

Increasing Housing and Support Options for Older People

An Evaluation of Homeshare Victoria Pilot Phase I: planning, implementation and the first year of matches

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June 2001

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Executive Summary

1. Homesharing is a concept of intergenerational pairing of older householders who can benefit from help in the home and companionship, with younger people prepared to lend a hand. It was first developed in a formal sense in the US in the 1970s, introduced into the UK in the 90s and first attempted in Australia in the late 90s. A Homeshare Program has been running in New South Wales since January 2000.
2. Homeshare Victoria has been in operation since March 2000 and this document covers program operations over the period March 2000 to May 2001. Overseen by an expert Steering Committee, funded by a number of philanthropic trusts and some government agencies, the Program has been run by a fulltime Co-ordinator with considerable unpaid administrative support by a committee member under the auspices of Mecwa Community Care.
3. The evaluation reported on here has been conducted within a framework of process, impact and outcome success criteria. The report covers an assessment of the program overall, a detailed discussion of the four key program areas: recruitment and assessment; the matching process; living together, and the closure of matches; and a concluding section with suggestions for future action. Overall, the 15 months of Program operations have demonstrated not only the feasibility of the homesharing model in the Australian context, but also the benefits for the older people and for the younger homesharers.
4. A broad based recruitment strategy attracted over 200 inquiries from potential homesharers; 178 telephone and 87 face-to-face interviews resulted in 74 completed assessments. Twelve matches were made, and a pool of 16 people are fully assessed and awaiting matching. The matched householders are both male and female, generally over 80 years of age, and are largely, but not exclusively, from professional or managerial backgrounds. Homesharers are a mixed group; ranging in age from early 20s to 50s. The majority are female, and are either professionals, full time students or disability pensioners. Five of the matches have been in place for three months or longer, four matches have been in place for less than three months, and three matches have been agreed to, the participants are getting to know one another but the homesharer has not yet moved in.
5. The matches have been evaluated as successful in terms of their impact on maintaining the older person's independence and capacity to remain in their own home, and on the enhancement of their quality of life. In particular, householders have been assisted to stay in their own homes by the provision of assistance with a range of domestic tasks, the assurance of a presence in the home particularly at night in case of ill health or accident, and by relieving the anxiety of the householder and their relatives. Quality of life benefits have included a sense of security at night, the development of a feeling of companionship, increased capacity to participate in friendship networks, improved diet and increased capacity to benefit from support services that come into the home. Homesharers too have experienced benefits in terms of housing, financial resources and quality of life improvements.
6. The Program has been implemented in an effective manner with an inbuilt process of review and development. This has involved the development of links with and scrutiny of information from the international homesharing network, a detailed analysis before implementation of the international literature on homesharing, and the appointment of a skilled Co-ordinator to run the Program. There has also been ongoing assessment of data from Program operations, reflection on and incorporation of evaluation findings on a

regular basis through monthly Steering Committee meetings, and a mid-year Planning Day.

7. The experience of the Pilot Phase of the Victorian Homeshare Program has demonstrated the feasibility of homesharing as a model in Australia. However, the feasibility of the model has not yet been demonstrated in a range of diverse settings including lower income areas with fewer homeowners and more home renters or areas with a different socio-economic, cultural and ethnic mix of population. In addition, more work needs to be done to assess the cost effectiveness of homesharing as a potential part of the aged care service system. With few options available to older people wishing to stay in their own home but needing practical and psychosocial support in the home over a 24-hour period, the homeshare model clearly has potential. At a minimum, to be replicable, it is suggested that a homeshare program needs to have

- a receptive area where there are older people with adequate accommodation to offer, where younger people are seeking accommodation that is accessible to employment or education and where sharing is a culturally acceptable practice;
- a supportive organisational base with links to the local aged service system;
- a competent steering committee or group to oversee and support the program;
- a co-ordinator with strong interpersonal skills and a good knowledge of older people, aged care issues and aged care service systems;
- an organisational culture of review and development;
- a sufficient introductory phase to get the program established, and
- adequate resources and staffing levels to ensure program co-ordination and administration.

8. As Homeshare Victoria moves into the phase of program consolidation, there are a number of ways in which it can build on present experience:

- ensure that an on-going cycle of formal and informal planning and review continues to be an integral part of program operations,
- restate the aims and objectives of Homeshare Victoria to reflect the findings of the evaluation and the move into the second Phase of Program consolidation. Thus the aim might be to establish or promote homesharing as an integral part of the aged care service system, with objectives that mirror the existing success criteria,
- set goals in terms of size and scope for future program operations over the next year,
- continue to explore ways of ensuring that there is an adequate resource base to cover administrative as well as program co-ordination roles,
- resolve issues around legal liability and formal agreements, and ensure that all match participants sign formal agreements,
- trial and evaluate ways of enhancing the program for example, by the development of training and/or support structures for homesharers, by exploring the possibility of incorporating respite homesharers into the Program.

9. Action is needed to ensure that the practice wisdom and experience generated during the Pilot Phase is analysed and documented, and thus made transferable. Strategies here could include:

- the completion of a policy and procedure manual and adoption of a process for continual update,
- the articulation and documentation of the skills necessary in co-ordinator and administrator staff roles,
- the articulation and documentation of the staffing, resource and support requirements for a homeshare program of this nature, and
- transfer of the data collection system onto an electronic database to facilitate tracking of program process and to enhance program review and development.

10. Strategies to assist in the assessment of homesharing as a potential option within the age care system could include:

- continuing to research, evaluate and document Homeshare Victoria to develop a solid body of local knowledge on the homesharing model,
- continuing development of links with Australian homesharing programs to extend local knowledge, to promote the extension of homesharing into different settings and to assess feasibility in varied communities,
- approaching an appropriate body such as the Ronald Henderson Foundation or the Centre for Health Program Evaluation to undertake an economic analysis of homesharing, and
- maintaining links with international homeshare networks to ensure Australian initiatives are informed by overseas experience.

SECTION ONE: INTRODUCTION AND OVERVIEW

1: Introduction

2: Homeshare Victoria: The Program

3: The Evaluation Framework and Methods

4: Evaluation Results: An Overview

1. Introduction

Homeshare Victoria (Homeshare Victoria) is an intergenerational scheme for pairing older householders, who could benefit from help in the home and companionship, with younger people prepared to lend a hand in return for free accommodation. This program was established in Victoria early in the year 2000 as a pilot designed to trial the implementation of homesharing and to work towards the long term establishment of homesharing as an integral part of the aged care service system. An evaluation process was put in place in mid 2000 to assess and document the pilot. This paper reports on the results of that evaluation for the period covering March 2000 to May 2001.

1.1 Background to Homesharing

Homesharing is a concept first developed in a formal sense in North America in the 1970s primarily as an approach to preventing older people from being placed in residential care prematurely or unnecessarily, and secondly as a means of providing affordable housing options to younger people. Formal Homeshare Programs now operate in eight countries, with over 100 programs in the US, and several in the UK from 1993 onwards. Whilst there have been several models of Homeshare, the basic underlying philosophy is the same – independence, personal growth and quality of life through reciprocal sharing of resources (Johnson & McAdam 2000).

The first Homeshare Program in this country, the “Aged Care Co-Residency Pilot Program,” was trialled in Gippsland between July 1996 and April 1997 in eastern Victoria, but did not extend beyond the pilot phase. Since 1997, the Melbourne based Jewish Community Services has provided the auspices for a housing project for elderly Jewish people that offers an option (among a range of other options) whereby two people are matched in a shared living arrangement that is essentially a homeshare arrangement. This has not been called a “homeshare” program per se but shares some of the fundamental principles of mutual exchange and mutual benefit, and focuses on the needs of the older person.

In New South Wales, the Benevolent Society has been trialing a homeshare program since January 2001. This program has been recently evaluated and its Steering Committee is currently considering the results. Where possible, these evaluation results are used for comparative purposes in this paper.

1.2 The Report

This paper reports on the evaluation of the implementation of the Homeshare Victoria covering the period from the beginning of March 2000 to the end of May 2001. The evaluation was designed to be both formative and summative in nature, and the paper therefore reports on both process and impact findings. The evaluation has provided data to the Steering Committee and the Homeshare Victoria Co-ordinator over this period to inform and enhance the development and implementation of the Program. Written reports have been provided to the Steering Committee and regular discussion of results has occurred between the evaluator and the Committee. The evaluator has participated in a Program Planning Workshop, and regular discussions have been held between the evaluator and the Program Co-ordinator.

This paper has been written with two audiences in mind. Firstly, it is designed to assist the Homeshare Victoria Steering Committee and Program Co-ordinator in the on-going development of the Program. Secondly, the report documents process and impact findings so as to serve as a source of information to others in Australia (and elsewhere) who may be considering homesharing as an option for supporting and maintaining older people in their own homes.

The report consists of three sections. The first section contains four chapters and introduces the reader to homesharing in general and to the Victorian program in particular, and then gives a summary of the evaluation framework and an overview of the evaluation results in relation to the program as a whole. The second section consists of four chapters. These cover the evaluation results in relation to each of the four key program areas; recruitment and assessment; the matching process; the living together and match closure. The third and final section contains one chapter that summarises the evaluation conclusions and makes suggestions for future action.

2. Homeshare Victoria: the Program

2.1 Program Planning and Development

In November 1998 a group of people who were working in aged services, or who had worked there and were retired, came together to discuss the possibility of introducing homesharing into Victoria. Over the next three months the group expanded to include those listed in

Appendix I. These individuals formed the Steering Committee that has overseen all subsequent developments.

The convenor of the Steering Committee was directly involved in the provision of supported accommodation to older people in Victoria and, having attended a conference presentation about Homesharing UK and having personal experience from her own family of the value of such an arrangement, she had developed a particular interest in homesharing as a support option. In 1999, under the auspices of the fledgling Steering Committee she visited Homeshare UK, and brought back a range of information and resources to assist in the establishment of homesharing in Victoria.

The Committee set out to gather support for the homeshare concept in Victoria and to seek funds to resource the implementation of the pilot. In late 1999, the Steering Committee placed itself under the auspices of Mecwa Community Care, the largest not-for profit community service organisation in Victoria that provides residential and home and community services for older people and people with a disability. This was done in part to facilitate applications for funds from philanthropic trusts and government departments but has proved advantageous in many ways (as discussed later in the report).

By early 2000, funds to the tune of \$95,000 had been granted by a range of government and non-government agencies (see Appendix II). In February of that year, two short-term consultancies were contracted to undertake a formal literature review of Australian and international Homeshare projects and to review options and recommend an operational model for the pilot program.

2.2 Implementation of the Pilot Program

In March 2000 a Co-ordinator was appointed and initiated the implementation of the pilot program for a planned one-year period. Publicity and recruitment began almost immediately, the Victorian Minister for Health officially launched the Program in June, an evaluation consultant was selected in July and the process of recruitment, assessment, introductions, matching and support began to bear fruit with the first match in July.

Throughout this first year of implementation the Steering Committee sought to learn about the issues involved in establishing a homeshare program in Australia and to advocate for the provision of recurrent funding for such a program within the aged care service system, primarily the Home and Community Care Program (HACC). Early in 2001 a project development grant from HACC was received and the pilot was extended to the end of 2001 thus giving a longer timeframe for the findings of the evaluation to be considered and incorporated. This pilot process is summarised below in Figure 1.

