive in-home care can be as much as \$219,000 a year. Long-term residential care in an assisted living facility averages \$3,283 a month. Again, if one's monthly Social Security and supplemental insurance income is the only source of support, these resources are out of reach.

For older adults on fixed incomes, affordable housing options are drastically limited.

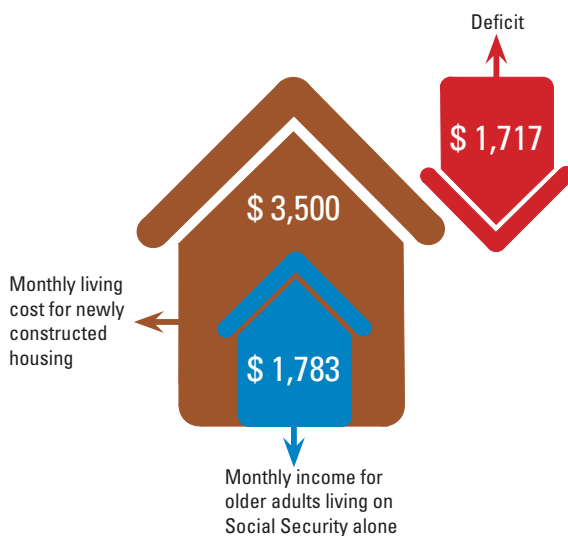
According to the *PCOA* housing report, 54 percent of the 48 housing communities surveyed accept HUD Section 8 vouchers, and 4 percent are subsidized through HUD 202 contracts [3]. However, Section 8 waiting list are long and landlords willing to accept the vouchers are decreasing. Although it is unclear how many older adults are on Section 8 waiting lists, *PCOA* housing data suggests there can upwards of 3,138 individuals wait-listed for subsidized housing in Pima County at any given time. **Although there are units, there are not enough.**

“Numbers of people ill-equipped to retire are going up, look for funding that funds out of the box ideas, not just to build or fix housing.”

- Alison Joucovsky, Founder/Executive Director, Sunshine Home Share, Denver, Colorado

II. Consideration

Building new housing units to meet the affordable housing need is an option. Corky Poster, architect and planner at *Poster Mirto McDonald*, estimates the cost of design and construction of one 850 square foot older adult age in place living unit to start at \$150,000; a \$170 per square foot building cost (not including cost of land), and it goes up from there. Land cost for R-2 zoning averages \$12,000 per unit in Pima County. The construction cost alone for one unit would be \$162,000. Estimated monthly rent associated with the construction costs would need to be a minimum of \$1,400 to pay back the development cost of project. Add an additional \$825 a month for renter's insurance, utilities, and food, transportation, prescriptions, and other living expenses=\$2,225 a month total. Full-time in-home health care averages another \$1,275 a month. All in, \$3,500. In order to meet the \$3,500 in total monthly expenditures there will be a \$1,717 deficit for the Pima County older adult living only on Social Security.



Source: US Census - Pima County

Forty-four percent of current low-income housing projects serving older adults were developed using *Low-Income Housing Tax Credit (LIHTC)* [4]. The LIHTC program may help construct new affordable housing, however, maintaining that affordability once the 15-year compliance period requiring the project maintain affordable rent rates is over is a challenge. Affordable housing projects are not often attractive to developers. **Over time, gentrification and artificially inflated land values may prove a stronger market incentive for developers and property owners, further limiting affordable housing options.**

Rea Vermeal, Rights and Benefits Coordinator for *Pima Council on Aging*, experiences firsthand the frustration of an inadequate supply of affordable housing for many low-income older adults. *“I deal a lot with landlord and tenant issues,”* she says. *“The rent goes up and the individual on fixed income can no longer afford to stay in their housing. We too often get phone calls where a person has 5-10 days before they will be evicted. There is just not enough subsidized or affordable housing to place those with the greatest need.”*

Then there is the supply side. Ms. Vermeal states, *“I talk to people, older adults, who own homes and can’t afford property tax or maintenance. They are looking for help too. We need a process by which two or more individuals can combine their resources to create secure and stable housing for each other.”*

“We have swung the pendulum too far to independence”

- Annamarie Pluhar M. Div. - Founder, Sharing Housing, Inc.

III. Cultivating a Culture of Sharing: A *Home Sharing* Solution

With the need for affordable housing in Pima County rapidly increasing, and long-term solutions slow to develop, creative housing options with low barriers to success are high in demand. **Pima County is not alone in grappling with the multitude of ways in which older adults confront the challenges and threats to maintaining secure housing and an independent lifestyle- regardless of income level.**

AARP's report, *Making Room: Housing for a Changing America*, states that “adults living alone account for nearly 30 percent of U.S. households...and the housing supply, no matter the locale, has been slow to meet the demands or respond to the needs of increasingly varied living arrangements.” [5]

Home Sharing is beginning to emerge as a relatively low-cost and immediate way to create sustainable long-term housing for older adults in communities across the United States. Forty-four programs are currently listed in the online *National Shared Housing Resource Center (NSHRC) Resource Directory* [6]. *NSHRC* is a network created to disseminate information and resources to organizations looking to develop shared housing programs. No programs are based in Arizona.

***Home Sharing* is a process by which a homeowner, or home provider, is matched with a home seeker, in exchange for affordable rent, help with chores, and companionship.** *Home Sharing* helps a home provider manage the cost of living and activate an underutilized bedroom and/or living space while providing a safe, secure, and affordable housing situation for a compatible home seeker.

Home Sharing programs are as operationally diverse as the communities they serve and the organizations and funding resources that support them. *NSHRC* has developed criteria to define best practices for *Home Sharing* programs:

- Programs are nonprofit or operating under a nonprofit agency or entity.
- Programs facilitate home sharing matches with qualified agency staff or volunteers trained to screen applicants.
- Programs offer an individualized and personal matching service between people who have an extra room in their home with those who are looking for housing.
- Programs have clear *Home Sharing* match agreements outlining the expectations between the parties.
- Programs provide follow-up services.
- Program goals are consistent with the goals of the *NSHRC* and fair housing laws.

IV. Program Models for Home Sharing

The following programs reviewed in this report are a convenience sample of national Home Sharing models in diverse communities across the United States. The most common thread is the commitment to serving the social and economic needs of older adults that wish to *age in place*. The sampling includes two models operating across geographic boundaries, one model that operates under a State designated Area Agency on Aging, and one model marketed as a for profit entity.

The NSHRC has identified two types of Home Sharing models:

Referral

Referral starts with for-profit entity screening and matching home provider and home seeker using proprietary software, then refers potential matches to the home provider. The home provider then leads the process from there. Little follow up and support services are offered from the referral entity.

Comprehensive

Comprehensive is typically managed by nonprofit organizations, and is highly structured with clear policies and procedures, fostering relationship building for success. Comprehensive programs require facilitated and vetted introductions based on carefully developed criteria for matching (usually developed with open-source software), written agreements, and on-going monitoring once a match is made.

*Beginning on the next page the following program profiles are a convenience sampling of 1 referral, and 4 comprehensive home sharing models. **These program attributes exemplify how these programs work in various markets though out the United States providing a roadmap to how these might be applied to Pima County.***

Examples of Referral and Comprehensive Models

Referral

Silvernest [7]

National online platform with offices in Denver, Colorado and St. Paul, Minnesota

Average Match Rate: Data unavailable

Silvernest was started in 2015 as a fee-based online matching service. Similar to a dating service, it uses algorithms to find potential matches and then pairs home providers with home seekers. The aim, as described from the company's website, is "for boomers and empty-nesters to enjoy the benefits of extra income or income savings, companionship, and the ability to stay in their home and age in place... it's a safe site that would help boomers with homes find compatible home-mates rather than placing ads on Craig's List or other venues."

Signing up is free. Both parties create profiles and are capable of browsing the database. It is only when the home provider decides to message someone in the database they are then prompted to pay. Membership for home providers is \$49.99 for 60 days of unlimited housemate matching, messaging, and access to background screening. Home seekers pay a onetime cost of \$29.99 to cover the cost of the background screening if that screening is requested by the homeowner.

According to online company marketing materials, the site currently has 50,000 users with the heaviest market usage in Colorado and Southern California. The service is open to people in every other part of the country, however, there may not be a home provider or seeker in the database to facilitate a match in a particular region of the United States.



Comprehensive

Ventura County Area Agency on Aging HomeShare [8]

Ventura, California

Average Match Rate: 25/yr

Ventura County Area Agency on Aging is the principal agency in the region charged with the responsibility to promote the development and implementation of a comprehensive coordinated system of care that enables those 60 years of age and older to live in a community-based setting. Similar to *Pima Council on Aging*, *Ventura County Area Agency on Aging*, is funded by the *Older Americans Act* to provide leadership and promote citizen involvement in the planning, development, and delivery of services to older adults. *VCAAA* provides four key services: transportation, financial assistance, information and referral, and housing services. *VCAAA HomeShare* is operated under the organization's housing services program.

HomeShare matches people looking for housing with people that have extra space and are looking for a roommate. The process includes an application, an interview, inspection of a home provider's property, background checks and follow-up. The program began in 2013 as a separate nonprofit called *HomeShare*. [The popularity of the program outgrew the capacity of the small nonprofit and merged the service with VCAAA in 2015.](#) The *VCAAA HomeShare* program is primarily funded through the *Ventura County Area Agency on Aging Foundation*, a 501 (c) 3 organized exclusively to support *VCAAA* programs and services.

See table in Section XIII for a comparison of demographics of PCOA and VCAAA clients served.



Affordable Living for the Aging Home Share Program [9]

Los Angeles, California

Match Rate: Average 30/yr

Affordable Living for the Aging is a nonprofit agency serving low-income and formerly homeless older adults in Los Angeles County, California through three programs:

Supportive Housing

The primary goal of ALA's social service program is to *"improve seniors' physical and mental health so they can maximize their independence."* ALA social workers provide onsite service to formerly homeless older adults at various shelters and public housing sites throughout the county.

Affordable Housing

ALA owns and operates older adult living residences throughout LA County located near vital services such as food stores, transportation, entertainment, senior centers, medical facilities, churches, temples, and pharmacies. They are dynamic communities where older people enjoy companionship and a greater sense of security.

Shared Housing

Established in 1978, ALA created the first shared housing program for older adults in Los Angeles. With a vision of *"offering seniors housing options based on reciprocity and socialization"*, the program matches together isolated and financially vulnerable older adults to share homes.

Individuals in the *Shared Housing* program undergo an interview and pre-screening process to assess their housing preferences, lifestyle preferences, character references, criminal history, and ability to pay the rent. If an individual is appropriate for the program, the ALA housing counselor refers them to compatible home providers.

The decision to enter into a match is up to the two participants. Staff constructs an agreement between the two parties to support the match in its early stages and create a document that can be used for addressing problems should issues arise. *ALA defines a successful match as a living arrangement that has been sustained for 2-3 years.* A successful match means *"ALA is maximizing utilization of the current housing supply and keeping seniors well-integrated in their neighborhoods."*

The *ALA Home Share* program is primarily staffed by a full-time Program Manager who works closely with the staff of other ALA programs.

Total budget for ALA is \$1.6M in expenses, \$2.5M in revenue. The organization did not provide a detail of income and expenses for the *Shared Housing* program.



Sunshine Home Share Colorado [10]

Denver, Colorado

Match Rate Average: 18/yr

Sunshine Home Share Colorado is a relatively new nonprofit home sharing program. Founded in 2015 by geriatric social worker, Alison Joucovsky, it emerged out of a convergence of a career spent working with *Naturally Occurring Retirement Communities*, and Denver's 2015 housing crisis.

SHSC serves the Denver County area, a population of older adults of 91,258, fifteen percent of the total population.

SHSC's program budget is \$ 261,000 and receives sixty-three percent of its funding from government grants, twenty-three percent from foundations, five percent from fundraising events, nine percent from individual contributions, and .4% from fees and earned income. Individuals are connected to the program service primarily through information and referral phone calls from area social service agencies, and internet inquiries.

According to Ms. Joucovsky, eighty-five percent of her budget is allocated to staffing: three full-time and one part-time social worker, and an executive director. Office space has been donated.

A volunteer has set up and manages the matching database-CiviCRM. *"It's a very specific open-source platform, anyone can use it for free",* she says. But adds, *"it will need to be maintained and someone should be paid to do that. The matching process is so important, and the database platform maintenance is key. It tracks all the matching steps- intake, phone calls, race and income. Data bases put information in, but they don't make matches. Criteria is put in, but it doesn't pull a list of potential matches, that requires human discretion. Nuanced information is what's important in making successful matches. The number one difficulty is making the match."*



Joucovsky explained the challenges of starting up a new program.

“Our first challenge was funding. Many funders said we were too new, too small, come back when you have data. When United Way came in it flipped it for us. We gained the attention of other funders and our local governments. We found the best luck in public funding through Denver County CDBG (Community Development Block Grant) funding that focused on affordable housing, keeping seniors housed.

We also had to learn who was a good candidate for the program. Homeless are not a good candidate- there is too much trauma and crisis, need too much support. People in transitional housing are good candidates. You need to be able to verify income and stability.

*There is a 2-4 year wait list for senior housing, so organizations would refer an individual on the wait list. **You need to build relationships to build a database of home providers**, that’s always hard. Once you put out that you are providing affordable housing they will come, **providers are harder to find**. Safety of home providers is always a concern; you must have screening and support services... **a contract is a must**.*

We also had to learn who was a good candidate for the program. Homeless are not a good candidate- there is too much trauma and crisis, need too much support. People in transitional housing are good candidates. You need to be able to verify income and stability.”

- See attachments B-D for Sunshine Home Share Colorado’s complete program guidelines, intake materials, contracts, and annual report.

Nesterly [11]

National online platform based in Boston, MA

Average Match Rate: 100/yr anticipated

Nesterly is a web-based company that finds, and vets potential home provider-home seeker matches. To make the home-sharing arrangement as safe as possible for both parties, *Nesterly* requires information about both homeowners and renters. This includes two personal references, criminal and sex-offender background checks, as well as an address history and a Social Security check.

The site's ongoing monthly fees are 2.5% for rent collection and help in arbitrating disputes. There is also an up-front matching fee of \$95 to \$195, depending on the length of the rental agreement. Hosts choose how to price their rooms and whether they'll give the renter a break if he or she agrees to pitch in with household chores. Most hosts stipulate what chores are needed and how much they'll cut the rent, if they're done consistently. *Nesterly* says the site typically sees a \$150 reduction in rent per month for approximately 2-3 hours of help per week (8-10 hours per month).

What makes *Nesterly* so interesting is that it has entered into a pilot program with the City of Boston to expand affordable housing options for older adults by establishing the *Intergenerational Homeshare* program. This program is a partnership between *Nesterly*, and the *City of Boston Age Strong Commission* and *The Mayor's Housing Innovation Lab*. [12]

This is the first public-private home sharing partnership program of its kind. Less than a year old, the program is being evaluated to determine level of success and scalability.