Figure 1: Planning, development, implementation and evaluation of the Homeshare Victoria Pilot Program

Pilot Phase I: Developing and piloting a model of service: October 1998 - July 2001

1. November 1998: Formation of the Steering Committee
2. Jan-Dec 1999: Initial planning and information gathering including;
 - Visit to UK Homeshare
 - Negotiation of the relationship with Mecwa as auspice agency
 - Search for funds
3. February 2000: Pilot program planning including;
 - Literature review
 - Review of program models

4. March 2000-June 2001: Pilot program implementation:
 - March 2000 Appointment of the Program Co-ordinator
 - May 2000 Formal launch of the Program
 - July 2000 Appointment of the evaluator
 - August 2000 Adoption of the evaluation framework
 - February 2001 Formal planning and review session
 - June 2001 Receive evaluation report

Pilot Phase II: Consolidating the program model: July 2001 to December 2001

1. Consideration and integration of evaluation findings as appropriate
 2. Resolution of long-term funding and organisational framework
 3. Final development of program manual and program job descriptions
-

2.3 Pilot Program Homesharing Model

The model of Homeshare that was adopted in Victoria closely follows the English model. Briefly, potential participants are recruited via targeted or general publicity. These are *householders*, ie older people offering free accommodation in their own home, and *homesharers*, younger people applying to share with the older person in exchange for some specified assistance of around 10 hours per week, and companionship. Each applicant undergoes a thorough assessment process by the Program Co-ordinator: an initial phone interview followed by a written application form, a face to face interview and home visits, family members, significant friends or personal carers of the householder may be contacted as relevant, and all potential homesharers have to supply three personal referees and agree to a police check. No fees are required from either party.

If an applicant is accepted into the Program, they are placed in a 'pool' and the Co-ordinator undertakes a process of matching to assess compatibility. Potential matches are then discussed with each party separately, a written snapshot of the potential match partner is provided, and, if both agree, an introduction is arranged. The Co-ordinator attends the introduction, a family member of the householder may be present and as well as this being an opportunity to meet and get to know one another, the details of mutual rights and responsibilities are discussed. Should the match then be agreed to, an interim agreement is signed, the homesharer moves in, a trial period of a month begins after which a full formal agreement is signed.

Over the first month the Program Co-ordinator provides fairly intensive telephone and personal support to both parties to assist with the settling in process. The Co-ordinator then maintains occasional contact with the participants and assists them as required for the duration of the match. Should the match end for any reason, the Co-ordinator supports the participants through appropriate closure processes.

The standard format of the agreement covers a wide range of issues including; the provision of accommodation and furniture, arrangements in relation to food and cooking, laundry, smoking and drinking, guests, security, telephone, homesharer's luggage and possessions, utilities, gifts, insurance, acknowledgment of the role of Homeshare Victoria, the voluntary aspect of participation and issues of organisational and personal liability. Specific clauses are inserted in the agreement to suit particular circumstances. These may relate to the number of nights per week or weekends the homesharer is expected to be at home, the type of assistance to be provided such as help with a garden, an animal, small maintenance jobs, computer etc.

2.4 Pilot Program Parameters

The Program operates within the geographic boundaries of the Inner South Region of Melbourne that includes the municipalities of Stonnington, Glen Eira and Port Phillip. These areas have a relatively high proportion of older people and single occupancy housing, and there are good transport links to the city and to nearby centres of tertiary education. Mecwa, the auspice agency, has been operating in the area for many years and members of the Steering Committee had a long association and close knowledge of the area.

Eligible participants are elderly people who require some assistance in their own home but who are able to live independently in their own accommodation. Applications have been received from single and married people between the ages of 40 and 94. There has been no age restriction for potential homesharers and applications have been received from teenagers up to people in their 70s.

Householders effectively need to have a suitable residence to accommodate a homesharer, consisting at a minimum of a spare bedroom. Applications have been received from individuals who are in transitional housing but this does pose some significant difficulties in terms of the timing of matches and the need for homesharers to know where they are going to live. Householders must be able to manage their own personal care needs or have personal care services in place.

Homesharers are expected to commit to homesharing for at least 6 months, provide identification, personal referees and a police check or statutory declaration of no criminal background, and to have no more personal possessions than can be moved into the householder's home.

2.5 Pilot Program Staffing

Homeshare Victoria has been staffed since March 2000 by a full time paid co-ordinator with qualifications in social work and a strong community services management background. Mecwa Community Care has provided practical support in terms of reception, information technology and finance services, but running a one-person show of this nature soon proved onerous. In the absence of sufficient funding for a paid assistant, members of the Steering Committee have provided unpaid operational support to the program. For example, a member of the Committee has acted in the Co-ordinator's position in a voluntary capacity on two occasions so as not to leave the Program unmanaged while the Co-ordinator takes a holiday. Since September 2001 one of the members of the Steering Committee has worked 12 hours a week as a volunteer to assist the Co-ordinator. Her work has included dealing with initial inquiries and conducting preliminary telephone interviews, providing follow-up support to potential homesharers under assessment or in the pool of fully assessed but not yet matched applicants, keeping file notes up to date and attending home visits to potential householders with the Co-ordinator and then participating in discussions around compatibility assessment for introductions and matches.

2.6 Pilot Program Structure and Organisation

Homeshare Victoria as a Program of Mecwa Community Care, works within the overall mission and structure of that organisation. However the Homeshare Steering Committee (that includes a Mecwa representative) works relatively autonomously within this framework. The Program is managed in a day-to-day sense by the Co-ordinator, who works under the direction and with the support of the Steering Committee. Initially Mecwa supplied

office space for the Program Co-ordinator within its head office, however, space restrictions and a lack of privacy for telephone calls and face-to-face interviews led to a shift to the quieter premises of a Mecwa Day Centre in the same suburb.

2.7 Pilot Program Resources

In the early days the Steering Committee worked without funds, until grants were obtained from the organisations noted in Appendix II. These funds are received through and administered by Mecwa Community Care, and the organisation also supplies considerable in-kind support such as office space, reception and telephone answering services, administration and information technology support, access to publicity through agency newsletters, flyers, etc, advice regarding fundraising, insurance and liability from in-house specialists, and the rather intangible but nonetheless vital ingredient, moral support which goes a long way with a new and untried service.

A key aspect of the Program's resources has been the Steering Committee. The Committee has undertaken its role of overall management of the Program with considerable enthusiasm and has also supplied a range of practical support services on a voluntary basis such as a locum service for the Co-ordinator, administrative program support, submission writing, seeking legal advice regarding liability, contracts, and duty of care, taking up a lobbying and advocacy role with non-government and government agencies and key decision makers. The Committee has been an asset to the Program; the continuity of membership, the members' links with the aged care sector, their commitment to homesharing and their energy in pursuing its aims has added significant value to the financial resources.

3. The Evaluation Framework and Methods

In mid 2001, the Steering Committee adopted a framework for the evaluation of the Program. The overall aim and objectives of Homeshare Victoria stand as they were adopted at the launch of the Program, however the success criteria and the process and impact measures have been developed in the light of formative data throughout the year.

3.1 Pilot Program Aim

The aim of the Homeshare Pilot Project is "to introduce the Homeshare concept to Australia in collaboration with existing approved aged care services" (Homeshare Victoria Official Launch: Program 26/6/00).

3.2 Pilot Program Objectives

Four objectives are outlined in the same document.

- To assist elderly people to remain in their own homes if they so choose, living in comfort, security and dignity.
- To empower ordinary people of integrity and good will to provide a high calibre of care, based on a comprehensive understanding of the Householder's needs.
- To foster close inter-generational relationships between the Housesharer and the Householder based on an exchange for mutual benefit.
- To provide an innovative solution to the dilemma of providing a high quality service at low cost.

3.3 Success Criteria and Measurement

Translating this aim and these objectives into success criteria and then developing measures against which to assess achievement has resulted in the framework summarised in Table 1

and described in more detail below. The first step was to articulate success criteria in relation to the Program itself (process), the individuals who are part of it (impact), and the community at large (outcome). Chapter 4 of this report makes an assessment of Homeshare Victoria against these criteria.

The next step was to consider each of the four key areas of Homeshare Victoria's work in the same way, with success criteria, assessment measures (both process and impact) and evaluation strategies being identified. The four key areas being

- the matching process covering recruitment and assessment,
- the matching process of introductions, negotiating the agreement and matches,
- the living together, that is the monitoring and provision of support to the match, and
- the closure being the processes involved in an emergency or standard ending of a match.

An assessment based on this framework is summarised in Section Two of this report.

1. Success in relation to Program processes

The first criterion relates to the way in which the program operates.

- *The establishment of an effectively functioning and reflective Program* that demonstrates its capacity to achieve the Program aim and objectives and meet the success criteria. This criterion is to be operationalised by adopting policies, procedures and protocols that maximise the Program's capacity to meet its aim and objectives; by undertaking appropriate evaluation activities to assess effectiveness; by implementing appropriate documentation to act as a guide to operation and replication.

2. Success in relation to Program impact

Five criteria reflect the impact the program is expected to have on the participant individuals in the medium term.

- *Maintenance of the independence of the older people.* Thus the participating older people will be able to maintain their capacity to remain in their own home and local community, to continue to live life in familiar ways, surrounded by things they cherish.
- *Enhancement of the quality of life of both householders and housesharers.* The participating older people will have reduced loneliness and fears about personal safety and have developed a sense of companionship and security. The participating younger people will also have reduced loneliness, have access to a home-like environment, a means of sharing with and assisting others. Whatever the outcome of a search for a match, both Householder and Housesharer will gain from the experience.
- *Reduction or delayed reliance of older person on family or community support services.* The participating older people will have delayed a move into supported accommodation, or reduced their need to accept care services, or to rely on support from family members.
- *Provision of an alternative housing/support option for older people.* A housing support option will be available to older people who cannot, or do not want either to live alone, to move in with family members or to move into supported accommodation.
- *Provision of an additional housing option for younger people,* ie a housing option will be available to younger people that is affordable, may assist them through a transition

phase in their life and be more homely and companionable than living alone. This option will provide aspects not available in shared accommodation with contemporaries, including opportunities to enjoy the company of older people, a home-like environment, an opportunity for inter-generational communication, etc.

3. Success in relation to Program outcome

Finally, the framework articulates success criteria in relation to the community as a whole. Whilst these criteria are seen as an important backdrop to the Homeshare Program, they are part of a long-term, rather than a short or medium-term vision. It is rarely within the capacity of a small program such as Homeshare Victoria to assess such success in terms of outcomes. Broad long-term outcomes of this nature tend to be measurable only over a long time frame, and usually involve complex methodologies at considerable expense. Some suggestions are made in Table 1 of what these methods may involve.

- Provision of a *cost effective means of meeting the support needs* of older people.
- A contribution to a *resolution of accommodation shortages* in our community.
- A *reduction in the incidence and impact of isolation, depression and loneliness* in our community.
- A *contribution to community cohesion*.

Table 1: Evaluation framework for assessing Homeshare Victoria Program process, impact and outcome

Criterion of success	Success measured in relation to	Evaluation strategies
1. Establishment of an effectively functioning and reflective Program that demonstrates its capacity to achieve the Program aim and objectives and to meet the success criteria	Evidence of <ul style="list-style-type: none"> • development of policies, procedures and protocols in each of the four Program areas • development of articulated success criteria and measures • implementation of data collection processes • analysis of data against success criteria • management & decision making capacity of Steering Committee • annual reflective Program review 	Analysis of <ul style="list-style-type: none"> • the Program policy and procedures manual • the Program evaluation document • the operations of the Steering Committee Incorporation of the above into an annual Program review and reflection process, that involves the Steering Committee and the Program Co-ordinator, and opportunities for Homeshare Victoria participants to make an input
2. Maintenance of the independence of older people	Impact on Householders' capacity to remain in their own home <ul style="list-style-type: none"> • physically • emotionally 	Qualitative and quantitative data from Program records Interviews to tap views of <ul style="list-style-type: none"> • HH and HS • HH family members & significant others • HH home care workers • Homeshare Victoria Co-ordinator
3. Enhancement of the quality of life of both householders and housesharers	Impact on Householders and Housesharers in terms of <ul style="list-style-type: none"> • sense of loneliness/companionship • sense of security/insecurity 	Qualitative and quantitative data from Program records Interviews to tap views of

	<ul style="list-style-type: none"> • sense of personal satisfaction • other quality of life issues • personal experience of assessment processes and outcome of application to the Program. 	<ul style="list-style-type: none"> • HH and HS • HH family members & significant others • HH home care workers • Homeshare Victoria Co-ordinator
4. Reduction or delayed reliance of older people on community support services	<p>Impact on Householders and their family members or significant others in terms of</p> <ul style="list-style-type: none"> • use of community support services generally and • home care services specifically. 	<p>Qualitative and quantitative data from Program records</p> <p>Interviews to tap views of</p> <ul style="list-style-type: none"> • HH and HS • HH family members & significant others • HH home care workers and relevant other service providers, eg GP • Homeshare Victoria Co-ordinator
5. Provision of an alternative housing/support option for older people	<p>Evidence on matches in relation to</p> <ul style="list-style-type: none"> • number of matches achieved • nature of matches • duration of matches • level of support required to sustain match • reason for termination • reactions to closure process by HH 	<p>Qualitative and quantitative data from Program records</p> <p>Exit interviews with HHs that include</p> <ul style="list-style-type: none"> • reflections on experience of the match and the Program • views on reasons for and process of termination • views on the role of the Program in future housing and support plans
6. Provision of an additional housing option for younger people	<p>Evidence on matches in relation to</p> <ul style="list-style-type: none"> • number of matches achieved • nature of the matches achieved • duration of matches • level of support required to sustain match • reason for termination • reaction to closure process by HS 	<p>Qualitative and quantitative data from Program records</p> <p>Exit interviews with HSs that include</p> <ul style="list-style-type: none"> • reflections on experience of the match and the Program • views on reasons for and process of termination • views on the role of the Program in future housing & support plans

Table 1 continued

Criterion of success	Success measured in relation to	Suggested research strategies for assessing outcome
7. Provision of a cost effective means of meeting the support needs of older people	<p>The cost of implementing the Program being less than the cost of</p> <ul style="list-style-type: none"> • home care services • supported accommodation that would otherwise have been incurred by the participants and the community within which they live. 	<p>A randomised control trial of Program participants and randomly selected matched non-participants</p> <p>Detailed assessment before, during and after matches of participant support needs and potential use of services, potentially done by GPs or Aged Care Assessment Teams</p>

		<p>Analysis of data on HH hospital admissions before and after involvement in Homeshare Victoria.</p> <p>Could be illustrated by Homeshare Victoria case study material</p>
8. A contribution to a resolution of accommodation shortages in our community.	The matches significantly improving the number of accommodation options open to younger adults in the community.	<p>A randomised control trial of Program participants and randomly selected matched non-participants</p> <p>Detailed assessment of local housing options and impact of Homeshare Victoria on this</p> <p>Could be illustrated by Homeshare Victoria case study material</p>
9. A reduction in the incidence and impact of isolation, depression and loneliness in our community.	Lower incidence of isolation, loneliness and depression among the Program participants than would have occurred if they had not been Program participants.	<p>A randomised control trial of Program participants and randomly selected matched non-participants</p> <p>Detailed assessment before, during and after matches of participants' mental state</p> <p>Could be illustrated by Homeshare Victoria case study material</p>
10. A contribution to community cohesion	<p>Increased community cohesion in terms of</p> <ul style="list-style-type: none"> • intergenerational sympathy • intergenerational understanding • intergenerational communication. 	<p>A randomised control trial of Program participants and randomly selected matched non-participants</p> <p>Detailed assessment before, during and after matches of intergenerational sympathy, understanding and communication among participants and family members</p> <p>Community based research to gauge "cohesion" before and after implementation of Homeshare Victoria</p> <p>Could be illustrated by Homeshare Victoria case study material</p>

3.4 Evaluation Methods

The methods employed for the process aspects of the evaluation have included:

- attendance at and reports to seven Steering Committee meetings,
- supply and discussion of a report to the program planning day that included an assessment based on the evaluation framework especially the tables contained in Appendix III,
- consultation collectively and individually with members of the Steering Committee,

- in-depth discussions with the Program Co-ordinator,
- scrutiny of all program files and program documentation, and
- establishment, operation and monthly analysis of a program database, that records details about applicants, introductions, matches, monitoring and support.

Methods for assessing the impact of Homeshare Victoria have involved a file based review of the eight matches of less than four months duration by May 2001, and in-depth examination of the three matches of over four months duration. This more detailed examination involved interviews with all parties involved as shown below. A total of 13 interviews and one group discussion were held. The outline of the interview format is given in Appendix III.

- Match 1 - Interviews with the householder, the homesharer, two members of the householder's family and the Program Co-ordinator, and a group discussion with five members of his personal care team.
- Match 2 - Interviews with the householder, the homesharer, one member of the householder's family and the Program Co-ordinator.
- Match 3 - Interviews with the householder, the homesharer, one member of the householder's family and the Program Co-ordinator.

Detailed case studies of the three longer-term matches were written and the implications for program development discussed with the Steering Committee. Brief case studies of all 12 matches are given in chapter 7 of this report.

4. Evaluation Results: An Overview

This chapter gives a summary overview of the work of the Program over the 15-month period of the Pilot Phase 1, followed by a brief assessment of this work against the Program success criteria.

4.1 An Overview of the Pilot Program

The Homeshare Victoria Pilot Program has undertaken a significant amount of work over the fifteen months covered by this evaluation. Active recruitment and publicity strategies have resulted in over 200 inquiries from potential householders and homesharers. Close assessment of these people has resulted in 178 telephone interviews, 87 face-to-face interviews and 74 completed assessments. Twenty-one introductions have been carried out and twelve matches made. One of these is a rematch after the closure of a previous six-month match. A further pool of 16 people are fully assessed and awaiting matching.

The matched householders are both male and female though predominantly the latter, generally over 80 years of age, are largely (but not exclusively) from professional or managerial backgrounds, and three quarters of them are full or part pensioners. While most householders own their own home, one is currently in transitional housing and seeking public housing. The older people are diverse in terms of their level of physical and mental dependence or independence (Jaffe & Howe 1988): several are physically frail but mentally alert, others are physically fit but mentally frail, others are relatively active and mentally alert but suffer from anxiety or some physical limitation. Homesharers are a mixed group: four are in their 20s, four in their 30s, one in her 40s and three in their 50s. The majority are female, five are in full time professional work, five are full time students and two are disability support pensioners.

The duration of the matches is varied. By the end of May two matches had been in place for more than 9 months. One match had recently closed after 6 months and the householder is now rematched. Two matches are between 3 and 6 months duration, four matches are of less than 3 months and three matches have been agreed to; one awaits rehousing and two moves are imminent.

Comparing this situation with other homeshare programs is a difficult process. On the one hand, programs have very different scope and resources, on the other hand, the international literature rarely provides sufficient detail for meaningful comparisons to be made. However, in a broad sense it seems that, in programs of similar size, approximately 10 matches per year seem to be the norm with lower numbers in the first year as many programs develop slowly in the start up phase. (Peace & Nusberg 1985, Jaffe & Howe 1988, Jaffe 1989, Thornton 1995).

In Australia, the Gippsland Program operated for nine months and achieved only one match (Dodd 1999). Over 14 months, the NSW Program (Brian Elton & Associates 2001) achieved 14 matches with 12 householders and 14 homesharers, ie there were two rematches. Two matches were of seven months duration, 4 were between three and six months, 6 were of less than three months duration and 2 were yet to commence. The Elton evaluation assessed matches as “successful” if they lasted longer than two months and provided benefits to both parties. On this basis, the NSW Program with more resources and two staff members achieved eight successful matches, three unsuccessful matches and three too recent to assess. Using the same basis, the Victorian Homeshare Program resulted in seven successful matches and four too recent to assess.

Table 2: Summary of Core Program Work: March 2000 to May 2001

	Householders	Homesharers
Total inquiries from all potential homesharers	75	131
Completed telephone interviews	62	116
Completed face-to-face interviews	43	44
Completed assessments	40	34
Applications still being assessed	6	15
Applicant withdrew after assessment	17	13
<i>To enter supported accommodation</i>	<i>6</i>	
<i>For other reasons</i>	<i>11</i>	
Applicant not accepted as homesharer	3	2
Introductions made (21 in total) involving	17 individual HHs	18 individual HSs
Matches made and homesharer moved in	9	9
Match made but homesharer not yet moved in	3	3
Applicants fully assessed and awaiting match	10	6
Agreements signed	8	

Agreements discussed but not yet signed	4
Support and monitoring contacts made to existing matches	206

4.2 Assessment of Program Process

The sub-sections below assess progress against the Program success criteria articulated in Table 1.

4.2.1 Establishment of an effective and reflective program

The Program has been implemented in an effective manner with an inbuilt process of review and development as an integral part of program operations. This has involved the development of links with and scrutiny of information from the international homesharing network, a detailed analysis before implementation of the international literature on homesharing, and the appointment of a well-qualified and skilled Co-ordinator to run the Program.

The Steering Committee has played a consistent and involved role with a strong commitment to the concept of homesharing and a good understanding of the issues faced by older people. Members of the Committee have put in a significant amount of expertise and hands-on labour and have actively taken up the role of reflecting on Program progress and undertaking strategic planning for future directions. This has involved ongoing assessment of data from Program operations, reflection on and incorporation of input from the evaluator on a regular basis, regular and detailed meetings of the Steering Committee, and a mid-year Planning Day. The auspice agency, Mecwa Community Care, has also provided a number of valuable in-kind supports that have enhanced the Program and assisted in planning for the future.

Despite the input of both the Steering Committee and Mecwa, the variety of tasks required to establish a new program has placed considerable pressure on the Co-ordinator. She has managed the multiplicity of roles with skill but not without strain at times. These roles have included:

- Core Program work: recruitment, assessment, introductions, matching and ongoing support to homesharers.
- Program administration: developing policies, procedures and documentation for recruitment, assessment, introductions, matching, ongoing support and monitoring; dealing with a range of administrative tasks such as correspondence, filing, finance, information technology requirements, accountability, report writing etc.
- Program marketing and public relations: talks, articles, newsletters, conference papers, dealing with queries from other agencies, students, international and interstate visitors, etc.
- Reporting and accountability tasks: servicing the Steering Committee, responding to funding body queries, liaising with Mecwa etc.
- Promotion of the model of homesharing: to agencies, governments, funders and the development of specific submissions to these bodies.
- Liasing with other homeshare programs in Australia and overseas.
- Reflecting on Homeshare: reflecting on own role and performance, staff appraisal and development, evaluation, program planning and review.

As a result of this situation, the full documentation of all policies and procedures into a manual form has not yet been accomplished. To ensure that the practice wisdom acquired through the Pilot is captured and transferable, the compilation of such a manual needs to be a priority in the next Phase. In an on-going sense, it seems clear that a Program of this nature requires two staff members, one with significant professional and interpersonal skills to manage the core business associated with matching, and one to provide administrative and professional support to the Co-ordinator.

4.3 Assessment of Program Impact

4.3.1 Maintenance of independence of older people

The Program has been successful in this regard, and has made a significant contribution to enabling the older person to retain their independence and in some cases this could even be described as “regaining their independence”. All householders placed great value on being able to stay in their own homes.

I just don't want to leave my own home if I can help it. I hope to see my days out here. I am 90 and you can't go on forever but I'll be much happier and have more peace of mind living here than I would have in any hostel or nursing home. Quite frankly, older people don't want to leave their homes. They can't take their possessions with them, having one's own things around one means a lot you know.