Home Sharing Programs Comparative Attributes

	ALA HS	Nesterly	SHSC	Silvernest	VCAAA HS
<i>Year Established</i>	1978	2017	2015	2015	2015
Comprehensive	•	•	•		•
Referral				•	
Public funding	•	•	•		•
Private/Foundation Funding	•	•	•		•
Fee-for-Service		•	•	•	
Umbrellaed Under Larger 501 (c) 3 Organization	•	•			•
Stand-alone Nonprofit			•		
Low Income Services	•	•	•		•
Online Application Process	•	•	•	•	•
Approx No. of Match a Year	30	100 <i>by 2020</i>	18	<i>Unavailable</i>	25

* Based on convenience data collection

V. Making Home Sharing Work in Pima County

In the online journal, *Innovation in Aging*, published by Oxford University Press, social science researchers investigated the experiences and outcomes of older adults in home sharing relationships and determined one common thread linking the satisfaction level of participants- *formal agency facilitation* [13]. When home seekers and home sharers were engaged with community-based organizations that provided guidance and support beginning with the application and matching process and continuing through placement and follow up, both parties reported having “*positive and successful home sharing experiences.*”

Nonprofit community-based organizations whose mission it is to serve the spectrum of needs of older adults can provide the necessary accountability, technical, and operational structure needed to assure a Home Sharing program is properly staffed, funded, and evaluated.

Pima Council on Aging, United Way of Tucson and Southern Arizona, and Our Family Services are older adult-serving agencies that have worked together for many years to conduct research, produce reports, create policy agendas, and deliver programs and services that support healthy aging in Pima County. Further discussion of these organizations appears later on in this report.

Additionally, the grass-roots nonprofit *Tucson Home Sharing*, has served as a strong advocate of home sharing in Pima County. The group meets regularly and has recently conducted an informal meeting, asking individuals to share their perceptions of, and experience with, home sharing. Many of the nearly 50 participants commented on the emotional benefits of home sharing, while fewer referred to the financial aspects of home sharing. Although limited in its scope, the conversation did provide some insight into the need for living arrangements that provide emotional support for older adults in Pima County.

VI. Elements for a Successful Home Sharing Program in Pima County

In addition to NSHRC criteria, the following elements have emerged as common to the success of Home Sharing programs across the United States. These elements currently exist in Pima County.

- A. Home Providers: Willing and Prepared to Open Their Homes
- B. Matching Software
- C. Accessibility to Technology
- D. Centralized Program Operations: Implementation and Evaluation of the Home Sharing Program
- E. Inclusion: Systematic Practice of Equity and Diversity

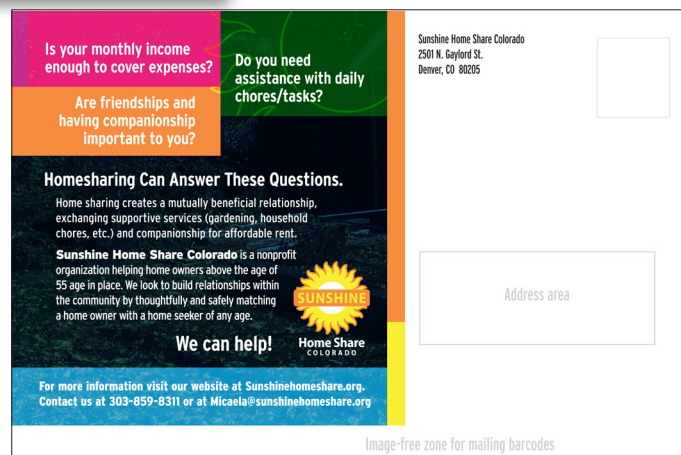
A. Home Providers: Willing and Prepared to Open Their Homes

The demand for the type of affordable housing home sharing provides is great, but where is the supply? The largest gap in determining the feasibility of a home sharing program in Pima County is the lack of available data that identifies potential home providers.

Sunshine Home Share Colorado faced a similar challenge when they launched their program in 2015. The organization created a marketing campaign to help educate the community on home sharing. This resulted in an increase in self-identified home providers.

Post cards were mailed to households in the service area, as well as placed in cafes, local stores, libraries and community centers.

Pima County has a robust set of networks in neighborhood associations, libraries, and community organizations that can provide access to information for potential home providers.



B. Matching Software

Most home sharing programs rely on computer software to initiate a matching process, and require both parties to complete detailed online surveys encoded with algorithms designed to sort, organize, and assign value to the various personality traits and lifestyle needs (conceptually similar to *Match.com*). Criteria for these algorithms are carefully constructed by home sharing program staff and are designed to reveal biases that may indicate the need for further conversation for clarification. **Matching software is the foundation of making a successful match.**

Given the accessibility, ease of use, and low cost of securing and managing an online matching platform, integrating an online matching system should not be a barrier to the development of a home sharing program in Pima County. For example, the *CiviCRM platform* offers some basic services for free, but the more nuanced and customizable features require a subscribing, starting at only \$50.00 a month [14].

“Typically, one of the first things people do when they want to address an issue, is to find a tool to use to address that issue.”

- Tom Kamber, Founder/Executive Director, Older Adults Technology Services (OATS)

C. Accessibility to Technology

It is important to keep in mind that many older adults are not integrated into online platforms. The City of Tucson’s AARP sponsored *Tucson Age Friendly 2019-2024 Action Plan* indicates that fifty-three percent of participants in the study were concerned about getting (online) information about services for older adults [15]. Low-income older adults living in communities with limited or no access to the internet in their homes (especially in rural communities) often rely on public access to computers through libraries and community centers. Online marketing and access to program applications are key elements to the success of home sharing. Online matching helps speed the matching process and creates a system of accountability. Alison Joucovsky, executive direct of *Sunshine Home Share Colorado*, reiterated the importance of online access. *“When we put our applications online our matching referrals rapidly increased.”*

Older adults experience limited access to technology for a variety of reason- fear of online predators, lack of experience and confidence with operating systems, cultural and language barriers, etc. **Multiple media and communication methods should be applied to marketing, outreach and engagement strategies.**

D. Centralized Program Operations

The following organizations represent a strong foundation for centralized program operations, outreach, marketing, and advocacy.

Tucson and Pima County have several key older adult serving organizations that currently collaborate and share resources: *Pima Council on Aging, United Way of Tucson and Southern Arizona, Tucson Home Sharing, and Our Family Services*. These organizations, with support from the *National Shared Housing Resource Center*, have the collective capacity to further cultivate community and civic partnerships, education and marketing opportunities, and long-term supportive services necessary for a home sharing program to thrive in Pima County [16].

Our Family Services

Our Family Services is a nonprofit organization serving Tucson and Southern Arizona's vulnerable youth, families and older adults. Their mission is eliminating homelessness and strengthening the community. *Our Family Services* partners with other service organization though out the region to create a network of support links individuals to resources, support social connectedness, provides stability in times of crisis, engages community in social issues, and supports policies that combat systemic inequities.

Home sharing aligns with the organizations mission. In 2013, *Our Family Services* began investigation into the feasibility of a home sharing program in Tucson and Southern Arizona. The results were inconclusive, **but the organization continues to have interest in activating appropriate resources to support a home sharing program.**

Pima Council on Aging

PCOA is the Area Agency on Aging, funded through the Older Americans Act, for Pima County, Arizona. As the Area Agency on Aging, PCOA is responsible for planning, service provision, and advocacy on behalf of older adults in Pima County.

PCOA staff, board and leadership represent the organization in various community and civic coalitions, collaborations, and partnerships that advocate for and promote healthy and independent lifestyles for Pima County's older adults. *PCOA's* depth and breadth of knowledge and expertise in housing for older adults, and an established operational infrastructure, makes the organization **a critical component to the development, implementation, and evaluation of an older adult centered shared housing program in Pima County.**

Tucson Home Sharing

Established in the winter of 2020, *Tucson Home Sharing* is a grass-roots organization established to advocate for, and educate about, home sharing as a deeply rewarding affordable housing option for older adults. They have engaged 50 followers through their Facebook page, and interacted with many more in community meetings and gatherings; with an objective to keep home sharing on the radar of older adult-serving organizations, civic leaders, and the community at large. *Tucson Home Sharing's* commitment to outreach and advocacy would **provide a platform for recruitment of home providers in Pima County.**

United Way of Tucson and Southern Arizona ELDER Alliance

United Way's ELDER Alliance is a collaboration of nonprofit organizations, businesses, government agencies, community partners, and individuals 50+ that work to design and support solutions that impact the quality of life for all residents of Pima County.

The ELDER Alliance oversees eight action teams who focus on responding to the evolving interest of older adults and carrying out activities in the communities.

Housing is one of the issues being addressed by an action team. Team members have participated in focus groups, research project, and advocacy efforts and have expressed a continued interest in supporting home sharing education and marketing activities as they develop.

National Shared Housing Resource Center

NSHRC is a network of non-profit home sharing programs across the United States. Their goals are to raise awareness of the benefits of home sharing, encourage best practices and cross learning among programs, and to foster the development of new home sharing programs. New home sharing programs, or ones that are emerging, can access resources to help strengthen the success of the program.

Membership is a one-time fee of \$100.00. This provides access to conferences, trainings, newsletters, resources guides, networking, and the ability to list a program that meets *NSHRC* criteria. **Membership in the *NSHRC* network would be essential in supporting the success of a home sharing program in Pima County.**

E. Inclusion: Systematic Practice of Equity and Diversity

Housing policies rooted in systemic racism and implicit and explicit bias have created inequitable financial and social outcomes for people of color and other marginalized communities for generations. Fair housing laws are only now beginning to alleviate the long-term effects of these policies. Comfort, security, dignity and a sense of belonging are not be considered privileges in ones living environment, but expectations to be nurtured as one ages. Chicago's *Center on Halsted Homesharing Program* is an example of how a marginalized community has used home sharing to meet the affordable housing needs of its older adults in a safe and affirming way.

Center on Halsted is the Midwest's most comprehensive community center dedicated to the health and well-being of the Lesbian, Gay, Bisexual, Transgender and Queer (LGBTQ) people of the Chicago area. In July of 2010, it launched the nation's first home sharing program designed to meet the unique needs of older adults [17].

Program Director, Britta Larson, says the program evolved out some very specific indicators:

- LGBTQ older adults are twice as likely to be single and three to four times more likely to be without children than their heterosexual counterparts. In addition, most senior living communities are not LGBTQ affirming and many LGBTQ older adults fear discrimination in this setting. The household assistance that renters can provide to LGBTQ older adults through this program can help them remain in their own home and age in place.
- After a lifetime of unequal treatment under the law, many LGBTQ older adults are experiencing financial hardships. The additional revenue that the Homesharing provider receives from the rent can be tremendously beneficial for seniors on a fixed income.
- Lastly, social isolation among LGBTQ older adults is common as their support systems dwindle as they age. The companionship they receive from their renter can reduce loneliness and isolation.

Similar to other home sharing programs presented in this report, the program has been designed to include multiple layers of safety precautions. All applicants complete a rigorous screening process which includes background and reference checks and personal interviews. In addition, *Center on Halsted* monitors each Home sharing match once they are living together through monthly check-ins. Program staff maintain regular contact with each match and provide additional support as needed.

Although the program has been designed around the needs of LGBTQ older adults, the program follows all fair housing laws and anyone over the age of 18 is welcome to apply as a home seeker. For home seekers, there is an additional income requirement to ensure that they are able to meet their monthly obligations to the home provider.

Center on Halsted staff and board leadership spent 6 months designing the program with particular emphasis on addressing legal and liability issues. Since its launch, the program has had an average 16 matches per year, involving 32 participants.

Following the *Center of Halsted's* lead, other cultural and ethnic affinity groups in Pima County may have similar needs. Community organizations, such as the *African American Retirees of Tucson*, can help inform and design culturally relevant aspects of a home sharing program in Pima County.

VII. Financial Implications for Home Sharing in Pima County

The cost of starting up a Home Sharing program is relatively low when compared to other options for older adults.

The following startup cost are estimates of staffing and program costs gleaned from Home Sharing programs across the United States, and adjusted to align with *GuideStar's 2020 National Compensation Report* for Pima County, Arizona [18].

Estimated costs for a Home Sharing Program in Pima County

Staff

Program Director	\$ 60,000.
Post-Match Support Services Coordinator	\$ 55,000.
Staff Support/Admin	\$ 45,000.

Program Services

Database Manager	\$ 30,000.
Marketing & Communications	\$ 45,000.
Fundraising	\$ 50,000.

Space Rental/Overhead

Office Space	\$ 14,400 (\$ 1,200/mo.)
Database	\$ 600. (\$ 50.00/mo.)
Equipment	\$ 10,000. (one time cost)
Supplies	\$ 5,000.

Total Expenses	\$315,000
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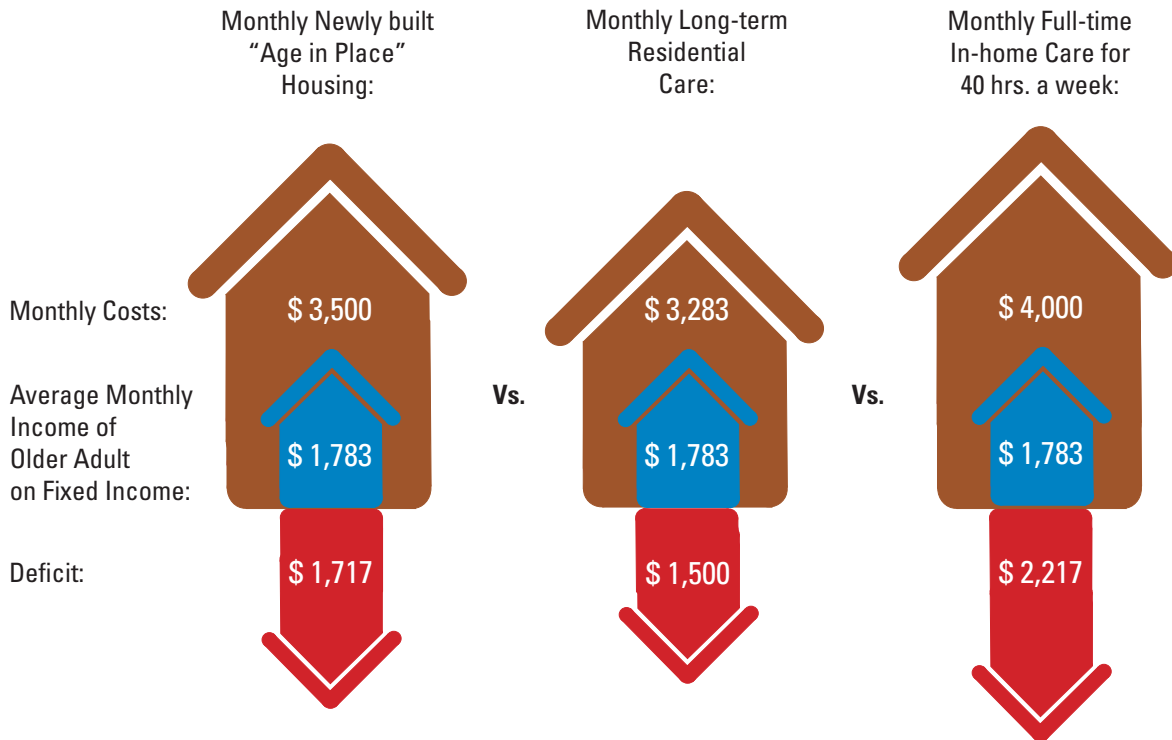
A \$315,000 investment in a home sharing program has a potential savings of upwards of \$1,500 monthly for an individual.

However, **as the program grows, more individuals will benefit.** On the next page additional questions have been identified that require further investigation.

Projected Return on Investment in a Home Sharing Program in Pima County

The real cost and benefits of a Home Sharing program are difficult to assess at this point because there is not enough data to formulate projections.

The individual cost of inaccessible affordable housing to older adults on fixed incomes:



The following questions are a guide to the next phase of research that will help build a case for the funding and support of a Home Sharing program:

- Will a Pima County Home Sharing Program require a fee to participate in the program?
Most programs do not charge a fee to home seekers. If there is a cost involved, it is absorbed by the home provider though a listing fee. One program listed in this report charges a \$20 listing fee.
- How much will the average home provider save by having 'help around the house'?
- How much will rental income contribute to home providers' monthly owner costs?
- What value amount can be placed on the non-tangible outcomes such as sense of safety, trust, and emotional wellbeing?

VIII. Funding Resources

Funding for affordable housing programs generally focus on fixed ideas about what affordable housing typically looks like; new construction projects, government assistance, Section 8 vouchers, first-time-home-owner assistance, Habitat for Humanity, etc. Affordable housing service organizations and advocates are charged not only to dissolve the barriers that make housing financially obtainable for low to median income earners, but also creating shelter and emergency housing for very low-income individuals and families. Innovative programs that use existing resource to address the need, like Home Sharing, are optimal solutions.

Funding for affordable housing projects and programs are largely facilitated through City and County Department(s) of Housing and Community Development. Foundations and private philanthropy are beginning to convene donors and partner with state and local government to address the need.

In 2020, The Community Foundation for Southern Arizona (CFSA) partnered with the Making Action Possible (MAP) dashboard [19] to glean housing data, and has decided to conduct further research of existing programs, gaps in funding, and what innovative programs may present as viable solutions in Southern Arizona. While not solely focused on the needs of older adults, this taskforce presents an opportunity for Home Sharing to enter into the conversation as a solution to the fundable housing needs in Pima County.

Additional local and national funding opportunities are listed on the next page.

Funding Resources *continued*

Additional local and national funding opportunities include:

Public Grants and Initiatives

Administration for Community Living

<https://acl.gov/>

Social Care Referrals Challenge

Grant funding to support innovative technology solutions to delivered in the home and in the community services that prevent falls, address food insecurity and transportation issues, manage chronic disease, support employment and economic independence, reduce social isolation, and address other non-medical risk factors have been shown to improve health outcomes and reduce the cost of care.

Department of Housing and Urban Development

<https://www.hudexchange.info/>

Continuum of Care Program

Provides funding to states, localities, and nonprofit organizations to provide permanent housing, transitional housing, and in some cases, homelessness prevention.

Pima County Community Action Agency

<https://webcms.pima.gov/cms/one.aspx?portalId=169&pageId=2>

Funding to alleviate the causes and conditions of poverty

Health Plans, Hospital Foundations, or Hospital Community Benefit Dollars- funding for social determinants of health; reducing readmissions or other value-based payment models

Tucson Medical Center Foundation

Community Benefit

<https://www.tmc.org/community/community-benefit>

Banner Health Foundation

<https://www.bannerhealthfoundation.org/>

Private Philanthropy-Donor Advised Funds

Arizona Community Foundation

<https://www.azfoundation.org/>

Community Foundation For Tucson and Southern Arizona

<https://cfsaz.org/>

IX. Timeline

The following is a suggested 3-year timeframe for developing and implementing a Home Sharing Program in Pima County. This is based on feedback from NHSRC and representatives from the Home Sharing programs in this report that found three years is the average time it takes to plan and launch a well-organized and planned program.

Year I

Phase I

- Strategic Mapping and Market Research
 - Build Marketing Campaign
 - Identify lead agency
 - Build Community Alliances
 - Resource Development (fundraising, grant writing)

Phase II

- Evaluation and Adjustment
- Program Structure
- Approval and Evaluation

Year II

Phase I

- Program Design Completion
 - Match Criteria and Data Base
 - Contracts
 - Job Descriptions
 - Roles and Responsibilities
 - Recruit and Train Staff

Phase II

- Formally launch ongoing marketing campaign targeted toward home providers
- Evaluation

Year III

Phase I

- Formally Launch Program
- Evaluation

X. Conclusion and Recommendations

Like the majority of our nation's communities, there is an extreme and immediate need for affordable housing in Pima County- particularly for older adults. Home sharing is a relatively low-cost, high impact option for providing long-term safe and stable housing for older adults. Given the collective capacity of older adult- serving organizations in Pima County to assist in the cultivation of such a program, **the development of a comprehensive home sharing program should be pursued.**

The program development and delivery network needed to sustain a home sharing program in Pima County is already in place. However, data on homes to share and the willingness and readiness of potential home providers is lacking and requires deeper inquiry.

The following recommendations are presented to create an environment where home sharing can thrive in Pima County.

Discover

- *Collect more data*

- What is the available housing stock in Pima County?
- In what neighborhoods and communities do potential home providers reside?
- In what neighborhoods and communities do home seekers want to reside?
- Identify target audience who would best be served by this program?
 - Who are ideal home providers?
 - Who are ideal home seekers?
- Establish an iterative and ongoing evaluation process that tracks levels of community engagement and prioritizes equity and diversity in program design and facilitation; determine who is being left out of the planning and implementation process and adjust accordingly.

Connect

- *Invite Participation*

- Develop an asset mapping and planning process that cast a wide net across multiple business, government, community and nonprofit sectors.
- Include a wide variety of beliefs and perspectives in the planning process.

Articulate

- *Tell the story*

- Begin educating individuals, community and civic leaders, and stakeholders about home sharing well before the program launches.
- Implement an integrated marketing and communications plan that is multi-lingual, culturally relevant, and reflects the diversity of the community. Ensures a variety of individuals that can see themselves reflected in all aspects of the program.

Below is a concept advertisement suggesting what a Pima County Home Sharing Program recruitment campaign aimed at home providers can look like.



"If we simply ask ourselves different questions about how we want to live, we might discover better answers."

- Making Room: Housing for a Changing America, 2019 AARP AARP.org

XI. Home Sharing Concept in Pima County: A Case Study

National home sharing advocate and author, Annamarie Pluhar writes extensively about the sense of community and connectedness nurtured in a successful home sharing arrangement [20]. In an interview for this report, she quoted a statistic also present on her website, *"Twenty-seven percent of housing in this country are single occupancy"*, she continued *"I believe is leading to an epidemic of loneliness in our society. Sharing housing can make a difference."*

Home sharing can be experienced as the most emotionally satisfying affordable housing option for older adult home providers wishing to stay in a community setting as they age, and home seekers willing to shoulder some of the responsibility of home ownership. Such is the case for [*Deborah Knox and Sharon Kha, co-founders of Tucson Home Sharing*](#) [21], an advocacy group championing the home sharing movement in Tucson and Pima County.

Deborah and Sharon have been in a home sharing relationship since 2016. They were introduced to one another through a mutual friend who understood their needs (and personalities); both were well over 60 and seriously looking at what type of lifestyle they wanted to enjoy as they aged. Sharon didn't want to be a burden to her family. Deb didn't want to be burdened by debt, a mortgage and Homeowner Association fees. Deb was trying to sell her home. Sharon was trying to stay in hers.

As a homeowner with 'too much house', Sharon was unsure of her options. *"At the age of 72, you are fearful of what will happen to you both physically and emotionally."* After viewing a video featuring a home sharing relationship, Sharon was convinced, *"that was the kind of relationship I wanted at the end of my life."*

As a home seeker, Deb was a bit unsure of what she would have to give up, not necessarily in regard to material possessions, but in terms of attitudes and behaviors that have supported her independent lifestyle up to this point. *"I had a great deal of pride in 'doing it myself.' But low and behold, I figured it out that I didn't have to do it alone!"*

Deb and Sharon's informally arranged home sharing relationship has had a profound effect on both their lives. Neither knew it at the time, but what they were searching for more than a mutually beneficial housing arrangement, was intimacy- *"the unexpected opportunity to be on the inside of another person's life,"* says Sharon.

A home sharing relationship is not without its challenges. Sharon refers to the 'deal maker' in her decision to enter in the relationship with Deb as... *"the fact that even though we didn't know each other before, we each knew the person that introduced us, and I trusted her. That is the thing that I return to in times of doubt- trust in the process."*

XII. Epilogue

As the variety of home sharing programs, and the diversity of communities in which they operate demonstrate, there is not one singular model that guarantees a successful home sharing relationship outcome. The success of a home sharing program depends the ability to tell the many stories of home sharing's benefits: affordable housing, companionship, connection to the health and wellness ecosystem that supports the ability of older to age in place; and the quality of the match between home seeker and home provider.

Upfront investments on marketing, matching software, and program personnel skilled at developing and maintaining relationships will provide the foundation for a successful home sharing program in Pima County.

XIII. Demographics of Home Sharing Program Locations

Demographics 60+	Pima County	Ventura County	Nesterly	LA County	Boston	Denver
60+ Population Total	278,088	1,990,440	75,058,081	2,004,889	116,981	91,258
Male	45.3%	45.5%	45.4%	44.7%	43.6%	45.1%
Female	54.7%	54.5%	54.6%	55.3%	56.4%	54.9%
Non White	12.3%	14.8%	18.8%	43.3%	46.0%	20.4%
(\$12,760) Low Income	9.1%	7.1%	9.7%	13.2%	20.5%	13.4%
White	87.7%	85.2%	81.2%	56.7%	54.0%	80.3%
Black	2.5%	1.8%	10.0%	9.1%	28.9%	10.3%
LatinX	19.5%	23.2%	9.2%	32.1%	12.8%	19.7%
American Indian / Alaska Native	2.2%	0.2%	0.6%	0.8%	0.0%	1.0%
Asian	2.3%	8.3%	4.7%	19.2%	10.2%	3.9%
In the Labor Force	26.2%	32.4%	29.7%	31.5%	34.7%	31.6%
Average Earnings/Yr	\$59,653	\$116,676	\$76,174	\$92,385	\$110,123	\$66,347
Have Retirement Income	56.1%	53.3%	52.0%	37.7%	38.4%	46.5%
Average Retirement Income	\$32,056 yr	\$36,907	\$30,425	\$37,975	\$38,981	\$23,628
Have Social Security Income	79%	72.5%	74.4%	65.5%	62.1%	68.1%
Average Social Security Income/Yr.	\$21,457 yr	\$20,872	\$20,899	\$19,169	\$17,616	\$15,197
Live Alone	39.2%	40.2%	39.5%	35.8%	49.3%	52.9%
Own Home They Live In	78.2%	78.6%	77.5%	63.2%	50.2%	67.0%
Pay More Than 30% on Owner Cost	22%	30.5%	23.3%	33.1	29.8%	31.4%
Average Owner Cost -Mortgage/Yr	\$15,252	\$31,668	\$17,424	\$27,024	\$26,832	\$16,824
Rent Living	21.8%	21.4%	22.5%	36.8%	49.8%	33.0%
Pay More Than 30% on Rent	52.5%	66.4%	52.2%	60.9%	60.3%	59.9%
Average Rent/Yr	\$10,128	\$22,308	\$10,764	\$15,204	\$9,348	\$7,812

* 2019 US Census Data [22]

XIV. Resources

COMMUNITY PARTNERSHIPS AND COLLABORATIONS

AARP Arizona

<https://states.aarp.org/arizona/>

Arizona State University Center for Innovation in Healthy and Resilient Aging

<https://nursingandhealth.asu.edu/research/centers/aging>

Arizona State University- Morrison Institute for Public Policy/Watts College of Public Service and Community Solutions

<https://publicservice.asu.edu/>

City of Tucson Housing and Community Development

<https://www.tucsonaz.gov/housing-and-community-developmen>

City of Tucson Industrial Development Authority

<https://www.tucsonIDA.org>

City of Tucson Neighborhood Associations

<https://www.tucsonaz.gov/pdsd/neighborhood-association-registration>

<https://www.tucsonaz.gov/apps/associations-and-neighborhood-maps/>

Our Family Services

<https://www.ourfamilyservices.org>

Pima Council on Aging

<https://www.pcoa.org/>

Pima County Community Land Trust

<https://www.pcclt.org/>

Southern Arizona Home Builders Association

<https://www.sahba.org/history/staff/>

Tucson Pima Collaboration to End Homelessness

<https://tpch.net/>

United Way of Tucson and Southern Arizona ELDER Alliance Housing Action Team

<https://www.unitedwaytucson.org/elder>

University of Arizona Center on Aging

<https://aging.arizona.edu/>

Urban Land Institute- Arizona

<https://arizona.uli.org/>

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<http://www.alaseniorliving.org/faq>

[10] **Sunshine Home Share Colorado**

<https://sunshinehomeshare.org/>

[11] **Intergenerational Homeshare Program**

<https://www.nesterly.io/>

[12] **Nesterly**

<https://www.boston.gov/departments/new-urban-mechanics/housing-innovation-lab/intergenerational-homeshare-pilot>

City of Boston Strong Commission

<https://www.boston.gov/departments/age-strong-commission>

City of Boston Mayor's Innovation Lab

<https://www.boston.gov/departments/new-urban-mechanics/housing-innovation-lab>

V. WHAT IS NEEDED FOR HOME SHARING TO WORK IN PIMA COUNTY?

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VI. KEYS TO A SUCCESSFUL HOME SHARING PROGRAM IN PIMA COUNTY

B. Matching Software

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<https://civicrm.org/features/case-management>

C. Accessibility to Technology

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<https://www.centeronhalsted.org/senior.html>

REFERENCES continued

VII. FINANCIAL IMPLICATIONS FOR HOME SHARING IN PIMA COUNTY

[18] **Guidestar**

<https://learn.guidestar.org/>

VIII. FUNDING RESOURCES

[19] **Making Action Possible**

<https://mapazdashboard.arizona.edu/>

XI. CASE STUDY: The Informal Home Sharing Concept in Pima County

[20] **Annamarie Pluhar**

<https://www.sharinghousing.com/about-annamarie-pluhar-founder-author/>

[21] **Deb Knox and Sharon Kha**

<https://www.youtube.com/watch?v=gK7Mq8c95gU&feature=youtu.be>

XIII. DEMOGRAPHICS OF HOME SHARING LOCATIONS

[22] **US Census Data**

Pima US Census

<https://data.census.gov/cedsci/table?q=Population%2060%20years%20and%20older%20Pima%20County,%20Arizona&tid=ACST1Y2019.S0102&hidePreview=false>

Ventura County US Census

<https://data.census.gov/cedsci/table?q=Population%2060%20years%20and%20older%20Ventura%20County,%20California&tid=ACSDP1Y2010.DP05&hidePreview=false>

Nesterly/National US Census

<https://data.census.gov/cedsci/table?q=Population%2060%20years%20and%20older%20United%20States&tid=ACST1Y2019.S0102&hidePreview=false>

Boston, Massachusetts US Census

<https://data.census.gov/cedsci/table?q=Population%2060%20years%20and%20older%20Boston,%20Mass&tid=ACST1Y2019.S0102&hidePreview=false>

Los Angeles County Census

<https://data.census.gov/cedsci/table?q=Population%2060%20years%20and%20older%20Los%20Angeles%20County,%20California&tid=ACST1Y2019.S0102&hidePreview=false>

Denver County US County Census

<https://data.census.gov/cedsci/table?q=Population%2060%20years%20and%20older%20Denver%20County,%20Colorado&tid=ACST1Y2010.S0102&hidePreview=false>

Additional Programs and Information

Older Adults Technology Services

Brooklyn, New York

<https://oats.org/>

Solutions Summit for the Housing Crisis

<https://improvepophealth.org/solution-summit>

XVI. Appendix

ATTACHMENTS



Attachment A - Ventura County Home Share Program

 The image shows a form titled "HOME SEEKER AND PROVIDER INTAKE". It includes fields for Name, Address, and Phone Number. Below these are "Home Seeker/Provider Questions" numbered 1 through 10, each with a corresponding line for an answer. The questions cover topics like current living situation, reasons for seeking a home share, and availability for sharing.