On an emotional and a physical level the presence of another person in the house has made a considerable difference. Because they know there is someone coming home each night and that someone will be sleeping in the house, a number of the older people have maintained or regained the confidence to live in their own home. In some cases, the small tasks that the homesharer does has removed some practical hurdles that have been limiting the older person's capacity to manage at home. In many cases, relatives are relieved of their anxiety about the older person and have thus stopped pressuring the older person to move into supported accommodation.

4.3.2 Enhancement of quality of life

The Program has been an unequivocal success in this regard particularly for householders but also for homesharers. Even where householders did not specify this area as one of concern for them when applying to Homeshare Victoria, they have all found that the arrangement has had a significant impact on their quality of life. Relatives and in one case, personal carers also commented positively on this. Quality of life gains for householders include improved interest in life in general, better sleeping because no longer fearful at night, better eating habits because of sharing food or mealtimes, more contact with friends because of capacity to invite them into the home and have homesharer help to entertain them, learning to use the computer, no longer lonely or afraid, improved physical health as a result of lessened stress, better diet, assistance with household tasks, assistance to keep track of medication so better physical and mental health, and the list goes on.

There are two matches where some qualifications have to be made. In one case, the presence of the homesharer makes a considerable difference to the householder whose anxiety at night was extreme. However, when the homesharer has to be away, for example to visit her parents in the country or do a study camp, the householder's anxiety seems to redouble. Some form of temporary respite is being explored to deal with this situation. In a second instance, where the match closed after 6 months, the homesharer never took up the opportunity to develop a close relationship with the householder and seemed preoccupied

with her own affairs. In this match the older person was assisted to stay in her own home but the quality of life benefits in terms of companionship were relatively limited.

Homesharers too have enjoyed positive benefits in terms of quality of life. The standard of housing for some is higher than they have been accustomed to, they too have benefited from the companionship of another person who greets them at the end of the day and shows an interest in their affairs. Some express a sense of doing something worthwhile and learning a great deal from the wisdom and experience of the older person, others have acquired specific skills or knowledge from their householder, one feels his health is improved by having a regular mealtime each evening which he shares with the householder, others have received assistance with their studies or work problems and surrogate family relationships have assisted a young student to cope with her home-sickness.

There is of course another side to this coin for some homesharers too. Some mention that they have felt a little confined by the expectation of the older person that they will be home at a specific time or on a nightly basis. This feels a little like living at home with your parents for some, some find this feeling lifts as they get to know the older person better, others express the need to keep an eye on the older person's expectations lest they become too dependent and therefore at times demanding.

4.3.3 Reduction or delayed reliance on support services

The indications are that Homeshare Victoria has had some impact in this area, though it is of course difficult to assess impact in terms of what has not happened rather than in terms of what has happened.

To date no homesharer has sought access to personal care services since being matched. One who was receiving some services before the match has cancelled them. One very elderly man, who has a range of HACC services in place, has been described by the carers as better able to benefit from the services because his homesharer's support in the morning means he has more energy. One householder was able to stay in her home while her relatives were on holiday whereas in previous years she had gone into respite supported accommodation while they were away. Another householder was visiting hostels for potential entry after having a bad fall that put him in hospital for several weeks. Since being matched he has had another fall, but was found soon after when the homesharer came home from work. She was able to revive him, bind up his wounds and reassure him. Another homesharer checks that her householder who has mild dementia, has taken her medication each morning and evening, a task previously undertaken by a relative that was proving so onerous that admission to a hostel was imminent.

There are a large number of minor instances like this illustrative of where homesharing provides in-home company and assistance on a consistent and 24 hour basis that existing models of ageing in place cannot provide. The potential for homesharing to fill a gap between short periods of personal care services in the home and full supported accommodation is evident.

4.3.4 Provision of alternative housing option for older people

In a significant number of the matches, the opportunity to homeshare provided an option to the householder that was not otherwise available. Several householders had attempted to find a person to share with them in other ways. Family members had stayed overnight or for short periods, a young student friend of a grandchild had shared (unsuccessfully) for a while,

church networks had been asked to try and find someone. In some cases other agencies had been approached to try and find someone to share the house but none had been able to offer a satisfactory service. The Home and Community Care Program does not provide an equivalent service. Many householders and their relatives expressed a strong reluctance to advertise, citing fears about dealing with responses, selecting someone who would be safe and reliable, finding a way of agreeing to mutual terms and then dealing with any issues that may arise. As one elderly man put it,

I think it is providing a service which is not otherwise available. When I got home from hospital I knew I had to have help in the house and I got on to my church and asked them. They put a thing in the weekly newsletter. I didn't get a response of any sort. It would have been left to me to advertise and that didn't appeal at all. I'd have had to do the advertising etc and not only that, you're opening yourself up to everybody and anybody.

Many relatives, unable to live with the older person and experiencing some anxiety about their wellbeing were pressuring the older person to opt for supported accommodation. Others were struggling to provide assistance to their elderly relative at considerable personal cost and they expressed relief at finding a service that could assist in finding someone to share with the older person, to oversee the selection and introduction, and to provide on-going support. The reputation of Mecwa as an established agency in aged services gave householders and their family some reassurance that the selection procedures and on-going support would be of high quality.

Clearly, the availability of homesharing has, in some instances, had a direct and immediate impact on decisions about the older person moving into permanent or temporary supported accommodation. In other cases it has delayed such entry, and possibly avoided it altogether.

4.3.5 Provision of additional housing option for younger people

The Program has provided excellent accommodation for the homesharers, in many cases of a higher standard that they could otherwise have achieved. Housing and financial considerations were high on the list of motives put forward by prospective homesharers (see Table 6), however, it is apparent that homesharers with this motivation alone are less likely to make good homesharers. A homeshare arrangement is immeasurably enhanced by the homesharer having a motivation that is beyond the purely instrumental, that incorporates some psychosocial aspects. Thus homesharers who, though they may have a need for accommodation or to save money, also have a desire for companionship in a homelike environment, or a wish to spend time with an older person, will give and receive far more from a match. One homesharer expressed this thus:

You really can't be a selfish person and do this. You would have nothing to give, and I'm sure that if you don't give anything you don't get anything back, so you feel pretty barren about the whole thing. Because it's only the giving that feeds back and gives you something as a reward.

4.4 Assessment of Program Outcome

Assessment of longer-term program outcomes is clearly difficult for small-scale innovative community-based programs. However, within these limitations, some brief comments based on the qualitative data from the evaluation can be made about potential outcomes. These comments should be taken to be indicative only and not in any sense definitive.

4.4.1 Provision of a cost effective means of support

There are potentially a number of ways of undertaking an economic analysis of a homeshare program such as the Victorian one (Dobkin 1985). These include

1. a comparison of the costs of providing the program and the benefits achieved by the program,
2. a comparison of the cost of the program against the costs that would otherwise have to be met by the clients or the government, or
3. a comparison of the cost of providing the program with the cost of other similar programs.

Clearly such economic analyses require complex methodologies to be both sensitive and accurate. Should such analyses be required, specialists in the field of economic analysis would need to be involved. However, on a simplistic basis a preliminary attempt is made here to assess Homeshare Victoria in economic terms.

- Approximate cost of providing Homeshare Victoria for 1 year = \$65,000 (*Caveat: an estimate of recurrent costs has been made excluding such non-recurrent costs such as consultancy fees for the literature and program reviews and the evaluation, overseas study tour, formal launch, however, other start up costs such as capital equipment have not been deducted.*) divided by the number of matches made = \$5416 per match
- Approximate cost per week of the 9 matches that are in residence (total of 159 weeks) = \$408 per week. (*Caveat: the number of weeks reflects the time the 9 matches have been in place and does not include the 3 matches agreed to but not yet in place. This amount per week would continually decrease as matches endure over time.*)
- Approximate costs not expended by householders in relation to similar commercial in-house services:
 - ▶ overnight sleep-over = circa \$105 per night / \$735 per week. (*Figure based on average cost of three agencies involved in providing this service on a commercial basis (Mecwa, Silver Circle and Dial an Angel).*)
 - ▶ live-in assistance = circa \$210 per 24 hour period, (\$1470 per week). (*Figure based on average cost of two agencies involved in providing this service on a commercial basis (Silver Circle and Dial an Angel).*)
- Approximate costs not expended by householders in relation to alternative residential costs:
 - 4subsidised aged care facility = up to \$72 per day / \$504 per week plus accommodation bond based on assets (DPS 2000). (*Caveat: this figure is based on the top figure possible in a Commonwealth government subsidised aged care facility. The cost could be as low as \$22 a day / \$154 a week for a pensioner with no other income, or \$38 a day / \$266 a week for a part pensioner. In a non-government subsidised service the cost could be much higher.*)
- Approximate costs not expended by homesharers in relation to alternative residential costs
 - 4Room in shared house in eastern suburbs = \$116 per week (*Caveat: Figure based on rents quoted in Age 19/5/01 for shared houses in the same Eastern suburbs, these may not be of the same high quality as the accommodation offered by householders.*)

These figures need to be viewed with extreme caution. They do not include any assessment of the impact of program establishment costs as opposed to on-going implementation costs. They make no attempt to cost the qualitative impact of homesharing on independence, quality of life, or sense of wellbeing of the householder or of the homesharer. None of the current householders in the Program could in fact afford to pay for any of the sleepover services and no services of this nature are provided on a subsidised basis through the HACC system. The possibility of subsidised respite services through the Department of Veterans Affairs is currently being explored but will only be available to certain householders.

The figures do however, demonstrate the sort of costs that may be involved for individual householders and their families, in attempting to access similar levels of support and benefit. These costs clearly have implications too for government and community agencies. No attempt is made here to assess these, though some suggestions about how to ensure such an assessment does occur at some stage are made in the final chapter of the report.

4.4.2 Contribution to a resolution of accommodation shortages for younger adults

In most cases, the homesharing option has been taken up by younger people in response to a combination of residential, financial and psychosocial goals. Private rental accommodation in Melbourne is expensive and inadequate to meet demand. (Victorian Homelessness Strategy 2001:9) Homeshare Victoria has provided an option not previously available in a systematic and structured form and has thus added to the range of potential accommodation.

4.4.3 Reduction in isolation, loneliness and depression in the community

The evidence of Program impact on the quality of life indicates that the Program is contributing to the reduction of loneliness and depression of the older people and in many instances the younger homesharers too. Isolation too has been decreased for many participants. Older people feel more connected as a result of having a younger person in the house, in one instance the preparedness of the homesharer to cook for dinner parties has enabled the householder to reconnect with his friends whom he saw less often as he could not entertain or go out at night.

I'd say my spirit has been uplifted. I do! Simply because in this last twelve months, I can't get out like I used to. Now I've got somebody who comes home at night, and that has made all the difference. Someone to speak to, to talk about the day, to share a drink and a meal with. It just makes all the difference.

Some of the younger homesharers applied to homeshare because they were lonely and missing their families who live interstate, overseas or in the country. Sharing in a home as opposed to a single or shared flat with other young people gave them a more homely environment and clearly affected their overall sense of wellbeing.

4.4.4 Contribution to community cohesion

Particularly from the point of view of the younger homesharers the Program in every case increased their understanding of and respect for older people and in this sense has contributed to community cohesion. In addition, the families of householders, while expressing some amazement (and at times anxiety) about the desire of a younger person to live with their elderly relative, also commented on the positive nature of this relationship in terms of their faith in other people and the benefits for all concerned.

It's a fantastic idea, a win win situation for the people concerned and the community as a whole, the government and the taxpayer. It also helps build a sense of community.

4.5 Summary

Homeshare Victoria has been successful in establishing itself as a well-run, well-managed, well-regarded program integrated into the local service networks. Matching has been successfully accomplished to the benefit of the householders, their families and the homesharers. There are strong indications that benefits also accrue to the community at large. The Program has fulfilled the aim and objectives set for the pilot phase, and has, to a significant extent, met the success criteria it set for itself.

SECTION TWO: THE KEY PROGRAM AREAS

5: Recruitment and Assessment

6: The Matching Process

7: The Living Together

8: The Match Closure

5. Recruitment and Assessment

5.1 Recruitment

Homeshare Victoria has undertaken a wide range of public relations and networking work over the pilot period. The focus has been very broad particularly in relation to recruiting younger people as homesharers. In many homeshare programs the emphasis in terms of recruiting homesharers has tended to be on students or people on working holidays, but Homeshare Victoria soon decided to move beyond student accommodation services and to advertise through general outlets such as daily newspapers. Recruitment activities have included:

- the periodic publication of a Program newsletter and development of a Program brochure, model workshop presentation and Program summary,
- placing formal advertisements in the Age newspaper,
- liaison with the student organisations of several tertiary institutions including Holmesglen TAFE College, Swinburne University of Technology, Monash and Melbourne Universities,
- submission of stories and news items to various publications including Fifty Plus, the Herald Sun, the Anglican newspaper, local government and Mecwa newsletters etc,
- mailing brochures and Program newsletters to a wide range of government and non-government agencies involved in funding, advocacy, housing provision, aged care, self help etc.

- in-person presentations to various agencies in similar fields; Citizen's Advice Bureaux, Council on the Ageing, senior citizens clubs, Legacy groups, Aged Care Assessment Service, student services, housing networks, etc.

In the 15 months of program operations covered by this evaluation, some 206 potential applicants contacted Homeshare of whom 178 completed a telephone interview and 87 were interviewed face-to-face by the Co-ordinator. Initially, around two thirds of the applicants were potential homesharers but by the time assessments were complete and applicants were ready for matching not only were the overall numbers greatly reduced but the ratio of homesharers to householders had been reduced from 1:2 to approximately 1:1.

Clearly a significant funnelling effect occurs. Over two hundred initial inquiries became, 74 completed assessments, 21 introductions and 12 matches (with 16 currently in the pool awaiting a match). An enormous amount of detailed work is put into careful assessment, some applicants having as many as 10 contacts before withdrawing or being excluded.

Judgement had to be exercised to ensure that the flow of applications remained at a steady but manageable rate. Too much publicity led to a large number of referrals or applications that then slowed down assessment processes. Too little publicity led to a slow down in applications that then slowed down matching processes. Management of the flow (as well as breadth) of work has been a critical issue in an essentially one-person program and mid-way through the pilot it became clear that more assistance was needed. A Steering Committee member henceforth supplied some administrative support on a voluntary basis. The Program too has been able to target advertising more closely, resulting in more appropriate applications with a smaller fallout rate. As the Program became more established word of mouth referrals via existing participants and local aged services became more common. In addition, some specific advertising was attempted to find a homesharer for specific householder.

Given the steep learning curve such an innovative program experiences, assessments have been completed in a relatively timely manner. The average number of weeks from 1st contact to full assessment has been 2 weeks for householders and 5.3 weeks for homesharers. The range in weeks from first contact to full assessment has been <1→7 weeks for householders and 1→16 weeks for homesharers.

The Program set 6-8 weeks as the timeframe for full assessment and this has been achieved for all householders and for 82% of homesharers (see Table 7). Assessment of homesharers includes requests for responses from personal referees and police, and thus is not entirely under the control of the Program.

5.2 Homeshare Applicants

Tables 3 and 4 summarise the characteristics of potential householders and homesharers who contacted Homeshare Victoria over the 15 months.

Table 3: Characteristics of all potential householder contacts with Homeshare Victoria

Age	N=66 *
40s	1

50s	2
60s	5
70s	9
80s	43
90s	6

Gender N=62

Male	18
Female	41
Couple	2
Siblings	1

Cultural background N=62

Anglo-Australian	41
Eastern European Jewish Australian	13
Southern European Australian	3
New Zealand Australian	1
Not known	4

Past occupation or spouse's occupation N=62

Professional	25
Manager	15
White collar	2
Blue collar skilled	1
Not known	19

Area of residence N=62

Caulfield/Balaclava	9
Toorak	6
Malvern/Glen Iris	6
Beach side suburbs	6
Prahran/Sth Yarra/Armadale	5
Glen Waverley	4
Other Eastern suburbs	17
Northern suburbs	4
Far afield	5

Source of information about Homeshare Victoria N=62

Mecwa	10
Do Care	5
Newspaper ad/article	6
HACC service	7
Personal networks	8
Local government	4
TV	2
Miscellaneous	18
Not known	2

Time between 1st contact and full assessment

N=40#

up to 1 week	19
2 weeks	13
3 weeks	1
4 weeks	6
7 weeks	1
Average time =2 weeks	

Source: Data retrieved from the total of 62 telephone interview records

* N=66 because includes two couples and one pair of siblings

N= 40 because only 40 applicants proceeded to full assessment

Clearly, potential householders are elderly, with two thirds over 80 and twice as likely to be female as male, of predominantly Anglo-Australian background with a significant subgroup of Eastern European post-war migrants, and of relatively high socio-economic background as retired professionals or managers. Applicants tended to hear about Homeshare Victoria through personal or service networks.

Potential homesharers (see Table 4) on the other hand, are younger with a third under thirty, a third in their 30s and 40s, and a third over 50. They too were predominantly Anglo-Australian with a significant subgroup of overseas students from all around the world. One third has a professional or managerial background, a quarter is from a white-collar background. Three main groups applied, those in full time work, those studying full or part time, and those who are on a pension. Most heard about Homeshare Victoria through newspaper articles or advertisements or through student services at a tertiary institution.

Table 4: Characteristics of all potential homesharer contacts with Homeshare Victoria

Gender	N=116
Male	45
Female	67
Couple	2
Two young women	1
Woman with child	1
 Cultural background	 N=116
Anglo-Australian	62
Northern European Australian	3
Eastern European Australian	3
Southern European Australian	3
Asian Australian	2
South East Asian countries	8
India/Sri Lanka/Mauritius	6
Germany	1
Slovakia	2
Fiji	1
Africa	1
Other	4
Not known	8
 Residential status	 N=116
Permanent resident	90
Temporary visa	21
Not known	5
 Source of information about Homeshare Victoria	 N=116
Newspaper ad/article	35
Tertiary Institution	18
Mecwa	12
Personal networks	7
Housing service	8

Other HH or HS	6
Do Care	1
TV	8
Miscellaneous	13
Not known	8

Age N=118*

Teens	12
20s	29
30s	25
40s	18
50s	25
60s	5
70s	4

Usual occupation N=116

Professional	34
Manager	5
White collar	30
Blue collar skilled	7
Blue collar unskilled	4
Student	15
Other	4
Not known	167

Current labour market status N=116

Full time work	26
Full time study	36
Part time work	13
Unemployed	12
Retired/on a pension	14
Part time study	5
Other	5
Not known	5

Time from 1st contact to full assessment N=34#

1 week	1
2 weeks	5
3 weeks	5
4 weeks	9
5 weeks	2
6 weeks	3
8 weeks	3
10 weeks	3
16 weeks	2
Not assessable because withdrew & then renewed application	1
Average time	5.3 weeks

Source: Data retrieved from the total of 116 telephone interview records

* N=118 because includes two couples

N= 34 because only 34 applicants proceeded to full assessment

5.3 Applicants' Motivation

A preliminary recording was made of the person's motivation for homesharing as shown in Tables 5 and 6. Householders articulated concerns about safety and security, loneliness and the desire to stay in their own home but needing assistance or company to achieve this. The precipitating factors that led them to approach Homeshare Victoria were largely health related. Homesharers reasons for being interested in homesharing were recorded as a mix of instrumental motives (financial or accommodation) and psychosocial (desire to assist older people, or provide a community service, enjoy company of older people or want a homelike environment).

Table 5: Motivation and precipitating factors behind potential householders' applications N=62

Primary reason for interest in homesharing	
• Concern about safety or security	14
• Desire for companionship	13
• Need for assistance with household tasks	8
• Family pressure/family concerns	7
• Desire to stay in/return to own home	7
• Desire for live-in help	6
• Desire to maintain independence	2
• Other	3
• Not specified	2
Secondary reason for interest in homesharing	
• Concerns about safety or security	16
• Desire for companionship	5
• Need for assistance with household tasks	9
• Family pressure/family concerns	5
• Desire to stay in/return to own home	6
• Desire for live-in help	5
• Desire to maintain independence	4
• Other	1
• Not specified	11
Precipitating factor for application	
• Steady decline in health	15
• Health crisis/hospital admission	17
• Breakdown of existing support	8
• Incapacity or death of spouse/carer	3
• Increasing family concern	4
• No clear cut factor	5
• Other	2
• Not specified or not yet known	8

Source: Data retrieved from the total of 62 telephone interview records

Table 6: Motivation behind potential housesharers' applications N=116

Primary reason for interest in homesharing	
• Desire to assist older people or enjoy the company of older people	28
• Financial benefit	27
• Need for housing	25
• Desire for companionship in a shared or family like environment	16
• Opportunity to provide a community service	6
• Other	4
• Not specified	10
Secondary reason for interest in homesharing	

• Desire to assist older people or enjoy the company of older people	20
• Financial benefit	16
• Desire for companionship in shared or family like environment	13
• Need for housing	10
• Opportunity to provide a community service	4
• Other	1
• Not specified	52

Source: Data retrieved from the total of 116 telephone interview records

5.4 Outcome of Assessments

A fairly high drop out rate exists among both householders and homesharers. Around one in every two inquiring householders and two in every three homesharers drop out before completion of assessment. Withdrawals after assessment also occurred; about half the fully assessed householders and a third of the homesharers withdrew after assessment.

A range of factors affected the drop out rate. Some householders became too frail to proceed, many applicants had a change of heart or made other arrangements after their initial inquiries; for some potential homesharers the timeframe for assessment conflicted with their need for fairly speedy response to their accommodation or financial problems.

A small number of applicants were not accepted into the Program after undergoing assessment (3 householders and 2 homesharers), while a proportion of applicants were discouraged by the Co-ordinator as she assessed very early that they were not suitable for homesharing. In some cases the applicant was outside the Program parameters for various reasons such as area of residence, degree of frailty, unsuitable accommodation on offer, short time available. In other cases the applicant may have had unrealistic expectations of homesharing and were really seeking a replacement spouse, a live-in housekeeper or a nurse, or they had personal characteristics that made them unsuitable (large numbers of pets or possessions, significant personal care needs such as advanced dementia).

5.4.1 Applicants withdrawing before completion of assessment

Homesharer: Offered accommodation elsewhere

In late March Ms M, a middle-aged woman in the process of upgrading her professional qualifications rang Homeshare Victoria. She had found financing her studies on Austudy difficult the previous year, and was now enrolled as an external student at an interstate university. She had some experience in caring for an older person and some work experience in a caring profession, and felt that a homeshare arrangement would be of benefit both in terms of her financial situation and her sense of wanting to support others.

A phone interview was done on the spot, and a face-to-face interview carried out within the next ten days. Her referee reports came back within the next month and were positive about her skills and character. Before the police check request was returned, she rang to say she had been offered a housesit close to the university until October. She decided to take this opportunity up and said she would recontact Homeshare when she returned to Melbourne later in the year.

Some six contacts were made, over a period of 3 months: 4 by phone, 1 face-to-face interview and 1 by mail.