Attachment B - Sunshine Home Share Colorado Home Seeker/Provider Intake Guide



Attachment C - Sunshine Home Share Colorado Home Sharing Guide



Attachment D - Sunshine Home Share Matching Process



2016

Ventura County HomeShare Program



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WELCOME!

Thank you for your interest in Ventura County HomeShare. This booklet provides a basic overview of the HomeShare program with the aim of explaining what homesharing is and providing you with information and tools that will help you through the process of finding a housing situation to fulfill your needs.

HOMESHARE BASICS

WHAT IS HOMESHARE

Homesharing is an alternative way of meeting housing needs that benefits renters and homeowners alike. Some reasons that people share include: companionship, help with chores and light housekeeping, or financial assistance with taxes, utilities and maintenance. Ventura County HomeShare maintains lists of prescreened participants and identifies potential matches based on rent, desired location, and other criteria.

Home Providers may be living in a house too large due to life changes (empty nest or loss of a spouse), or they may be a one-parent family finding it difficult to cope with maintaining a household alone. Home Seekers may be seniors, college students, newly divorced persons, professionals recently moved to the area or travelling, or anyone in need of lower cost housing who enjoys living with others.

Simply put, HomeSharing is an arrangement where two or more unrelated people share a dwelling, each having her or his private space and sharing certain common areas. Homesharer's may arrange a regular rental payment, or exchange services to offset a portion or all of the rent. No two HomeSharing situations are alike; each is tailored to the needs and desire of the individual people involved.

DIFFERENT TYPES OF HOMESHARE

In a *rental* arrangement, the home provider will rent out a spare bedroom for extra income.

In a *service exchange* arrangement, the home provider may offer a rent-free room in exchange for services such as transportation, cooking, housekeeping, laundry, running errands, yard work, handyperson, companionship, or pet care.

In a *mixed* arrangement, the home provider will offer a reduced rent to be offset by services.

Ventura County HomeShare is not a Home Care Agency and does not provide a private duty registry of licensed caregivers. HomeShare is not meant to be a home health service, and home seekers are not expected to provide personal care services which include:

- Bathing/assistance with bathing
- Dressing
- Bathroom assistance
- Turning or lifting
- Service which brings the housemate in contact with bodily fluids
- Injections or administering medications

THE HOMESHARE PROCESS

HOMESHARE NON-LIABILITY STATEMENT

The staff of Ventura County HomeShare acts only as a facilitator providing the opportunity for parties involved to come together and work out their own housing arrangements. HomeShare makes no promises, guarantees, warranties or claims regarding seekers or providers of housing. Background checks are limited in nature and only provide information on federal arrests or criminal records within the last five to seven years. HomeShare does not perform credit checks, verify income or ability to pay and does not verify physical and mental health status. It is the responsibility of the participants to determine whether referred individuals are found to be compatible. All final decisions regarding HomeSharing rest with the seekers and providers of housing.

The final decision on any living arrangement made is voluntary and the decision will be made solely by the parties in the living arrangement. Ventura County HomeShare staff or volunteers will not be held legally responsible for the living arrangements, nor will they assume any liability for claims, damages, or other consequences which may arise from a HomeSharing arrangement.

Further, HomeShare recommends that any housing arrangements should be set forth in a written agreement. Samples and templates are available for participant use as models.

While seekers and providers may personally decide whom they wish to share housing with, based on their own preferences, HomeShare will not make any HomeShare decision/referral based on an individual's race, color, religion, national origin, ancestry, age, gender identity, marital status, sexual preference or handicap status.

HOMESHARE PROCESS OUTLINE

1. Program Orientation
 - a. Read this information packet completely
 - b. Review the Program Limitations section
2. Complete and submit application materials
 - a. Application
 - b. Release of liability form
 - c. Background check release form
 - d. Program Exit Guidelines form
3. Upon receipt of a completed application package
 - a. Reference checks are performed
 - b. We will check our list of current situations to see if anyone registered with us meets your needs
 - c. Home visit and inspection (home providers only)
4. Upon identification of a potential match
 - a. Background check
 - b. A HomeShare staff member will contact you with basic information about the potential match. If you wish to proceed, the Home Seeker's contact information will be forwarded to the Home Provider. It is important to remember that who you choose to contact is your decision.

- c. At this stage, it is typical for the Home Provider to phone the HomeSeeker and the parties conduct a phone interview. HomeShare will provide you with packets that include suggested questions to ask during your initial phone call. This should help you structure your interview in a way that provides you with exploratory questions that will help you evaluate your compatibility with one another.
 - d. The Provider and Seeker should follow up with HomeShare with feedback about the phone interview and if you would like to schedule a face-to-face introduction.
- 5. Face –to-face introduction
 - a. If both parties want to meet one another, a face-to-face introduction is scheduled.
 - b. HomeShare will provide you with a face-to-face interview guide that will assist you in structuring your conversation and assist you in obtaining important information.
 - c. A HomeShare staff member can be present to help you ask questions and get to know one another, unless you decide this is unnecessary.
- 6. HomeShare Agreement
 - a. Once a HomeShare match is made, we suggest that the participants document their agreement
 - b. HomeShare can provide templates that participants can use for creating an agreement personalized to their situation. Items covered may include: rent, service, meals, phone, quiet hours, parking and any other items both parties want to add.
- 7. Ongoing Support
 - a. Once you are matched, you are still welcome to call HomeShare, should any problems arise.
 - b. HomeShare staff will call you from time to time to see how things are going.

ENDING YOUR HOMESHARE ARRANGEMENT

While many HomeShare arrangements last years, others end sooner. Most relationships end because of the changing needs of at least one of the participants. A seeker may find a job elsewhere, or save enough money to buy a home. A provider might decide that the living situation is not meeting their needs and would like to live alone.

A HomeShare agreement can help make the transition easier. If you decide to end the match for any reason, follow the notice period decided upon and outlined in the HomeShare agreement. Keep open communication and try to negotiate an agreeable exit strategy. The ‘notice’ period can be less awkward if you stay away from personal attacks or delicate issues.

To prevent misunderstandings, it is best to also give your notice in writing. On the rare occurrence that a person fails to honor your request to leave, you should seek advice from a lawyer on the legal steps to end your HomeSharing situation.

IS HOMESHARE THE RIGHT PROGRAM FOR ME?

PROGRAM LIMITATIONS

- Individuals accepted as seekers need to have an income level sufficient to pay rent or have time and willingness to provide some services, or both. For a no-rent situation, a reasonable service exchange would be a maximum of 10 to 12 hours of work, per week.
- Individuals with current, untreated substance abuse problems cannot be served by HomeShare. Persons in recovery must have two years abstinence that can be substantiated with documentation.

- Successful homesharers must have a degree of emotional stability, which allows them to be interested in and involved in the welfare of others. This program is not appropriate for someone who may have problems that would create additional stress in a home living arrangement.
- Participants should be able to advocate for one's self and assume full responsibility for every step of the HomeShare application process.
- HomeShare does not provide home health care. If an applicant needs a great deal of personal care or cannot be left unattended this program is not appropriate. Homesharers can provide companionship and household help, but it should be expected that seekers will have activities of their own, independent of the home provider.
- HomeShare cannot provide emergency housing. The process of matching is a careful and somewhat time-consuming one and is not a "quick fix".
- It will take time for us to find suitable matches and for applicants to make careful decisions. People in need of short-term housing may apply, but many providers prefer a longer term commitment and referral opportunities may be limited.
- Persons with convictions for felony or misdemeanor crimes involving bodily injury, assault, elder abuse, sexual offense, possession or distribution of an illegal substance, or theft or damage of personal property are not eligible for the program. We can however, assist people in finding community resources.

QUESTIONS FOR SEEKERS

1. Why do I want to HomeShare with someone?
2. What kind of neighborhood do I want to live in?
3. Do I need a furnished or unfurnished space?
4. How much rent can I afford?
5. What is essential to me in a housemate?
6. Would I prefer living with a female, male, or a couple?
7. Do I have an age preference?
8. Would I consider living with children?
9. Do I object to smoking or drinking?
10. Would I consider living with pets?
11. What kind of a relationship do I want with my housemates? Do I just want to rent a room in a home, or do I want a friend and companion with whom to share my life?
12. Would I enjoy being a companion to an older adult? How much time am I willing to spend with them?
13. What household responsibilities do I wish to share? (For example: housework, cooking, shopping, driving, gardening, trash removal, handiwork, laundry.) What do I consider an equitable exchange for services?
14. What are my housekeeping standards? For example, how clean should common areas be kept?
15. Am I prepared to adjust to a household change in return for rent savings or companionship?
16. What are my shortcomings that might present difficulties to anyone living with me?
17. What qualities do I have that would contribute to a shared arrangement? Do I listen to and understand other people, especially when there is a difference of opinion?
18. Am I willing and able to constructively communicate my needs, or is it difficult for me to speak up when something is bothering me?
19. What things can I do to make my new HomeSharing arrangement feel like home?
20. What are my expectations when I think about sharing someone else's home?
21. How often do I have guests over? Do I ever have overnight guests?
22. How important is my private time and how much do I need?

QUESTIONS FOR PROVIDERS

1. Why do I want to HomeShare with someone?
2. Is my home or apartment suitable for sharing? For example, is there a private room for a housemate? Is there an easily accessible bathroom? Is there adequate closet or storage space? Are there structural barriers, such as stairs, that might limit who can live in my home?
3. Is the space I'm making available really ready for another person and their possessions? If not, what must I do to make it ready? Will the space be furnished or unfurnished?
4. If a person needs an unfurnished bedroom, am I willing to store my things?
5. How much rent do I need in order to satisfactorily reduce my housing cost burdens?
6. Would I like some help around the house? If yes, how much assistance do I need?
7. If I expect a service, should I reduce the rent, offer free rent, free room and board or free room and board plus compensation for the services a housemate would provide?
8. Will rental income affect my tax filing status? Please consult a tax professional for advice on this subject.
9. Am I prepared to adjust to some household changes in return for the additional income or help that I am asking?
10. To what degree do I want to share my kitchen, living room, and other common areas?
11. What household responsibilities do I wish to share? For example: housework, cooking, shopping, driving, gardening, trash removal, laundry, etc. – What are my household standards? For example, how clean should common areas be kept?
12. What is essential to me in a housemate?
13. Would I prefer living with a female, male, or a couple?
14. Do I have an age preference?
15. Would I consider living with children?
16. Do I object to smoking or drinking?
17. Would I consider living with pets?
18. What are my shortcomings that might present difficulties to anyone living with me?
19. Am I able to constructively confront problems and find amenable solutions? Do I listen and understand other people, especially when there is a difference of opinion?
20. What qualities do I have that would contribute to a shared arrangement?
21. What can I do to ensure that MY home can become OUR home when shared with another?

HOMESHARE AGREEMENT

HomeShare recommends that providers and seekers record the details of their match with a HomeShare Agreement. The agreement should include

- Room use
- Rental or service exchange details
- Provider and seeker responsibilities for chores, food, utilities, etc.

HomeShare can provide a selection of templates that providers and seekers can modify to suit their particular situation.

FREQUENTLY ASKED QUESTIONS

HOW LONG WILL IT TAKE?

Plan on anywhere from several weeks to a month or more. You can expedite the process by making sure you provide appropriate references and that they are available and will respond to our inquiries. Also, be sure to give us your current phone numbers (and let us know if they need to be updated) so that we can easily reach you. If we have someone currently on our list who meets your needs, the process will be faster than if we have to wait for the right person to come along.

Some people find a match quickly, sometimes it takes weeks or months, and some never find the right situation for themselves. It all depends on you, your specific needs and preferences, and the availability of other seekers or providers who can offer the qualities you are looking for.

HOW MUCH IS RENT?

It varies. In some situations where there are many services needed, (including regular meal preparation) the rent may be negotiable. In situations where there are few, if any services required the rent may be \$500 or more. Each HomeShare provider sets her or his own rent. **Most fall in the range of \$500 to \$600, but some providers request more.** We ask providers to remember that a HomeShare is not the same as renting an apartment in terms of the amount of rent. As a rule, the more services needed, the less rent someone will be willing to pay. For a no-rent situation, a reasonable service exchange would be a maximum of 10 to 12 hours or work, per week.

All household members are expected to do their share of chores to keep common areas clean and safe. The services a seeker may provide in lieu of rent are over and above these expectations.

WHAT IF I DON'T KNOW WHAT TO CHARGE?

Ventura County HomeShare cannot make that decision for you, but we can tell you what some other people in similar situations have charged. We suggest you talk it over with family or friends. You can look in the newspaper for market value rents. Take time to carefully think through just what services you would like to have provided. Most of the people seeking HomeShare situations are doing so to save money and to cultivate family-like relationships with older people.

WHAT IF I DON'T LIKE THE PERSON AFTER WE ARE LIVING TOGETHER?

This is the reason for the trial period option. It gives you some real experience together before a definite decision is made. Even after the agreement is signed you can terminate the arrangement. But don't give up too easily. Sometimes all that is needed is some honest communication and clear statement of your needs. HomeShare is available to help smooth out the rough spots in your relationship.

HOW LONG DO HOMESHARE MATCHES LAST?

Again, it varies. Some last for years, others for months. Sometimes a person moves away, or an older homeowner may become disabled and need to live in a more supportive environment. Family situations change and with that living arrangements are altered.

WHAT ARE THE USUAL AGES OF HOMESHARE APPLICANTS?