Householder: Failing sight

In March a referral was received for Mrs B, an active healthy 83 year old whose failing eyesight increased her need for support at home, mainly to help in household tasks. She was very keen to maintain her independence and

wanted to explore Homeshare but also wanted to take her time to think about it. She had a booking for respite care in a hostel in three months time so her application was put on hold until after that. While in the hostel she reluctantly came to see that supported accommodation might be her best option. She returned home for three weeks and was confirmed in this view and withdrew her application to Homeshare Victoria.

Some 5 contacts spread over 5 months: 1 mailout, 2 phone calls, and 2 visits were made.

5.4.2 Applicants assessed as unsuitable for homesharing

Homesharer: Queries about motivation and maturity

A 44-year-old man contacted Homeshare Victoria in July after seeing an article in the local paper about homesharing. He had a part time job in the security field and was living in a rooming house. He expressed his interest as "I am dissatisfied with my present living arrangements. The environment is not conducive to a peaceful lifestyle, which is what I am seeking." He felt he could relate well to older people, and he had had some relevant experience through his previous paid and volunteer work.

After the personal interview, the Co-ordinator had some reservations about his maturity and motivation. He seemed rather more concerned with himself, not indicating much warmth or caring for older people and seemed to be edgy and somewhat undirected for a man in his 40s. These concerns were confirmed by comments made in the personal referee reports. The police check revealed a number of convictions indicative of the fact that he had some difficulty in controlling his behaviour. The Co-ordinator felt some concerns about rejecting the applicant as his life history already included many instances of rejection. It was felt that telling him he was not suitable would amount to yet another rejection. Careful thought was put into how best to indicate to him that homeshare would not be an appropriate option for him.

Some 6 contacts were made over the period of a month: 2 telephone calls, 4 mail contacts and 1 face-to-face visit.

Homesharer: Not reliable or mature enough for homesharing

Ms N, a woman in her early 50s, contacted Homeshare after hearing of it through the transitional housing service that was providing her with temporary accommodation. She had worked in aged care for some years but was unable to work because of an injury. Her family was grown up, she was divorced and her children were scattered around the country. Her motivation was "I have worked in aged care for the past six years, I am in need of housing and I enjoy the company of other people – especially older people."

After the personal interview, the Co-ordinator noted that she seemed a caring person, but somewhat erratic and caught up in her own dramas for her age, also that her motivation seemed largely financial. A previous employer, nominated as a referee, spontaneously confirmed these reservations, and a decision was made not to proceed with the application. Again care was taken in planning how best to convey this to the applicant.

Over a period of 4 weeks, 6 contacts were made: 2 telephone, 1 face-to-face, and 3 mail outs.

Householder: Wanting a housekeeper

Mr A wanted a housesharer because he wanted a "qualified person to live in and look after him". This 82 year old man had no family and was finding it increasingly lonely living by himself. However, when visited at home it became clear that what he really wanted was a live-in housekeeper, and that housesharing could be difficult, as he slept in the living room. He also had some disturbing ideas about what the gender and racial background of the housesharer would be. This application was not pursued, after a total of 5 contacts over 2 weeks; 2 phone, 2 visits and 1 mailout.

5.4.3 Applicants withdrawing after assessment

Other program applicants withdrew after assessment. Seventeen of the householders (45%) and 12 of the homesharers (36%) who were fully assessed and accepted into the Program, withdrew before a match could be arranged. Homesharers tended to have a change of circumstances or heart, while householders had a health crisis or their health simply declined to the extent that a move into supported accommodation was precipitated before full assessment or before an introduction could be made.

Homesharer: Offered other accommodation

Ms D rang early in May as she had seen the Homeshare advertisement in the newspaper. She came from a non-English speaking European background and was in Australia on a 2-year working visa and felt she could commit one year to a homeshare arrangement. She enjoyed the company of older people and felt homeshare was "a great way to get in touch with older people, learn from their experiences in life, knowing I can be helpful for others and in my case through a culture exchange".

She had worked as an au pair in Australia and the US and had very positive references from these situations. She was an enthusiastic, mature young woman and was judged to be suitable for homeshare. However, before any introductions could be organised she was offered a place in a house with other young people and accepted this.

Seven contacts were made with this applicant, 3 by phone, 3 by mail and 1 in person.

Homesharer: Decided to buy his own house

Mr N rang Homeshare in early May having seen the advertisement in the Age newspaper. He said he was attracted to the idea because he needed accommodation and he felt "it would be a rewarding experience assisting someone else for whom normal duties can become difficult." He was a young man in his 20s, working in engineering though he had had experience in the past as the night manager of an aged care facility. He related well to older people and had found it a rewarding experience. He described homesharing as something he wanted to do for a year or so while he pulled together the finances to buy a house. He seemed a mature and caring person with a comfortable outgoing nature and a genuine interest in older people. He was fully assessed and then, within three weeks of his first approach, an introduction with a potential householder was arranged but Mr N failed to turn up at the appointed time and did not telephone to explain this. When he was contacted he explained that he had had a change of heart and had decided to buy into a property.

A total of 9 contacts were made over the three weeks, 4 telephone and 4 mail contacts, and one face-to-face interview.

Homesharer: Too busy at work

Ms N rang Homeshare after seeing the advertisement in the Age. In her late thirties, she emigrated to Australia from Asia ten years ago, but most of her large and loving family were still overseas. She worked in a busy profession full time but "I have been thinking to work as a volunteer for older people for a long time. This is an opportunity for me to help them in cooking/preparing meals for them, cleaning the house, take them for walk at the weekend, be their companion as a family."

There was some delay in getting the referee checks returned. Before they were finalised and a couple of months after her initial approach to Homeshare, Ms N expressed some concern about agreeing to move in with someone before getting to know them, and was worried that her job took too much of her time. She was reassured that there would be an extensive introduction process with plenty of opportunity to meet and get to know a potential householder before having to make up her mind.

When all references came in they were extremely positive about her probity and maturity, and the referees all felt she would make an excellent homesharer. However, by this stage nearly four months after her initial application, when Ms N was contacted about a potential introduction, she replied that she felt her work was too all-consuming for such an arrangement and she had moved into a shared household of people her own age in the inner city.

Over the 4 months, there were at least 12 contacts made, 2 face-to-face, 10 telephone or mail contacts.

Householder: Needed supported accommodation

In late May, Mr W's daughter telephoned Homeshare Victoria. Her father was in a rehabilitation hospital recovering from a broken hip. The hospital social worker had mentioned Homeshare as a possibility for her father on discharge from hospital or after a period of convalescence at his daughter's house.

Mr W, aged 89, had been widowed 2 years before after a long and devoted marriage. His health was normally quite good and he was recovering well from the broken hip and walking on a frame. It was reported that he might need a prostate operation in the near future. His daughter felt he could benefit from help with housework, cooking, shopping and gardening and would value some companionship and the sense of security he would get from having someone

in the house overnight. He owned his 3-bedroom unit and could offer a bedroom, separate sitting room and bathroom to the Homesharer. His daughter lived in the same street and had a close relationship with her father. No home support services were in place though some post hospital services could be arranged for a short period to assist with bathing.

The Homeshare Victoria Co-ordinator sent out some information about Homeshare and met with Mr W and his daughter in the hospital a few days later. Mr W was keen on the Homeshare idea and the Homeshare Victoria Co-ordinator visited his house two days later to inspect the premises. Mr W seemed tolerant, easy going and flexible, and prepared to consider a man or a woman, the house was suitable for a Homeshare arrangement, and the family supportive of the idea.

In early June, Mr W was transferred from the rehabilitation hospital to a general hospital for a prostate operation. He was discharged from there to an SRS. By mid-June it was clear that he had settled in well and was hoping to stay. The Homeshare Victoria idea went onto the backburner for a while. In August the Homeshare Victoria Co-ordinator recontacted the daughter who agreed that as her father had settled well into the SRS and was enjoying the security and the company there, he would not be returning home and the Homeshare Victoria possibility was now closed.

Seven contacts were made over a 3-month period; including 4 phone conversations, one face-to-face interview, one house inspection, and a mailout.

Householder: Failing health leading to hospitalisation

In early April a community based agency contacted Homeshare Victoria after a request from a client to find her someone with whom to share her home. Mrs J was 86, frail, had mobility problems and some early dementia. She wanted to stay in her own home but needed some support to do so and was particularly in need of someone to stay overnight. She had recently had a bad experience trying to share her home with a drug taking younger male relative. She had been living in her home for 50 years, had no children or close relatives living nearby but had close relationships with her neighbours. She currently had privately paid for home help, Meals on Wheels and Personal Care HACC Services and some paid assistance with the garden.

The home based interview and house inspection was done over two visits, the house was a little dark and ill-kept with the toilet and laundry outside the back door. Mrs J had a small dog. She wanted help with household tasks and walking the dog. The security of someone sleeping overnight was most important. The Homeshare Co-ordinator was happy to accept Mrs J into the program though it was noted that the property was somewhat below standard. Because of the lack of close relatives, Mrs J's doctor was consulted, he was positive about the prospect of a homeshare, believing that she could manage quite well at home with support, and having someone overnight would be an added security.

In early May, a month after the initial inquiry, the Homeshare Victoria Co-ordinator rang to assure Mrs J that she was still looking for a match for her. However, in late May Mrs J became unwell, and was admitted to hospital. By early June the advice was that she was unlikely to be returning home and so efforts to find her a match ceased.

Some 7 contacts were made including 2 home visits, 4 phone calls and a mailout.

There were a certain number of people who applied to become Homeshare Victoria householders but when they were assessed or when they actually reached the point of introduction, it became clear that they were not suitable for the Homeshare Victoria program. They may have had expectations that could not be met by the Program, they may have had personal characteristics or accommodation that made them unsuitable for a homeshare, or they had such specific requirements in a house sharer that it was unlikely that the Program would be able to find anyone to suit them.

Householder: Wanted a companion

Mrs M rang in early May to inquire about Homeshare Victoria. Her daughter had given her a pamphlet about it and as she was very keen to remain in her home of over 50 years and was becoming increasingly frail, she thought it might be an option for safety reasons. She had already had an unsuccessful boarder arrangement through another agency. Some information was sent out and a week later an interview was held at Mrs M's home.

At 80 Mrs M's health was not good, she had some privately funded home help. A room and main use of a bathroom was on offer in exchange for help with cooking, shopping, housework and watering the garden. She also wanted companionship and some help with entertaining her friends on Sunday nights. She requested a "mature, intelligent woman, very clean and tidy" and specified that tolerance was an important aspect rather than a particular faith or culture.

A number of homesharers were suggested but were all rejected as "too young" and "off too early in the morning" "not home enough during the day". It became clear that Mrs M really wanted an older woman in her 50s who could act as her companion rather than be an independent adult who shared her house. Some discussion was held with Mrs M about this and it was agreed that she would think about it and be recontacted in a few weeks. When this was done, Mrs M said she was feeling much better and "maybe I don't need anybody". She clearly stated she was interested in an older woman who would be at home and would act as a companion. It was pointed out that this was not what Homeshare Victoria was proposing and it was unlikely that such a housesharer would be found. It was agreed that unless the "perfect person" was found there would not be any further contact.

Over 3 months, at least 8 contacts were made including 4 phone calls, 2 home visits and 2 letters.

Householder: Lonely but particular

In late May, Mrs R rang to inquire about Homeshare. She had heard about it from her local community health centre and was considering it as an option because of some health problems she had been having recently. Mrs R was a frail woman in her late 80s; she was born in Eastern Europe and came to Australia just before the Second World War. She had lived in her current house for 18 years and was feeling increasingly isolated as her friends aged, her card circle closed down and opportunities to attend the theatre with friends became fewer. She received some privately funded home support two hours per week, and was applying for Meals on Wheels. She was interested in Homeshare because of some recent health problems, and the concerns these caused her about living alone.