Most of our seekers are in their 60s with significant numbers between 50 and 70 years of age. The balance range from 20-somethings to 80+. Most, but not all, of the providers are senior citizens who want to stay in their own homes, but desire some company or need help with home maintenance. Some senior homeowners do not need services, but do need the additional income provided by rent.

RESOURCE LIST

TENANT/LANDLORD LAW FOR STATE OF CALIFORNIA

www.dca.ca.gov/publications/landlordbook/catenant.pdf

Online copy of government publication titled “California Tenants: a guide to residential tenants” and landlords’ rights and responsibilities.

This publication addresses “single lodger in a private residence”, and all aspects of CA housing laws.

AREA HOUSING AUTHORITY OF THE COUNTY OF VENTURA – COMMUNITY RESOURCE LIST

http://www.ahacv.org/community_resources.shtml

- other local Housing Authorities
- community housing resources
- rental listings
- and more

SHELTERS AND EMERGENCY HOUSING

- **Homeless Information and Referral**
(Count of Ventura, Human Services Agency)
Phone 888-472-4463
Website: <http://www.ventura.org/human-services-agency/homelessness-prevention-assistance>
- **Ventura County Homeless and Housing Coalitions**
(temporary winter shelter locations)
Website: www.vchhc.org
- **Ojai Community Assistance Program and Valley Outreach**
(through HELP of Ojai)
Phone: 805-640-3320
Address: 108 Fox Street, Ojai
Website: www.helpofojai.org
- **Coalition For Family Harmony**
Phone: 805-983-6014
24-hr Hotline: 800-300-2181
Website: www.thecoalition.org

- **RAIN Project Transitional Living Center**
(County of Ventura)
Phone: 805-389-3308 (24-hrs)
Address: 1732 South Lewis Road, Camarillo
Website: www.raincommunities.org
- **Community Action of Ventura County**
Phone: 805-436-4000
Address: 621 Richmond Avenue, Oxnard
Website: www.ca-vc.org
- **Homeless Prevention and Rapid Rehousing Program**
(county of Ventura, Human Services Agency)
Phone: 805-385-8585
Website: www.vchsa.org/hprp
- **Simi Valley Samaritan Center**
Phone: 805-579-9166
Address: 280 Royal Avenue, Simi Valley
- **Salvation Army**
Phone: 805-483-9235 Phone: 805-659-3598
Address: 622 West Wooley Road, Oxnard Address: 650 South Petit Ave, Ventura

ADULT PROTECTIVE SERVICES

Human Services Agency: Adult Protective Services

<http://www.ventura.org/human-services-agency/adult-protective-services>

24 Hour Hotline 805-654-3200

MANDATED REPORTERS

California Law – Welfare and Institutions Code regarding mandated reporters

www.leginfo.ca.gov/calaw.html

DOMESTIC VIOLENCE

National Domestic Violence Hotline

800-799-SAFE



TELEPHONE INTERVIEW GUIDE

It is often the little things that can make or break a home-share relationship. HomeShare suggests that you conduct a telephone interview before meeting your candidate in person. After your call, take some time to reflect on the interview. If you feel like you have a good candidate, you can speak with HomeShare staff about setting up a face-to-face interview.

The following questions can serve as a guide for your conversation:

1. Are you looking for company/companionship?
2. What time do you generally wake up in the morning?
3. What time do you generally go to bed at night?
4. How often do you drink? ☐Never ☐Rarely ☐Socially ☐Weekends ☐Nightly ☐Daily
5. How often do you have visitors? ☐Days only ☐Often ☐Overnight ☐Seldom
6. How often do you have children visit? ☐Always ☐Sometimes ☐Never
7. How often do you watch television? ☐Never ☐Rarely ☐Sometimes ☐Daily ☐Evenings
8. How strict are your housekeeping standards? ☐Neatness only ☐Some clutter
☐Does not matter
9. What is your definition of “clean”?
10. How often do you use the kitchen? ☐Heavily ☐Moderately ☐Seldom ☐Never
11. Do you have any important food needs or allergies?
12. What type of food do you usually eat?
13. Would you be interested in sharing any food items or cooking together occasionally?
14. What types of activities do you prefer? ☐Indoor ☐Outdoor
15. How would you describe your activity level? ☐At home most of the time ☐On the go ☐Some of each
16. How much stuff do you have?
17. How much space do you need?
18. Do you have your own television, stereo, music player? Do you ever play loud music?
19. What is your tolerance for noise?
20. Are you generally sociable and friendly?
21. How long do you expect to need/want to live in the home?
22. Are you willing to share: ☐Laundry machines ☐Kitchen and utensils ☐Telephone
☐Other living space ☐Internet/computer
23. Do you have any health issues or considerations I should know about?



FACE-TO-FACE INTERVIEW GUIDE FOR PROVIDERS

After the initial telephone contact with a potential homesharer, take some time to reflect on the conversation. How do you feel the conversation went? Were you able to clearly express your most important need? Often during the initial contact it is difficult to ask all the exploratory questions you planned to ask. Don't worry, that is normal!

If you feel that you have a good candidate, you will want to set up a face-to-face interview. This is a great way to get to know and understand each other's personality, habits and lifestyles.

Consider scheduling the interview at a neutral setting such as a coffee shop, library, park or restaurant. A small conference room is available at the VCAA for use in 30 minute time-blocks. If your face-to-face meeting will take place at the VCAA offices, you can choose to have a HomeShare staff member present during the interview.

Reviewing the Topics for Discussion can be an effective guide through the interview. These questions will assist you in structuring your conversation and assist you in obtaining important information.

Don't be shy about stating what you want and asking questions. Remember, if you spend time clarifying each of your expectations at the beginning of the relationship, the more apt you will be to have a successful homesharing arrangement!

No decisions are made at the interview. We suggest both people reflect on it for a couple of days. You may think of other questions afterwards or decide you'd like to meet again or talk on the phone. Please let your potential homesharer know how and when you will follow up with them. Often it will take meeting several people before you find the right one. It's not unusual to consider more than one candidate.

INTERVIEW TOPICS FOR DISCUSSION

1. What expectations do each of you have about homesharing?
2. What are your methods of working out problems or difficulties?
3. How do you feel about visitors? How often? Overnight guests? Romantic overnight guests?

SAMPLE INTERVIEW QUESTIONS TO A HOME SEEKER

1. Have you shared housing before (other than with your immediate family)?
2. What is your current living situation?
3. Why are you looking to change it?
4. When would you need/want to move in?
5. How long do you expect to need/want to homeshare?
6. What are your long-term plans?
7. How long have you lived in the area?
8. Where have you lived before?
9. What is your work and education experience?
10. What is your daily routine? (work schedule, meal times, exercise?)
11. Do you function better early in the morning or late at night?
12. What do you like to do in your spare time and on weekends? (TV, musical tastes, visit friends)
13. Do you want to have guests? (daytime/overnight/evening/romantic overnights)
14. Will you be spending time away (vacations, weekends away)?

4. Are you willing to let me know when you are leaving and when you expect to be back?
5. What is your tolerance for noise?
6. Do you have your own television and/or stereo? Do you ever play loud music?
7. Do you spend a lot of time on the telephone? Would you share a telephone? Or prefer a separate line?
8. What do you like to eat? Do you enjoy cooking? Would you like to eat with the person you are living with?
Do you prefer to shop, cook, and eat together or alone?
9. Are you active outside the home? Or do you prefer to stay in?
10. Are you a talkative person? Are you shy?
11. Do you enjoy conversations and company?
12. Do you need alone time? How much? Is it easy for you to tell someone when you need company (or private time) or do you usually expect them to ask you?
13. Do you have pets? Do they have a certain schedule?

IF THERE IS GOING TO BE A SERVICE EXCHANGE AS PART OF THE HOMESHARING AGREEMENT:

1. If you are asking for help with cooking: What kind of cooking do you do? (specify your food preferences)
2. If you are asking your housemate to drive you as part of the service exchange, ask to see their license and current insurance card.
3. Are there any other expectations of companionship or services?

ABOUT YOUR HOME

1. Laundry facilities
2. Storage space (including space for food storage)
3. Internet service or cable service
4. Phone
5. Food expenses (shared or bought separately)
6. Sharing of kitchen and kitchen utensils?
7. How do you propose to share, if applicable, some or all of the following:
 - a. Housekeeping
 - b. Cooking
 - c. Meal planning
 - d. Errands/shopping
 - e. Lawn work
 - f. Laundry
 - g. Other
8. Thermostat settings; what is comfortable for you? Heater in winter/AC in summer?

HEALTH

- Allergies?
- Special accommodations?

POST INTERVIEW

After the face-to-face interview, take time to reflect on the meeting. The questions below can help you to sort through your feelings and impressions following the interview. It may be helpful to refer to your notes from the interview and write your impressions of the meeting on paper, because it is easy to forget important questions.

The section below can help you to determine if this is a compatible homesharer for you and to ensure that all of your important questions have been asked and sufficiently answered. If you have additional questions or concerns about your prospective homesharer, write them down and then call or schedule another meeting.

CHECKLIST FOR HOME PROVIDERS

1. Did I discuss what I feel is important in a homesharing arrangement?
2. Have I asked questions about lifestyle preferences which are important to me?
 - ☐ Chores in exchange for rent
 - ☐ Television habits and schedules
 - ☐ Indoor temperature preferences during summer and winter months
 - ☐ Work, sleep and wake-up schedules
 - ☐ Entertaining at home/guests
 - ☐ Guests
 - ☐ Music preferences and volume
 - ☐ Privacy needs
 - ☐ Other areas of concern:
3. Have I clearly stated the extent to which I am willing to share common rooms, kitchen and outdoor space?
4. Have we agreed on food purchasing, meal preparation, eating schedule and sharing meals? Does this need to be structured, semi-structured, or do our expectations/need allow for some meal sharing to evolve over time?
5. Have we agreed about who will be responsible for what household chores and schedules?
6. Have we agreed on the financial arrangements (rent, utilities, groceries, etc.)?
7. What do I like most about this prospective homesharer?
8. Does this potential homesharer have a similar lifestyle, values, and needs?
9. Do I have any reservations about this prospective homesharer? What are the reservations?
10. Do I think our differences can be worked out?
11. Are there any other issues or needs?
12. Have we agreed to a trial period of living together before allowing the home seeker to move in permanently (if possible?)
13. Have we discussed using a written agreement to specify obligations and expectations?

AGREEING TO MATCH

Your interview has gone well and you both want to live together. Congratulations!

Before you move in together, consider establishing a trial period. A typical trial period is two weeks; however you might consider up to a month-long trial period. A trial period gives each of you an opportunity to try out your new relationship before renewing your commitment for a longer period of time. If at all possible, the home seeker should consider maintaining his or her present housing during the trial period. The trial period is spelled out in a

written agreement that includes other important understandings of what you will give to and receive from each other.

A few things to keep in mind...

- Clearly state what you want
- Clarify that both the home provider and the home seeker have the same expectations
- If the agreement includes a service exchange, clearly identify the homesharers' responsibilities with a written list of services and work out a schedule of when services should be done
- HomeShare staff can provide you with several different HomeShare agreement templates, for a trial period and a formal match.



FACE-TO-FACE INTERVIEW GUIDE FOR SEEKERS

After the initial telephone contact with a potential homesharer, take some time to reflect on the conversation. How do you feel the conversation went? Were you able to clearly express your most important need? Often during the initial contact it is difficult to ask all the exploratory questions you planned to ask. Don't worry, that is normal!

If you feel that you have a good candidate, you will want to set up a face-to-face interview. This is a great way to get to know and understand each other's personality, habits and lifestyles.

Consider scheduling the interview at a neutral setting such as a coffee shop, library, park or restaurant. A small conference room is available at the VCAA for use in 30 minute time-blocks. If your face-to-face meeting will take place at the VCAA offices, you can choose to have a HomeShare staff member present during the interview.

Reviewing the Topics for Discussion can be an effective guide through the interview. These questions will assist you in structuring your conversation and assist you in obtaining important information.

Don't be shy about stating what you want and asking questions. Remember, if you spend time clarifying each of your expectations at the beginning of the relationship, the more apt you will be to have a successful homesharing arrangement!

No decisions are made at the interview. We suggest both people reflect on it for a couple of days. You may think of other questions afterwards or decide you'd like to meet again or talk on the phone. Please let your potential homesharer know how and when you will follow up with them. Often it will take meeting several people before you find the right one. It's not unusual to consider more than one candidate.

INTERVIEW TOPICS FOR DISCUSSION

1. What expectations do each of you have about homesharing?
2. What are your methods of working out problems or difficulties?
3. How do you feel about visitors? How often? Overnight guests? Romantic overnight guests?

SAMPLE INTERVIEW QUESTIONS TO ASK A HOME PROVIDER

1. Have you shared housing before (other than with your immediate family)?
2. What is your current living situation?
3. Why are you looking to change it?
4. When would the room be available?
5. How long do you expect to need/want to homeshare?
6. What are your long-term plans?
7. How long have you lived in the area?
8. Where have you lived before?
9. What is your work and education experience?
10. What is your daily routine? (work schedule, meal times, exercise?)
11. Do you function better early in the morning or late at night?
12. What do you like to do in your spare time and on weekends? (TV, musical tastes, visit friends)
13. Do you want to have guests? (daytime/overnight/evening/romantic overnights)
14. Will you allow me to have guests? (daytime/overnight/evening/romantic overnights)

15. Will you be spending time away (vacations, weekends away)?
16. Are you willing to let me know when you are leaving and when you expect to be back?
17. What is your tolerance for noise?
18. Do you ever play loud music?
19. Do you spend a lot of time on the telephone? Would you share a telephone? Or prefer a housemate to have a separate line?
20. What do you like to eat? Do you enjoy cooking? Would you like to eat with the person you are living with? Do you prefer to shop, cook, and eat together or alone?
21. Are you active outside the home? Or do you prefer to stay in?
22. Are you a talkative person? Are you shy?
23. Do you enjoy conversations and company?
24. Do you need alone time? How much? Is it easy for you to tell someone when you need company (or private time) or do you usually expect them to ask you?
25. Do you have pets? Do they have a certain schedule?

IF THERE IS GOING TO BE A SERVICE EXCHANGE AS PART OF THE HOMESHARING AGREEMENT:

1. If the provider is asking for help with cooking: What kind of cooking do they do? What are their food preferences?
2. Are there any other expectations of companionship or services?

ABOUT THE HOME

1. Laundry facilities
2. Storage space (including space for food storage)
3. Internet service or cable service
4. Phone
5. Food expenses (shared or bought separately)
6. Sharing of kitchen and kitchen utensils?
7. How do you propose to share, if applicable, some or all of the following:
 - a. Housekeeping
 - b. Cooking
 - c. Meal planning
 - d. Errands/shopping
 - e. Lawn work
 - f. Laundry
 - g. Other
8. Thermostat settings; what is comfortable for you? Heater in winter/AC in summer?

HEALTH

- Allergies?
- Special accommodations?

POST INTERVIEW

After the face-to-face interview, take time to reflect on the meeting. The questions below can help you to sort through your feelings and impressions following the interview. It may be helpful to refer to your notes from the interview and write your impressions of the meeting on paper, because it is easy to forget important questions.

The section below can help you to determine if this is a compatible homesharer for you and to ensure that all of your important questions have been asked and sufficiently answered. If you have additional questions or concerns about your prospective homesharer, write them down and then call or schedule another meeting.

1. How do I feel about the location and neighborhood? Would I be happy living there?
2. Is this location close to my job, school, family and friends?
3. Is this location close to stores, transportation and services?
4. Is this affordable housing for me?
5. Are my preferences similar to my potential home provider's?
6. What do I like most about this potential home provider and his/her home?
7. Do I have any reservations about the home provider or her/his home?
8. Could any of these things be changed, negotiated, or overcome to better suit me?
9. Have I asked questions about lifestyle preferences which are important to me? For example, have we discussed:
 - ☐ Chores in exchange for rent
 - ☐ Television habits and schedules
 - ☐ Indoor temperature preferences during summer and winter months
 - ☐ Work, sleep and wake-up schedules
 - ☐ Entertaining at home/guests
 - ☐ Guests
 - ☐ Music preferences and volume
 - ☐ Privacy needs
 - ☐ Meal preparation, eating schedule and sharing meals together?
 - ☐ Other areas of concern:
10. To what extent will the common areas, kitchen, and outdoor space be shared?
11. What, if any, daily activities will be shared?
12. Do I feel satisfied that there are no important unspoken needs that may arise in the future?
13. Have we agreed on the financial arrangements (rent, utilities, groceries)?
14. Have we agreed to a trial period of living together before I move in permanently?
15. Have we discussed using a written agreement to specify obligations and expectations?

AGREEING TO MATCH

Your interview has gone well and you both want to live together. Congratulations!

Before you move in together, consider establishing a trial period. A typical trial period is two weeks; however you might consider up to a month-long trial period. A trial period gives each of you an opportunity to try out your new relationship before renewing your commitment for a longer period of time. If at all possible, the home seeker should consider maintaining his or her present housing during the trial period. The trial period is spelled out in a live-in agreement that includes other important understandings of what you will give to and receive from each other.

A few things to keep in mind...

- Clearly state what you want
- Clarify that both the home provider and the home seeker have the same expectations
- If the agreement includes a service exchange, clearly identify the homesharer's responsibilities with a written list of services and work out a schedule of when services should be done
- HomeShare staff can provide you with several different HomeShare agreement templates, for a trial period and a formal match.

ADDITIONAL QUESTIONS FOR FAMILIES WITH CHILDREN

These questions are important topics of discussion for those who are homesharing with children. Include any additional questions that you find valuable. The following questions can help to clearly state expectations and may prevent later misunderstandings.

1. What is your daily routine? Your weekly routine?
2. Will you be exchanging child care (if both home seeker and home provider have children)? How many hours per week?
3. Will you be exchanging child care services for a reduction in rent? Clearly state what services, about how many hours per week are expected, and what the reduction in rent will be.
4. Are you willing to carpool?
5. Describe the types of support you have available, - family, friends, childcare, etc.
6. Would you like to view our household as a family unit? How much are you willing to share?
7. Are you willing to plan procedures in case of an emergency? What type of emergencies?
8. Describe the style of discipline you exercise with your child. What are your thoughts about disciplining other children if it becomes necessary? Other adults disciplining your children?
9. What "stages" are you children in?
10. Do you have a set of household rules for your children Please describe them
11. Do you have rules in place about viewing television? What are you rules?
12. Do you have rules set up about your child's play? What types of toys do you allow?
13. What is your children's bedtime? Do you children wake up at night? How often? Why?
14. How do your children interact with other children? Other adults
15. How clean and tidy should the house be kept? Do children leave toys around? Do you clean regularly or when things seem to need it?
16. Are you willing to assign household chores according to age?
17. Will friends or relatives visit frequently, occasionally, stay overnight, share food costs, etc.? Should arrangements be made in advance?
18. How many housemates have you had in the past year? What do you feel worked and what did not work for you and your children?
19. How do you think your children will feel about sharing a home with another person or family?

HOME SEEKER AND PROVIDER INTAKE

Name: _____ Date _____

Address: _____

Phone/email _____ / _____

Home Seeker/Provider Questions

1. Describe your current living situation.

2. How long have you lived in this present situation? _____

- a. Rent/Own- If rent, do you have written permission from your landlord to home share? Yes/No
b. Number of people living in the home? _____

3. HS -Are you currently homeless?

If yes, how are you coping?

4. Are you working with another social service agency?

5. Have you ever been evicted?

6. Do you have children who would be sharing a home with you or are you willing to live with children?

Ages: _____

7. Are you willing to live with a couple? Yes/No

- a. Do you need to be married? Yes/No

8. Why are you interested in home sharing?

9. Have you home shared or lived with a roommate in the past? If yes- describe the situation (best and worst experiences)

10. What might someone find challenging living with you?

11. What strengths would you bring into the match?

12. How would you describe yourself to a potential home provider/seeker?

13. What is your work and education experience?

14. What is your daily routine (wake up time, work hours, regular activities, night routine, etc.)?

15. How will you support yourself while you home share?

16. How much alone or quiet time do you need?

17. What are some of your hobbies and interests?

18. What are your TV and music preferences, would you be bothered by another person's tv/music habits?

19. Do you have any chronic health conditions or physical disabilities?

20. Do you have a mental health history or diagnoses?

21. Have you been hospitalized for physical or mental health reasons in the last five years?

a. If so, when and what for?

22. Are you currently taking any medications?

23. In the past five years have you received services from a counselor, therapist, psychiatrist or psychologist?

24. Are you currently receiving services from a counselor, therapist, psychiatrist or psychologist?

25. Can we call your mental health provider? Yes/No

26. Mental Health Professional Contact Information:

27. Have you ever attempted suicide or had suicidal ideation?

28. Have you ever had challenges with drug or alcohol abuse?

- a. If yes, describe any treatment received and length of time sober.

29. What coping skills do you use to help manage your day to day life?

30. Tell us about your support systems in your life?

31. In the past, how have you handled disappointment, adversity, or conflict?

32. Describe the type of person and home that would be the ideal home sharing situation for you. Be specific.

Service Exchange Questions

33. What types of service exchange would you be willing to assist a Home Provider with or what service are you needing from the home seeker?

Gardening ____ Yardwork ____ House Keeping ____ Snow Shoveling ____ Driving ____

Pet Care ____ Meal Preparation ____ Laundry ____ Med Management ____ House Maintenance ____

Trash ____ Grocery Shopping ____ Errands ____ Night Presence/Security ____

Other: _____

If HP: Who is helping you with these things currently? _____

34. Are there any activities you would be willing to do with the Home Provider/Seeker (ex. cards, sharing meals, going to shows)?

35. Would you like to split food costs if sharing meals? Yes/No

36. Are you willing to share the commons areas of the living space?

37. **HS:** Do you need extra space besides a bedroom for storage? Do you currently have storage unit you are storing your belongings in? Please describe what you'll be moving into the home. (Ex. Bedroom furniture, couch, bicycle, boxes of belongings, etc.) **HP:** how much extra storage space are you offering if any?

Home Logistics

Bedrooms	
Private Bathroom	
Shared Bathroom	
Laundry	
Parking	
Storage	

Home Seeker/Provider Personality Profile

Match Preferences			Person		
Would you be willing to live with a dog?	YES	NO	I have a dog.	YES	NO
Would you be willing to live with a cat?	YES	NO	I have a cat.	YES	NO
Would you be willing to live with other exotic pets?	YES	NO	I have exotic pets.	YES	NO
Would you be willing to live with someone that stays up late at night (after 11:00PM)?	YES	NO	I stay up late at night (after 11:00PM)	YES	NO
Would you be willing to live with someone who gets up very early (before 6:00AM)?	YES	NO	I get up very early (before 6:00AM)	YES	NO
Would you be willing to live with someone who entertains friends and family in the home?	YES	NO	I entertain friends and family in my home.	YES	NO
Would you be willing to live with someone who has friends or family stay the night with them at times?	YES	NO	I have friends or family stay the night with them at times.	YES	NO

Would you be willing to live with someone with strong religious preferences?	YES	NO	I have strong religious preferences.	YES	NO
Would you be willing live with someone who smokes?	YES	NO	I smoke.	YES	NO
Would you be willing to live with someone who drinks alcohol in moderation?	YES	NO	I drink alcohol in moderation.	YES	NO
Would you be willing to live with someone who uses marijuana?	Recreational- Yes Medical- Yes	Recreational- No Medical- No	I use marijuana.	Recreational- Yes Medical- Yes	Recreational- No Medical- No
Would you be willing to live with a male?	YES	NO	Identifies As Male	YES	NO
Would you be willing to live with a female?	YES	NO	Identifies as Female	YES	NO
Would you be willing to live with someone who is a part of the LGBTQ community?	YES	NO	Identifies as LGBTQ	YES	NO
Would you be willing live with someone with a physical disability?	YES	NO	Identifies as a person with a physical disability	YES	NO

Would you be willing to live with someone with a history of mental health challenges?	YES	NO	Identifies as someone with a hx of behavioral health challenges	YES	NO
Would you be willing to live with children?	YES	NO	Has children	YES	NO
Would you be willing to live with someone who speaks limited English?	YES	NO	Speaks Limited English	YES	NO
Would you need to live with someone who is a _____ cleaner?	Meticulous Moderately Clean More Relaxed	No Preference	I am a _____ cleaner.	Meticulous Moderately Clean More Relaxed	No Preference
Would you need to live with someone who owns a car?	YES	NO	I own a car.	YES	NO
Would you be willing to live with someone...?	20-30 y/o 30-40 y/o 40-50 y/o 50-60 y/o 60-70 y/o 70-80 y/o 80-90 y/o 90+ y/o		I am	20-30 y/o 30-40 y/o 40-50 y/o 50-60 y/o 60-70 y/o 70-80 y/o 80-90 y/o 90+ y/o	
Would you be willing to live with someone who owns a gun?	YES	NO	I own a gun?	YES	NO
Would you require a housemate with special dietary restrictions?	Kosher Vegan Vegetarian Diabetic Gluten free Other	None	I have specialty dietary restrictions	Kosher Vegan Vegetarian Diabetic Gluten free Other	None

Service Exchange					
I can provide/need _____ service hours per week.	0-5 5-10 10-15 15-20 20-25 25-30 30+	I can provide/need _____ hours of companionship per week.	0-5 5-10 10-15 15-20 20-25 25-30 30+		
ABOUT THE HOME					
The home needs to be in or is in _____	Denver Arapahoe Jefferson Adams Broomfield Aurora El Paso Douglas	No Preference	The maximum rent I can pay is _____ Or Mas rent asking is _____	\$0-250 \$251-450 \$451-600 \$601-750 \$751-900 \$900 and higher	
The rent needs to include utilities or does include	YES	NO	The home needs to have or has wifi	YES	NO
The home needs to or has cable.	YES	NO	The home needs or has storage space for personal furniture/boxes.	YES	NO
The bedroom needs to be on the or is on _____.	Basement Floor Main Floor Second Floor	No Preference	The house needs to be accessible.	YES	NO
The room needs to be or is _____	Furnished Unfurnished	No Preference	The home needs to have or does have a private bathroom	YES	NO

The temperature of the house needs to be....	65-69 70-75 75 or higher	No Preference			
--	--------------------------------	---------------	--	--	--

What are your current COVID protocols that you practice?

Do you have any questions or concerns about home sharing that we did not cover?

Financial Social Work Questions

1. Are you home sharing for financial reasons (ex. unable to pay market rate rent, need to pay off debt, etc.)?

2. Do you currently utilize a budget and/or track your expenses?

3. Do you have financial goals that you'd like to achieve?

Other Information and Referral Services Provided:

Care Management	Transportation	Food	Home Repair	Matching Website
Housing Services	In-home services	Medicare/Medicaid Information	Employment	

Other: _____

Referrals Made

Staff Comments:

Financial Social Work Questions

1. Are you having difficulty paying your mortgage/rent? YES / NO

If yes- please explain

2. Are you current on all of your bills?

3. Are you currently in any high interest loans?

4. Are you receiving LEAP Assistance? If not and eligible would you like someone to help you apply?

5. Are you currently receiving the City and County of Denver Tax Rebate? If not and eligible would you like someone to help you apply?

6. Are you currently receiving the Homestead Exemption Tax Rebate? If not and eligible would you like someone to help you apply?

Background Check Authorization Form

Print Name: _____

(First)

(Middle)

(Last)

Former Name(s) and Dates Used: _____

Current Address Since: _____

(Mo/Yr)

Street

City

State/ZIP

Social Security Number: _____ Date of Birth: _____

Telephone Number(s): _____

The information contained in this application is correct to the best of my knowledge. I hereby authorize Sunshine Home Share Colorado and its designated agents and representatives to conduct a comprehensive review of my background causing a consumer report and/or an investigative consumer report to be generated for employment, intern, or volunteer purposes. I understand that the scope of the consumer report/investigative consumer report may include, but is not limited to the following areas: verification of social security number; current and previous residences; employment history, education background, character references; drug testing, civil and criminal history records from any criminal justice agency in any or all federal, state, and county jurisdictions; driving records, birth records, and any other public records.

I further authorize any individual, company, firm, corporation, or public agency (including the Social Security Administration and law enforcement agencies) to divulge any and all information, verbal or written, pertaining to me, to Sunshine Home Share Colorado or its agents. I further authorize the complete release of any records or data pertaining to me which the individual, company, firm, corporation, or public agency may have, to include information or data received from other sources.

I hereby release Sunshine Home Share of Colorado, the Social Security Administration, and its agents, officials, representative, or assigned agencies, including officers, employees, or related personnel both individually and collectively, from any and all liability for damages of whatever kind, which may, at any time, result to me, my heirs, family, or associates because of compliance with this authorization and request to release.

Signature: _____ Date: _____



Home Sharing Guide

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Home Sharing Basics

Vision Statement

Building connections to support independence in aging and affordable housing.

Mission Statement

Sunshine's mission is to promote aging at home through care management and a safe home-sharing model generating income and assistance for older adults while accessing untapped affordable housing and resources for home seekers.

What is Home Sharing?

Sunshine Home Share Colorado is a nonprofit organization helping you utilize the extra space in your home as a way to generate income, receive assistance with basic household chores, decrease isolation, and help provide housing to someone needing an affordable place to live. Trained staff support a safe and thoughtful process including background and reference checks as well as a thorough interview and screening process, allowing you to make the best match that works for you.

Home Sharing is an arrangement where two or more unrelated people share a dwelling, each having her or his private space and sharing certain common areas. A shared arrangement involves a Home Provider and a Home Seeker, or two or more people renting a house or apartment together. Home Providers arrange a regular rental agreement or exchange services for part or all of the rent. No two Home Sharing situations are alike, each is created to the needs and desires of the people involved.