The face-to-face interview revealed that Mrs R as potentially hard to match. The Co-ordinator had some concerns about her suitability for the Program on the basis that she was extremely particular about who she would consider and seemed to want to place considerable restrictions on them. One week after the interview the Co-ordinator had a follow-up telephone discussion with the daughter and raised concerns about her mother's suitability. The daughter concurred and agreed to discuss these concerns with other family members. A week later the daughter reported that the family had organised 7 hours of home care per week in addition to the 2 hours of private home support. The family would see how this went and would ring back to discuss future options. As the family made no further contact, the application therefore lapsed.

The work with this potential householder involved 5 contacts over a period of 4 weeks, including 3 phone calls, 1 home visit and 1 mail out.

5.5 Achievements in Recruitment and Assessment

The Pilot Program has successfully met the success criteria in this key program area (see Table 7). The Program has scrupulously assessed all applicants, followed careful procedures to ensure probity and reliability, and has been skilled, timely and reliable in its approach to potential homesharers.

Since the beginning of the Program, a good deal has been learnt about recruitment and assessment, and processes are more efficient. Drop out rates are likely to decrease as will the amount of work put into assessment of people who then subsequently withdraw. Some withdrawals will always occur, but a good deal of time and effort can be saved if decisions are made early on about applicants most likely to proceed.

Table 7 Success criteria and evaluation of the first key program area: Recruitment and assessment

Criterion of success	Success measured in relation to	Evaluation strategies	Assessment
<p>1.1 Recruitment of a pool of fully assessed potential HHs and HSs</p> <p>1.2 All formal and informal checking processes completed and documented</p> <p>1.3 Assessment done in a timely manner ie completed within 4 to 6 weeks of initial contact with Homeshare Victoria</p> <p>1.4 Maintenance of fully up to date assessments at all times</p> <p>1.5 All participants, whether accepted or not into the Program to be comfortable with the assessment processes and the outcome of assessment.</p>	<p>1. Development of a constant pool of up to 20 individual HHs and HSs assessed and ready for introduction/match.</p> <p>2. All formal and informal assessment procedures completed including</p> <ul style="list-style-type: none"> • telephone interview • written application received • two personal and one police reference received for each HS • house inspection done • significant friends or family members of each HH involved • home care support services involved • face to face interviews done with HHs and HSs • acceptance/non acceptance conveyed verbally <u>and</u> in writing <p>3. All assessments completed and indications of acceptance/non-acceptance given within 4 to 6 weeks</p> <p>1.4 HHs and HSs reactivating an application 6 months after withdrawing from the Program, or 6 months after any contact having been made to be reassessed (whether they had been previously fully assessed or not)</p> <p>1.5 All participants having the view that the assessment processes and outcome resulted in “no harm”</p>	<p>1. Analysis of quantitative and qualitative data from the Program data base including:</p> <ul style="list-style-type: none"> • size of pool • completion of all assessment procedures • timeliness of assessments • level of satisfaction with assessment processes and outcome • update and follow up procedures followed • all lapsed applications fully reassessed 	<p>1.1 Achieved</p> <p>1.2 Achieved up to the final dot point. Not all applicants informed both verbally and in writing.</p> <p>1.3 Achieved for HHs. Not possible to achieve for HSs as reliant on applicants, referees and police to act in a timely manner.</p> <p>1.4 Not yet relevant</p> <p>1.5 Difficult to assess for applicants who withdrew prior to full assessment. Matched HHs and HSs all satisfied and comfortable with assessment processes.</p>

5.6 Insights and Challenges in Recruitment and Assessment

The experience of homeshare programs overseas indicates that many have difficulty in recruitment in the early days (Jaffe & Howe 1988, Jaffe 1989, Thornton 1999), and most experience a high drop out rate. The Gippsland Program had severe difficulties in recruitment, particularly of older people. Homeshare Victoria, in contrast, has established inclusive rather than exclusive eligibility criteria for householders, and has gained considerable experience in recruitment and assessment that has enabled it to adopt much more efficient processes. The geographic area within which Homeshare Victoria is working is a plus, with a number of tertiary institutions, good transport links, and a relatively high proportion of older people living in their own homes.

The importance of a skilled person undertaking detailed assessments in a Program like this needs to be emphasised. Because of the potential vulnerability of both parties to exploitation and even physical danger excellent assessment is vital. Initial inquiries can be screened by a person with fewer skills, but the detailed and often delicate business of discussing motivation, ensuring clarity about what homesharing can involve, confronting misapprehensions, involving concerned friends and relatives, and assessing suitability requires a person with significant skills and experience. These include strong communication skills, insight and understanding of older people, knowledge of theory and practice of aged care and aged service networks, tact and forthrightness, intuition and perception, compassion and commitment to the wellbeing of older people etc. Add to this the need for the Co-ordinator to undertake speaking engagements and to compose written material to publicise the Program and it is clear that a formidable array of skills and experience are necessary. In this regard, Homeshare Victoria has been extremely fortunate in their Co-ordinator.

The placement of Homeshare Victoria within the organisational structure of Mecwa has proved beneficial in many ways, not simply as an auspice body that has the legal framework for receiving funds from trusts and governments, nor as the provider of in-kind resources, but also as an agency of considerable reputation and standing in the community. This latter aspect of the relationship has paved the way for Homeshare in the minds of funders, other service providers and, importantly, with older people and their families as a program they can trust. The relationship has had a positive impact on the capacity of Homeshare Victoria to recruit participants.

Experience to date of recruitment has raised a number of other issues that have presented a challenge to Homeshare Victoria. These have been the subject of some discussion by the Co-ordinator and the Steering Committee and include the following questions:

- Should recruitment be focussed on householders followed by specific recruitment of a homesharer to match an individual older person?
- Is there a place for recruiting temporary homesharers to provide for immediate need by householders or respite arrangements for existing matches?

While the evaluation cannot give conclusive answers to these questions, it is important that the Program continue to explore them over Phase Two and test out the feasibility of attempting these recruitment strategies. Combining breadth in general, with specificity in particular instances may prove to be the optimum approach.

Similarly, a range of issues around assessment has been raised by members of the Committee, as well as by participants in the Program. These include:

- Should homesharers be subject to a check of their financial status as well as the personal references and police check?

- Should householders be subject to the same requirement for three written personal references and a police check?
- Should householders or homesharers pay a fee of any kind?

There are positive and negative aspects to each of these issues and again the evaluation cannot provide definitive answers. Financial checks on potential homesharers may prove to be reassuring to some relatives of older people who remain suspicious or at least tentative about the motivation of homesharers. On the other hand it may prove a disincentive to homesharers who see it as an unwarrantable intrusion on their privacy. Assessment of a householders' personal and moral suitability for homesharing is currently done by virtue of the involvement of concerned relatives, friends, neighbours or relevant health and welfare personnel. Police checks on recipients of other home based services are not required by other aged care services and are therefore not deemed appropriate.

The issue of fee paying is a vexed one. It raises questions around the purpose inherent in fees (full or partial cost recovery, symbolism, a measure of serious intent etc), who should pay them, how much a fee should be, when or how often it should be paid, who should collect fees and what should be done about unpaid fees. The Program is predicated on the principle of mutual exchange and at one level expecting a fee for service seems to go against this. Fees may discourage or discriminate against certain groups of homesharers or householders. Collecting fees may alter or contaminate the relationship of the Co-ordinator with the Program participants. Separation of fee collection from Homeshare Victoria and placement of it within Mecwa may assist with this. A low fee may cost more to collect than it raises. The UK model operates on a fee-paying basis but in a very different environment with an emphasis on short-term arrangements. Replication in the Victorian context is likely to be problematic.

6. The Matching Process: Introductions, Agreements and Matches

6.1 Introductions

To date 21 introductions have been arranged, involving 17 householders and 18 homesharers. Of these, 55.5% have resulted in a match.

6.2 Agreements

Detailed discussions about the form and content of the agreement have been held with all members of the 12 matches, however only eight agreements have been signed. A number of issues have arisen in relation to the signing of agreements between the householder and the homesharers that have been under discussion and review throughout the Pilot period. Using the UK model agreement proved insufficient for legal purposes and currently work is being done to develop a two tiered agreement structure where participants sign a general statement of agreement before the homesharer moves in, which will be followed by a detailed full agreement after the initial one month trial period.

6.3 Matches

After a period of 15 months of operations, where the first few months were largely devoted to setting up the program procedures and undertaking initial publicity and networking, a total of 12 matches have been achieved. Table 8 summarises the nature and duration of these matches.

The Program seems to have been successful in attracting and matching a diverse range of householders. This includes a reasonable gender balance of four men and eight women, as compared to the one man and eleven women in the NSW Program. There is a wide age range from 52 to 95, with the majority in their 80s. Ages were similar in NSW. Several householders are suffering from the early stages of dementia, while others though physically frail are completely on-the-ball mentally. While most householders are of Anglo-Australian background, two women are post-war immigrants from Europe with a range of difficult life experiences behind them. All have a professional or managerial background, most have a certain level of personal assets but a low disposable income. For example all are living in their own homes except for one man who is living in transitional housing. Five are full pensioners (two on Disability Support Pensions, two on Department of Veterans' Affairs (DVA) pensions, and one on the Age Pension), a further four are on part pensions (three on Age Pensions and one DVA Pension) and three have independent means though one of these is eligible for DVA benefits.

Victorian homesharers are also a widely diverse group and are older than the homesharers in the NSW Program. In that Program 5 out of 14 were teenagers, 3 were in their early 20s, 3 in their early 30s and the 3 over 50. In Victoria none were teenagers, 3 in their early 20s, 3 between 29 and 34, one in her 40s and three in their 50s. The majority (10) of Victorian homesharers are female, five are in full time professional work, five are full time students and two are disability pensioners. No data on gender, background or financial status of NSW homesharers are available.

Table 9. Summary of characteristics of matched householders and homesharers: 31st May 2001

Match No.	Suburb of match	Age HH	Gender HH	Age HS	Gender HS	HH or spouse past occupation	HS primary occupation	HH cultural background	HS cultural background	Date of match	Duration of match
1.	Toorak	94	M	34	M	Professional	FT professional work	Anglo-Aus	Chinese Aus	15/7/00	9.5 months
2.	Glen Iris	52	M	51	F	Disability pensioner	Disability Support Pension	Anglo-Aus	Anglo-Aus	27/8/00	9 months
3.	Caulfield#	80	F	29	F	Managerial	FT student	Polish Aus	Japanese	9/11/00	6.25 months match closed 20/5/01
4.	Malvern	88	M	54	F	Professional/Managerial	FT professional work	Anglo-Aus	Anglo-Aus	17/12/00	5.5 months
5.	*	60	M	32	M	Professional	Disability Support Pension & PT white collar work	NZ Aus	Anglo-Aus	Match agreed to 13/2/01	Awaiting accommodation*

6.	Glen Waverley	75	F	24	F	Professional	FT student	French Aus	Anglo-Aus	18/2/01	3.5 months
7.	Hampton	82	F	44	F	Professional	FT professional work	Anglo-Aus	Anglo-Aus	3/3/01	2 months
8.	Caulfield	80	F	32	F	Managerial	Professional	Anglo-Aus	Anglo-Aus	9/3/01	2 months
9.	Malvern	80	F	23	F	Managerial	FT student	Anglo-Aus	Anglo-Aus	16/4/01	1.5 months
10.	Elsternwick	87	F	51	F	Managerial	FT professional work	Anglo-Aus	German Aus	Match agreed to 30/4/01	Move planned for mid-June
11.	Caulfield#	80	F	23	F	Managerial	FT student	Polish-Aus	Mauritania	28/5/01	1 week
12.	South Yarra	86	F	34	F	Professional	FT student	Anglo-Aus	Anglo-Aus	Match agreed to 30/5/01	Trial move planned for early June

This householder is the same as number 11.