Deciding if Home Sharing is Right for You

Questions to ask yourself

Home Seekers

1. Why do I want to Home Share with someone?
2. What kind of neighborhood do I want to live in?
3. Do I need a furnished or unfurnished space?
4. How much rent can I afford?
5. What is essential to me in a housemate?
6. Do I prefer Home Sharing with a female, male, couple? Or, do you have no preference?
7. Do I have an age preference?
8. Would I consider living with children?
9. Do I object to smoking or drinking?
10. Would I consider living with pets?
11. What kind of a relationship do I want with my housemates? Do I just want to rent a room in a home, or do I want a friend and companion with whom to share my life?
12. What household responsibilities do I wish to share? (For example: housework, cooking, shopping, driving, gardening, trash removal, handiwork, laundry) What do I consider an equitable exchange of services for a reduction in the rent?
13. What are my housekeeping standards? For example, how clean should common areas be kept?
14. Am I prepared to adjust to a household change in return for rent savings or companionship?
15. What are my shortcomings that might present difficulties to anyone living with me?



16. What qualities do I have that would contribute to a shared arrangement? Do I listen to and understand other people, especially when there is a difference of opinion?
17. What things can I do to make my new Home Sharing arrangement feel like home?

Home Providers

1. Why do I want to Home Share with someone?
2. Is my home or apartment suitable for sharing? For example, is there a private room for a housemate? Is there an easily accessible bathroom? Is there adequate closet or storage space? Are there structural barriers, such as stairs, that might limit who can live in my home?
3. Is the space I'm making available really ready for another person(s) and their possessions?

If not, what must I do to make it ready? Will the space be furnished or unfurnished?
4. If a person needs an unfurnished bedroom, am I willing to store my things?
5. How much rent do I need in order to satisfactorily reduce my housing cost burdens?
6. Would I like some help around the house? If yes, how much assistance do I need?
7. If I expect a service, should I reduce the rent, offer free rent, free room and board, or free room and board plus compensation for the services a housemate would provide?
8. Am I prepared to adjust to some household changes in return for the additional income or help that I am asking?
9. To what degree do I want to share my kitchen, living room, and other common areas?



10. What household responsibilities do I wish to share? For example: housework, cooking, shopping, driving, gardening, trash removal, laundry, etc. - What are my household standards? For example, how clean should common areas be kept?
11. What is essential to me in a housemate?
12. Do I prefer a female, male, couple?
13. Do I have an age preference?
14. Would I consider living with children?
15. Do I object to smoking or drinking?
16. Would I consider living with pets?
17. What are my shortcomings that might present difficulties to anyone living with me?
18. Am I able to confront problems and find amenable solutions? Do I listen and understand other people, especially when there is a difference of opinion?
19. What qualities do I have that would contribute to a shared arrangement?
20. What can I do to ensure that MY home can become OUR home when shared with another?



Program Expectations and Limitations

1. In every Home Share match the Home Provider must be over the age of 55.
2. All applicants must pass a clean background, Department of Motor Vehicle (DMV), and credit check with verifiable income
 - A clean background is defined as no significant felonies or misdemeanors. Failure to disclose may disqualify you from consideration
 - A clean DMV record contains no traffic or DUI violations. If your record does have traffic or DUI violations, this information may not eliminate your eligibility for the program. However, if a service exchange requiring driving is part of your contract, the Home Seeker or Home Provider will need to divulge this information to one another.
 - Participants must show verifiable proof of income. Poor credit history is not an immediate disqualification but may influence the decision of either party in their decision to enter into a home sharing arrangement.
3. Have three verifiable references. Only one may be from a family member.
4. Home Providers will be asked that utilities, property taxes, and mortgage payments are in good standing and home is not in jeopardy of foreclosure.
5. Individuals accepted as Home Seekers need to have an income level sufficient to pay rent and/or have time and willingness to provide some services for a reduction in rent, or both.
6. Individuals with current, untreated substance abuse problems cannot be served by Sunshine Home Share. Persons in recovery must have two years' abstinence that can be substantiated with documentation.
7. Successful Home Shares must have a degree of emotional stability, which allows them to be interested and involved in the welfare of others. This program is not appropriate for someone who may have challenges that would create additional stress in a home living arrangement.
8. Sunshine Home Share does not provide home health care. If an applicant needs a great deal of personal care or cannot be left unattended, this program is not appropriate. Home Sharers



can provide companionship and household help, but it should be expected that Home Seeker's will have activities of their own, independent of the Home Provider. Home sharing may be part of the services provided, but coordination of multiple services may be needed.

9. Home Share cannot provide emergency housing. The process of matching is a careful and somewhat time-consuming one and is not a "quick fix."
10. Our goal is to promote suitable, long-lasting Home Share arrangements. Our experience is that hurried matches do not last. It will take time for us to find suitable matches and for applicants to make careful decisions. People in need of short-term housing may apply, but many providers prefer a longer-term commitment and referral opportunities may be limited.
11. Home Seekers and Home Providers are asked to make at least a 6-month commitment to their Home Sharing arrangement. If challenging circumstances make this unattainable, this can be discussed.
12. Sunshine abides by fair housing laws. All decisions regarding the final move in in rest with the Home Seekers and Home Providers to choose each other.
13. All matches will be required to participate in quarterly home visits for the first year of their match. This includes a Sunshine staff member coming in and discussing the strengths and challenges of the match thus far and conducting any mediation needed.



Home Sharing Procedures

Program Process

Step 1: Social Service Intake (2 Hours)- Staff will conduct an intake with every participant asking questions about personality, mental health, hobbies, home logistics, service needs, etc. to screen and better match you with a potential Home Provider or Home Seeker.

Step 2: -References Checked (1 hour) Every applicant must have three verifiable references. Staff will contact all references.

Step 3: Background and Credit Check (0.15 Hours)- Background, DMV, and Credit Checks are pulled and reviewed by Sunshine staff for safety.

Step 4: Optional Financial Coaching Session (2 Hours)- Home sharing is an opportunity to develop financial stability and create financial goals. We have a trained staff member who can meet in a one-on-one session with each applicant to support a path to better financial health.

Step 5: Coordination of Match Meetings (1 Hour)- Sunshine staff will contact both the Home Provider and Home Seeker to set up the first match meeting. Coordinating schedules can take time.

Step 6: Match Meetings Match Meetings (2-3 Hours Each)- Sunshine staff are present for the first match meeting. This is to ensure safety and to help facilitate the conversation. Home Providers and Home Seekers may conduct multiple match meetings before finding a potential housemate. If the first match meeting is successful you are encouraged to meet 2-3 more times on your own. Insuring you know each other fairly well before moving on.

Step 7: Trial Match Contract (1 Hour)- Sunshine strongly encourages a 2-week trial match. This is recommended so each party experiences living together before the final move-in. Staff meet at the home to discuss the Trial Match and set length of stay. Participants sign a document stating this is only a trial match for a specified time. During the Trial Match staff check in formally and are available for support.



Step 8: Living Together Contract Completed (3 Hours) - If the Trial Match is successful, the Home Provider and Home Seeker work with staff and discuss all the details of living together including service exchange expectations, communication plans, rent, space, limitations, cleanliness, etc. Setting these parameters before move-in defines the expectations for a successful home sharing relationship.

Step 9: Phone Check In (0.5 Hours)- Sunshine staff check in one to three weeks into the match making sure no additional support is needed. Our staff are available for support as needed throughout the match.

Step 10: Quarterly Care Management Home Visits (2 Hours)- Staff assist throughout but conduct quarterly check in's (4x/year). This is a discussion of challenges and successes where home seekers and home providers receive support from staff to continue in a healthy match.

Step 11: Mediation (2 Hours)- If needed, Sunshine staff or an outside mediator will conduct a home visit to facilitate a conversation about the challenges that have risen to help come to amicable solutions.

Step 12: Exit Plan (2 Hours)- If and when a match ends, Sunshine staff conduct a home visit discussing the exit plan. This may include final rent payment, date of move out, cleanliness of space, etc.

Step 13: Debrief (1-2 Hours)- Sunshine staff members will meet with the Home Provider and Home Seeker separately to process the end of the match. This will include talking about the positive aspects of home sharing that were experienced, the biggest challenges faced, new insights on home sharing, and potential future home sharing opportunities.

Additional Service:

Online Database Support (Silvernest, Craigslist, Senior Home Shares) (1 Hour)- Some Home Providers choose to also online room sharing websites, as a way to increase traffic to their home and find a roommate. If a Home Seeker or Home Provider in our program finds a potential candidate, we can have that person go through our vetting process (social service intake, references, background check), as well as support the match through the home sharing process (Trial Match, Living Together Contract, Quarterly Meetings, Mediation, Exit Plan).



Liability Waiver and Release

I acknowledge and agree that:

- (1) While Sunshine Home Share Colorado ("Sunshine") helps facilitate the process of identifying and matching appropriate home share match candidates, all decisions on the selection, acceptance, and/or rejection of a home sharing arrangement and/or candidate are made solely by me, based on my own preferences and criteria;
- (2) I may be introduced to other potential candidates, but neither Sunshine nor any of its officers, directors, agents, or employees make any representations or warranties to me about any home sharing match candidate, or the candidate's ability to perform his/her obligations under a home sharing arrangement; and
- (3) Participation in Sunshine's home sharing program is completely voluntary.

To the fullest extent permitted by law, I, for myself, my minor children (if any), and our heirs, executors, and administrators, hereby irrevocably and unconditionally release and forever discharge Sunshine Home Share Colorado, its officers, directors, employees, and agents from any and all claims, liabilities, losses, damages, expenses, or causes of action, whether known or unknown and whether at law or in equity, arising from, out of, or in connection with the any home sharing arrangement and any other services or support provided to me during my participation in the home sharing program ("Claims"). I agree to refrain from directly or indirectly asserting any claim or demand, or commencing, instituting or causing to be commenced, any proceeding of any kind or nature against any person or entity released by this agreement that may arise from or may be based upon any matter purported to be released by this agreement. I further agree that Sunshine is not now and shall not in the future be obligated to supply financial support for the Home Owner or Home Seeker, which financial support is and shall remain the exclusive responsibility of the Home Owner and the Home Seeker, respectively.

By signing my name and the date, I confirm that I understand and agree to the terms of this Liability Waiver and Release agreement.

Applicant Signature: _____ Date: _____



COVID Client Safety Protocol Response

Sunshine Home Share Colorado takes the safety of our clients and program participants very seriously and adheres to the CDC guidelines. Clients will be required to wear PPE including masks when meetings with Sunshine home share personnel during the current health crisis. Clients who refuse to adhere to agency safety protocol will not be served. Our organization is using robust health screening, cleaning/disinfecting protocols. However, following these guidelines and protocols does not guarantee 100% safety with respect to the corona virus. If you chose to receive client services with Sunshine home share personnel, you are assuming the risk of potentially being exposed to corona virus.

By signing my name and the date, I confirm that I understand and agree to the terms of this agreement.

Applicant Signature: _____ Date: _____



Program Recommendations

Although not required, Sunshine strongly encourages matches to do the following:

Trial Match

A 2-3 week Trial Match period is HIGHLY recommended prior to the Home Seeker fully moving in or giving up their current housing situation. It is recommended the Home Provider make the Trial Match period FREE of rent as the Home Seeker may also be paying rent at their current housing location while beginning the Trial Match. It is encouraged that the service exchange provided should not be calculated during this time as well, as both parties are “trying out” this home sharing relationship. The Home Seeker should not move in any personal belongings during the Trial Match, as the Trial Match is not the full move in. The Home Seeker should move in with a “suitcase” full of belongings during the Trial Match.

Colorado Standard Home Share Lease Agreement

Sunshine does NOT provide a lease but can support the Home Seeker and Home Provider utilizing a lease agreement in conjunction with the Living Together Contract provided by Sunshine Home Share Colorado. A template can be found at the Housing Connects website which we are happy to provide you if you do not have access to a computer/the internet.

Collecting a Deposit

Not all home seekers will financially be in a situation to pay first month rent and a deposit. We encourage flexibility in Home Provider’s decision and how much to collect as a deposit, but this decision is yours as the home provider.

Locked Doors for Personal Spaces

We recommend you allow the home seeker to have a lock on their door. They may or may not choose to use it, but it is their personal space.

Home Owner Insurance/ Renter Insurance

It is recommended you talk to your insurance agent to discuss liability coverage and make sure your home insurance coverage is sufficient for covering a home sharing situation.

Your Benefits

Please be aware that charging rent for space in your home is considered income. If you are receiving any kind of public benefits (SNAP, Medicare Savings, Medicaid) an increase in income may impact your benefits. This is something to consider when thinking about home sharing.



Tenant/Landlord Rights

Be familiar with your rights as a tenant and a landlord. See information provided by the Department of Local Affairs to get more information on this topic

Have a File for Life on the Refrigerator

It is recommended that you place a copy of all your medical conditions and medications in a labeled envelope, in a highly visible location on the refrigerator so it is easily accessible in the case of an emergency. Sunshine Home Share has this form for you.

Emergency Information

It is recommended that you exchange emergency contact information with your home seeker / home provider so they can contact your loved one in an emergency situation.

Personal Finances

Please keep all of your financial information private. For your safety use caution with sharing any information that may be related to your private finances and identity. If you are in need of bill paying assistance, please let us know and we can connect you with nonprofit agencies that work with these programs.



Questions to Ask a Potential Home Share Candidate

- What is your definition of clean?
- Why are you considering home sharing and are you looking for company/companionship?
- What are your biggest home sharing pet peeves?
- Tell me about a past home sharing experience?
- How do you feel about sharing food, chores, car?
- What does a typical day look like?
- What's your communication style?
- What do/did you do for a living?
- Do you expect to have any overnight guests?
- How would you like to handle food and meals?
- Are you generally sociable and friendly?
- Do you have potential health considerations and challenges, including mental health?



Sample Trial Match Document

This agreement recognizes Home Provider _____ Home Seeker _____ are entering into a trial match on (date) _____ at _____ (location) and will last (number of days) _____. At this time, the Home Seeker agrees to only bring enough items for a short stay with the goal of evaluating the potential for a future long term home sharing relationship.

Should the Home Provider and Home Seeker decide to become housemates at the end of the trial match, Sunshine Home Share Colorado will help establish a Living Together Contract. This agreement will specify the expectations and agreement of the home sharing relationship.

At the trial match it is expected that the Home Seeker will be respectful and leave the home in the same condition as found and agree leave at the end of the trial match.

Release of Liability

The parties acknowledge that they have been introduced to one another by the Sunshine Home Share Colorado staff but neither Sunshine or any of its officers, directors, or agents, or employees have made any representations of warranties about any party hereto to the other, or any parties ability to perform his/her obligation hereunder to the other. The parties acknowledge that the Home Sharing Program is a voluntary arrangement entered into between them for the mutual benefit and will require augment and cooperation between them to be successful.

Further, the parties acknowledge that all decisions in this selection, acceptance, and / or rejection of the home sharing arrangement and/or candidate(s) were made solely by the parties based on their own preferences and criteria and Sunshine has no part in such decisions. The parties are requested to consult with the Home Sharing staff of Sunshine Home Share Colorado regarding their satisfaction with the program, and to report any difficulties in the living arrangement to the Home Sharing staff.

The parties and each of them, for themselves, their heirs, executors and administrators, forever release Sunshine Home Share Colorado, it's officers, directors, employees, and agents from any and all actions, causes of actions, claims, damages, losses, or expenses arising from, out of, or in connection with the living arrangements, and otter series provided for herein, or their participation in the Home Sharing Program and each of them agrees Sunshine is not obligated to supply financial support for the Home Provider or Home Seeker, which support remains the exclusive responsibility for the Home Provider and Home Seeker.



The Match

Sample Living Together Contract

The Home Sharing Agreement has important legal consequences. Please read fully and carefully. This document outlines the Home Sharing Agreement between _____ (Home Provider) and _____ (Home Seeker) for _____ (location) on _____ (date).

Factual Background

Home Seeker has a need for and desires to obtain and arrange for private living accommodations and other services in a private residence. Home Provider desires and is willing to provide living accommodations and other services in his/her home. Home Seekers and Home Providers have been introduced to each other through Sunshine Home Share Colorado.

Home Seeker and Home Provider have fully and truthfully disclosed to the other every condition, circumstance and fact that might affect the arrangement they are about to enter with each other. Each understands that the relationship that they will voluntarily enter into by signing the Agreement is based on cooperation, trust, and patience.

Agreement

Now, therefore in consideration of the premises and the mutual covenants and agreements here in contained, the sufficiency of which is hereby acknowledged, the Home Provider agrees to provide the Home Seeker and the Home Seeker agrees to accept, the private living accommodations and other service in the Home Providers home for the term and on the conditions hereinafter provided.

Restrictions

Space

The following areas of the residence or items of personal property owned by the Home Provider are not to be shared or are to be shared only as specified.

The following items of personal property owned by the Home Seeker are not to be shared or are to be shared only as specified.



Items to Move Into the Home:

Home Seeker will be bringing to the home:

Behaviors

The following restrictions apply to the use of the home and includes agreements concerning:

Pets (allowed/not allowed/help with pets in the home/cleaning up after the pet, changing litter box)

Smoking (allowed/not allowed/ if so, where)

Alcohol Consumption (allowed/not allowed) Define moderation or comfort level.

Marijuana (allowed/not allowed/ if so where)

Guests (whom, length of stay, where in home able to stay, overnight guests vs. visitors)

Noise/Television (quiet time) The Home Provider and Home Seeker each agree to refrain from excessive noise or other activities that disturb the peace and quiet of the other.

Kitchen Cleanliness (when need to wash dishes, clean out fridge and food items, wipe down counters, sweep floors, what items can Home Seeker leave on the counter)

Kitchen Usage Times

Purchasing of Food



Trash

House Phone Usage (long distance, late night calls, local calls)

Internet Usage (downloading/streaming/if home does not have WIFI, if home seeker can purchase)

Utilities (water, gas, and electricity) - shall be paid by the Home Provider unless otherwise discussed (including additional costs accrued for air conditioning, water use etc.)

Laundry (usage/ number of loads/week)

Bathroom (if shared – purchasing of bathroom products/cleaning)

The Home Provider can change the rules and restrictions affecting the Home Seeker's occupancy of the home if the changed rule does not conflict with any other terms in this Agreement and the change must be discussed with the Home Seeker prior to the change.

Service Exchange

Please discuss how the following services (be specific and include frequency) will be provided. The parties can agree to modify the terms of this paragraph in writing; this change shall be effective as of the first day of the month

Meal preparation: ☐ Breakfast ☐ Lunch ☐ Dinner

Housework

Gardening



Driving

Errands

Laundry

Grocery shopping

Snow shoveling

Companionship

House maintenance

Other

Rental Exchange Guidelines

Rent Price

Date to be Paid

Delivery Method

The Home Seeker shall cooperate with the Home Provider to keep the home clean and sanitary condition. The Home Seeker shall be liable to any damage to the Home Provider, his/ her family, home or property caused by and shall pay for any repairs made necessary by, the willful or negligent actions or omissions of the Home Seeker and his/her visitors. The Home Seeker shall not make any alternations, additions, or improvements to the home without the prior written consent of the Home Provider, which such consent may be withheld for any reason.



In any case, the Home Seeker and Home Provider understand that even with the installation of any improvements or alterations to the residence, all of which shall be made at the Home Seeker cost, that the term of the Agreement shall not be altered and shall remain a month to month term. Upon the termination or expiration of this agreement, the Home Seeker shall deliver possession of the private bedroom in the same condition as the commencement date, normal wear and tear excepted.

The Home Provider shall maintain the home in decent and safe condition, and with the cooperation of the Home seeker, shall keep the home in clean and sanitary condition. The Home Provider shall be liable for any damage to the Home Seeker or his/her property caused by and shall make or pay for any repairs made necessary by, the willful or negligent acts of omission of the Home Provider and his/her visitors. If the Home seeker remains in the home, the Home provider agree to provide the services set forth above, subject to modification as provided in that paragraph.

The Home Sharing Agreement may not be terminated, unless and until best efforts have been made to resolve any problems that arise between the Home Seeker and Home Provider.

(Home Provider)

Date

(Home Seeker)

Date



Program Fees

All participants are required to pay a \$50 application fee to cover the basic cost of the background and credit check. This fee will be collected if/when the matching process begins.

As a non-profit organization that relies heavily on contributions, we ask that our Home Providers who benefit from our services help contribute back toward them. If we are successful in finding you a match, we ask for a sliding scale fee based on your yearly income.

If your Income is:	Your Fee will be:
Less than \$15,000	\$10
\$15,000-\$25,000	\$50
\$26,000-\$40,000	\$200
\$41,000-\$55,000	\$400
\$56,000-\$75,000	\$600
\$75,000+	\$800

All fees are non-refundable. If your match should end unexpectedly within the first three months, your paid match fee will be credited in full toward your next match.

No one is denied services because they cannot afford our fees. Fees can be reduced or waived in cases of hardship. If fees are an obstacle for you, please notify Sunshine Home Share Colorado.



Communication and Conflict Resolution

Open communication and the ability to resolve conflict is crucial to a successful home sharing relationship. Here are some suggestions for good communication in a home sharing match:

Be clear from the beginning.

It's unrealistic to expect your housemate to read your mind, communicating what you need is one of the best ways to prevent conflict. Clearly express the challenge as you see it, without blaming, accusing, or being defensive.

Approach is important.

Approaching a tough conversation in a calm, understanding, and open manner can have an impact on the response you get from your roommate. Emotions will and can run high in a home sharing match, but the tone that you set when approaching a tough conversation can have a huge effect on the way your roommate approaches your concerns/challenges.

Address things when they're small.

Addressing things that bug you while they're still small can help your roommate be aware of something they may not otherwise know. Addressing little things is much easier than addressing them after they've become big issues.

Be open to new things.

Your housemate may be from some place you've never heard of before or may have a completely different religion, cultural background, or lifestyle from your own. Be open to new ideas and experiences.

Be open to change.

Be comfortable addressing things that unexpectedly come up. Be open to setting new rules and flexible with your changing environment.

Address things when they're big.

If something becomes a big problem, address it quickly so it doesn't become worse. Try on some new shoes. Before making assumptions, try to step back and think about what your housemate's perspective may be in a situation. Then ask your housemate and LISTEN. You may not agree but it will help to open your mind to different opinions and experiences.

Listen.

Listening carefully to what our housemate is saying is crucial to being able to see their perspective. To clarify what the other person is telling you, try paraphrasing. Paraphrasing helps you clarify what the other person is saying, "It sounds like you are saying/ thinking/feeling this _____."



They will either confirm that's what they are saying or correct you. It's a good way to make sure your interpretation of what they are saying is actually what they mean.

Assume your housemate is doing their best.

Finding the good and humanity in your housemate is important, as they should do with you. People don't always communicate or act in ways that align with who they are, remembering that they are trying their best and learning to live in a new situation is important to find the good in each other.

Compromise.

If it seems that you and your housemate have different ideas on the best solution to a challenge, try offering a compromise that meets both your needs.

Communicating with "I" Statements

An "I" message or "I" statement is a style of communication that focuses on the feelings or beliefs of the speaker rather than thoughts and characteristics that the speaker attributes to the listener. "I" statements enable speakers to be assertive without making accusations, which can often make listeners feel defensive. An "I" statement can help a person become aware of problematic behavior and generally forces the speaker to take responsibility for his or her own thoughts and feelings rather than attributing them—sometimes falsely or unfairly—to someone else.

I feel _____ when you _____. Would you be willing to _____.

Examples:

I feel **worried** when you **go out without telling me what time you will be home**. Would you be willing to **leave me a note or let me know if you'll be home that night?**

I feel **frustrated** when you **leave the laundry in the washing machine after it's finished washing**. Would you be willing to **take it out and dry it the same day you put it in?**



Tips for Living Together Well

Living with someone else will always have its ups and downs, and it may take a while to adjust to someone new, especially if you're accustomed to living alone or only with family. These are things you can do to ensure a smooth and successful home sharing arrangement.

- Check in regularly with your home sharer. To do this, you might eat a meal together once a week or plan a weekly activity. Weekly check-ins are a good way for both of you to make sure things are going well and also to bring up any challenges.
- Review your Home Sharing Agreement periodically to see if anything has changed. As in all relationships, disagreements and problems may arise from time to time.
- Be friendly without expecting to be best friends. Successful home sharing relationships are not dependent on friendship. While a great friendship may or may not develop, be careful not to expect that you are going to be best friends. Expecting or depending on it sets both of you up for misunderstanding or disappointment. You should be friendly with your housemate but also make sure you have your own social circles.
- Be aware of who you invite into your room or the home, and how often. You may love having guests, but your housemate may not. Be mindful of how often or when you bring people over. Good communication between the Home Seeker and Home Provider regarding guests is important.
- Lock the door and windows. This may seem like it has nothing to do with housemate relationships, but locking the doors and windows is a critical part of staying safe.
- Respect your housemate's belongings. Talk through what is okay to share or borrow, and what is off limits. Also talk about how often it's okay to use something - borrowing something once in awhile is different than every day.
- Use a communal calendar. We recommend you use a communal calendar that hangs in a shared location. Let the other person know when you will be gone and when you will be back so they don't worry.
- Schedule weekly check-in meetings. A weekly check-in scheduled on the community calendar is a great way to talk about what is going well, what needs changed and is an opportunity to discuss any issues that have come up over the course of the week.



Personal Boundaries

Personal boundaries are guidelines, rules or limits that a person creates to identify reasonable, safe and permissible ways for other people to behave towards them and how they will respond when someone passes those limits. They are built out of a mix of conclusions, beliefs, opinions, attitudes, past experiences and social learning.

When someone feels their boundaries have been crossed, this can lead to feelings of anger or frustration. It is important to recognize your own boundaries and have open communication when addressing boundary issues.

Steps for Conflict Resolution

We know that sometimes difficulties can happen. We want to support your match to help mitigate situations as they arise.

If you and your house mate are having difficulties, we ask you take the following steps.

1. Sit down together and try to talk it through. Identify if the issues are resolvable or if they require more support. At the time of matching you completed steps for how to deal with conflict. Please refer to your Living Together Contract and see if you can work it out using your strategies.
2. Call the agency. We would be happy to come to your home or talk with you on the phone.
3. Professional Mediation services are available. Sunshine works with a nonprofit mediation organization who can provide outside support and help with professional mediation services.
4. Create a move out plan. If your home sharing match does not work out, a reasonable move out strategy should be created. Sunshine staff can provide a list of resources.

On-Going Support

Sunshine Home Share staff will provide ongoing support for the first year of the match and can provide additional support when necessary, including mediation and negotiation.



If you have any questions or would like more information, please call us at

[\(303\) 915-8264](tel:(303)915-8264)

email us at

alison@sunshinehomeshare.org

or visit our website

sunshinehomeshare.org

SUNSHINE HOME SHARE MATCHING PROCESS



Home Sharing is a thoughtful process that takes an average 18-22 hours of staff time to support making safe, careful matches.

We charge a fee to the home provider on a sliding fee scale at the time of matching to help cover some of the matching process cost. If a client participates in our program, they have the opportunity to receive the following services and support in the matching process from staff, who specialize in geriatric social work and care management.

Social Service Intake (2 Hours)- Staff will conduct an intake with every participant asking questions about personality, mental health, hobbies, home logistics, service needs, etc. to screen and better match you with a potential Home Provider or Home Seeker.

References Checked (1 Hour)- Every applicant must have three verifiable references. Staff will contact all references.

Background and Credit Check (0.15 Hours)- Background, DMV, and Credit Checks are acquired and reviewed by Sunshine staff.

Optional Financial Coaching Session (2 Hours)- Home sharing is an opportunity to develop financial stability and create financial goals. We have a trained staff member who can meet in a one-on-one session with each applicant to support a path to better financial health.

Coordination of Match Meetings (1 Hour)- Sunshine staff will contact both the Home Provider and Home Seeker to set up the first match meeting. Coordinating schedules can take time.



Match Meetings (2-3 Hours Each)- Sunshine staff are present for the first match meeting. This is to ensure safety and to help facilitate the conversation. Home Providers and Home Seekers may conduct multiple match meetings before finding a potential housemate. If the first match meeting is successful you are encouraged to meet 2-3 more times on your own. Insuring you know each other fairly well before moving on.

Additional Steps Cont'd on Back

Trial Match Contract (1 Hour)- Sunshine strongly encourages a 2-week trial match. This is recommended so each party experiences living together before the final move-in. Staff meet at the home to discuss the Trial Match and set length of stay. Participants sign a document stating this is only a trial match for a specified time. During the Trial Match staff check in formally and are available for support.

Home Share Agreement Completed (3 Hours)- If the Trial Match is successful, the Home Provider and Home Seeker work with staff and discuss all the details of living together including service exchange expectations, communication plans, rent, space, limitations, cleanliness, etc. Setting these parameters before move-in defines the expectations for a successful home sharing relationship.

Financial Social Work Session (2 hours) – This is an optional step in the program. At any time participants can meet with our trained Financial Social Worker (FSW) to work on setting goals to improve their financial health and well-being. This is a client driven process that supports financial success.

Phone Check In (.5 Hours)- Sunshine staff check in one to three weeks into the match making sure no additional support is needed. Our staff are available for support as needed throughout the match.

Quarterly Care Management Home Visits (2 Hours)- Staff assist throughout but conduct quarterly check in's (4x/year). This is a discussion of challenges and successes where home seekers and home providers receive support from staff to continue in a healthy match.

Mediation (2 Hours)- If needed, Sunshine staff or an outside mediator will conduct a home visit to facilitate a conversation about the challenges that have arisen to help come to amicable solutions.

Exit Plan (2 Hours)- If and when a match ends, Sunshine staff conduct a home visit discussing the exit plan. This may include final rent payment, date and plan of move out, cleanliness of space, etc.

Additional Service:

Silvernest Support (1 Hour)- Some Home Providers utilize Silvernest.com, an online room sharing website, to increase visibility to their home. If a Home Seeker or Home Provider in our program finds a potential candidate, we can take them through our vetting process to support the match through the home sharing process.

Contact Us:

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