* This match is agreed to and the parties meet at least weekly while a housing application is being pursued with the Office of Housing.

6.4 The Pool

As well as the eleven matches that involve 24 individuals, there is also a pool of ten potential householders and six potential homesharers who are fully assessed and waiting a match. Table 10 summarises the characteristics of these 16 individuals. At the end of May there were also six older people under assessment and 15 younger people, many of whom seem to have high potential as participants in homesharing.

Table 9: Summary of characteristics of pool householders and homesharers

Characteristic		Pool Householders N=10	Pool Homesharers N=6
Age			
	20s	-	1
	30s	-	1
	40s	-	-
	50s	-	2
	60s	-	2
	70s	1	-
	80s	7	-
	90s	2	-
Gender			
	Female	7	1
	Male	3	5
Cultural Background			
	Anglo-Aus	9	Anglo-Aus 5
	Italian Aus	1	African 1
Past/Current labour market status			
	Professional	7	FT study 2
	Ran own or other's		PT work & PT study 1

6.5 Timeliness

As can be seen from Table 10 below, the processes of introduction and matching take a certain amount of time but remain timely. Speed is clearly not the principal criterion of success in relation to these processes, nor is a match seen as the only positive result of an introduction. Other factors are of equal importance. It may prove preferable to take longer to introduce highly compatible partners rather than rushing into an unsuitable match that may not last. In certain instances it may be necessary to arrange a number of introductions to allow both parties a chance to assess their requirements in a sharer.

Table 10: Summary of timeframe for introductions and matching of program applicants

	Householders	Homesharers
• Average number of weeks from 1st contact to 1 st introduction	8.9 weeks	9.5 weeks
• Range in weeks from 1 st contact to 1 st introduction	1→32	4→20
• Proportion of the individuals accepted into Homeshare Victoria, offered an introduction within 3 months of 1 st contact#	86.7%	71.4%
• Proportion of introductions resulting in a match@	55.5%	55.5%
• Average number of weeks from 1st contact to match	12.6 weeks	11.4 weeks
• Range in weeks from 1 st contact to moving in	2→38	5→30
• % of moves made in 12 weeks or less from 1 st contact	75%	66.6%

Proportion as per success criterion is 50% see Table 11

@ Proportion as per success criterion is 50% see Table 11

6.6 Achievements in Matching

As a new program, the Homeshare Victoria Pilot Program has been successful in establishing 12 matches in just over one year, and having an active pool of 16 fully assessed and ready to match participants. It has met success criteria in this area except in relation to signing the formal agreement. Homeshare Victoria seems to have attracted a greater proportion of male householders and homesharers than comparable programs and has two male-to-male matches, two matches with male householders and female homesharers, and eight female-to-female matches. While householders are within a comparable age range to those in similar homeshare programs, the homesharers are generally older and more likely to be professional

full time workers rather than younger students. This appears to be the result of both a very broad based advertising strategy and the close assessment of suitability.

Table 11: Success criteria and evaluation of the second key program area: Introductions, agreements and matches

Criterion of success	Success measured in relation to	Evaluation strategies	Assessment
<p>2.1 50% of fully assessed applicants should have an introduction within 3 months</p> <p>2.2 50% of introductions should proceed to a match</p> <p>2.3 Maintenance of an active pool over time</p> <p>2.4 Maintenance of fully up to date assessment of pool members at all times</p> <p>2.5 Mutually agreed upon and comprehensive agreement</p> <ul style="list-style-type: none"> developed signed 	<p>1. 50% of fully assessed applicants to have an introduction within 3 months of full assessment</p> <p>2. 50% of introductions resulting in a match</p> <p>3. All unmatched members of the Homeshare Victoria pool of potential HHs and HSs receiving a letter every 6 months</p> <p>4. HHs and HSs reactivating an application 6 months after withdrawing from the Program, or 6 months after any contact having been made to be reassessed (whether they had been previously fully assessed or not)</p> <p>2.5 Signed agreement for every match that includes statements in relation to:</p> <ul style="list-style-type: none"> provision of accommodation by HH provision of support services by HS daily living issues: luggage and possessions, food, laundry, smoking, drinking, guests, security, telephone & computer use, vehicle use & parking financial arrangements: utilities, insurance non-liability of Homeshare Victoria other issues specific to the individual match 	<p>2.1 to 2.4 Analysis of quantitative and qualitative data from the Program data base including:</p> <ul style="list-style-type: none"> size of pool number of introductions carried out timeframe within which introductions carried out proportion of introductions resulting in a match update and follow up procedures followed <p>2.5 Analysis of all agreements in Program files.</p>	<p>2.1 Achieved: 86.7% of HHs and 71.4% of HSs have an introduction within 3 months.</p> <p>2.2 Achieved: 55.5% of introductions have proceeded to a match</p> <p>3. Achieved.</p> <p>2.4 Not yet relevant</p> <p>2.5 Partially achieved: agreements containing all specified elements discussed with all matches and 8 signed.</p>

6.7 Insights and Challenges in Matching

To reiterate a point made in 5.5.2, the importance of a skilled Co-ordinator in assessing compatibility between potential members of a match should not be underestimated. Compatibility is difficult to pin down or define but may involve elements of any or all of the following: personality, cultural background and/or cultural sensitivity, socio-economic background or social class, intellect and educational background, gender and life stage. The skills inherent in assessing individuals for compatibility are not therefore simple ones, particularly in a homeshare situation where there may be a potential for inequality or exploitation. Matching is a complex process and requires significant insight and interpersonal skills. Preparation and clear expectations are important and the Co-ordinator can play a critical role in this. Prior experience in sharing a home with unrelated or younger people seems to assist in both the development of clearer expectations and acceptance of sharing.

Some discussion has been held at Homeshare Victoria of the potential value of electronic matching; this may have value as an initial sorting tool but can never replace the intuitive role of the Co-ordinator.

Speed is not necessarily of the essence in forming a match, compatibility is more critical and may take somewhat longer to achieve. Placing too much emphasis on achieving a set number of matches may impair quality and ultimately duration of matches.

The auspice of the Program by an established community service agency not only spread knowledge of the Program but also gave many householders and their families confidence in the Program.

Previous homesharing experience (Jaffe 1989) indicates the importance of having a large pool of applicants to draw on when trying to find a suitable partner for a householder. Homeshare Victoria has been successful in recruiting a large number of homesharer applicants, and establishing a much smaller pool of fully assessed and suitable persons. However, it can be difficult to balance the need to have a large pool, with the relatively short time frame most homesharers have. Maintaining the pool at approximately 10 people is probably the optimum number in a program of this size.

A number of issues have arisen during the pilot period relating to the timing, form and content of agreements. Initially the model agreement from the UK program was used, but a number of queries were raised early on. These have included:

- The issue of public liability and where the responsibility lies if the homesharer sustains an injury in the home, given that the relationship of homesharer to householder is not that of employee nor guest nor relative.
- The issue of when agreements should be signed; before moving in, on moving in, after the trial period of a month.
- The issue of the level of liability in relation to duty of care that the Program itself, or Mecwa as the auspice agency, bears towards the participants and the potential issues of liability inherent in the roles of assessment and on going monitoring.

The Steering Committee sought legal advice to clarify these issues. This advice was along the following lines:

- The homesharer should take out personal insurance if concerned about injury or personal damage as a resident of the household and an acknowledgement of the implications of this should be placed in any formal agreement.

- An interim agreement with a summary of terms should be signed before the homesharer moves in, and a more detailed agreement signed after the one-month trial period. The former does not generally differ substantially from the latter but provides for a shorter period of notice during the trial period and gives an opportunity to rediscuss aspects of the mutual responsibilities when the match becomes established. Both documents contain a statement that “the Householder and the Homesharer accept the consequences of not taking out any insurance available to cover their risks arising out of this homeshare arrangement.”
- Both interim and full agreements contain a statement to the effect that “Homeshare Victoria and its management and staff are not to be held responsible for any claims, damages or consequences that may arise under the homesharing arrangement.”

It is a matter of some urgency that all householders and homesharers now sign an appropriate agreement to protect the interests of all parties.

7. The Living Together: Support and Monitoring

7.1 Support and Monitoring

The extent of support and monitoring work in relation to the matches is summarised in Table 12 below.

Table 12: Support and monitoring contacts# to matches July 2000 to May 2001

Match No.	Agreement signed	Contacts in first month	Contacts in first 3 months or part thereof	Contacts in first 6 months
1.	@	12	14	17 (2)®
2.	α	4	6	10 (3)®
3.	α	6	8	19 (10)®
4.	α	5	8	Not yet applicable
5.	α	3	10	Not yet applicable
6.	@	8	19	Not yet applicable
7.	α	7	6*	Not yet applicable
8.	α	8	8*	Not yet applicable
9.	α	9	2*	Not yet applicable
10.	@	2*	Not yet applicable	Not yet applicable
11.	α	1*	Not yet applicable	Not yet applicable
12.	@	2*	Not yet applicable	Not yet applicable

Contacts include phone calls, in-person visits and mail

@ Agreement discussed but not yet signed

* Match not yet in place for the full 1 or 3-month period

® Number in brackets refers to contacts in the time over 6 months

Some matches have required significant input by the Co-ordinator, others have received a simple phone call on an irregular basis and an occasional visit. Generally, the frequency of contacts decreases after the first month with the exception of Match 3 that closed at 6.25 months, and Match 6 where the establishment phase has taken longer to settle down than other matches.

Support and monitoring contacts have served a range of purposes:

- Reassurance and reminder that Homeshare Victoria remains involved, interested and available to assist.
- A sounding board for participants to air concerns or simply ventilate feelings.
- Source of information and advice about additional support or personal care resources that can be put in place.
- Practical assistance to approach appropriate agencies to provide additional support.
- Clarification of expectations and minor dispute settlement about expectations, this may involve relatives as well as participants to the match.
- Re statement of or redrafting of the terms of the agreement.

The Co-ordinator has been skilful in dealing with some challenging issues. Match participants and family members speak highly of her role, she is perceived as professional, approachable and skilled in providing advice and facilitating consensus.

7.2 Case Studies of Matches

The 12 matches are illustrated by brief snapshots. The match numbers reflect the order in which they were formed (see Table 8).

7.2.1 Match 1:

Physically frail but mentally alert Mr W and his family were feeling increasingly uncomfortable about him being alone overnight despite a comprehensive package of personal care services that were in place during the day. Mr W, a retired professional man, has regular contact with his daughters and grandchildren and maintains a lively involvement in his church, with friends and some business interests. Young professional Mr P was moving to Melbourne where he knew few people, had no family and did not want to share with contemporaries as he was “not a party animal”. Both men are highly intelligent, well educated, independent, slightly formal in manner, have a good deal of mutual respect and really enjoy living with one another. Family members have found the match somewhat harder to get used to than the participants themselves. While acknowledging that the match has been a great success for Mr W, in the early stages they queried the equity of the exchange of assistance for free accommodation.

7.2.2 Match 2:

Both householder and homesharer in this match are in their 50s and both suffer from Parkinson’s Disease. Mr F has a resident carer who provides a range of personal care assistance and is paid a carers allowance. Mr F and Ms W met at a Parkinson’s Sufferers support group, and they decided they wanted to try living together for mutual support and companionship. They approached Homeshare Victoria together wanting assistance to set up the match, arrange a formal agreement and receive on-going support. This was provided and the match suits both parties extremely well and has sustained both individuals in living independently that would have been difficult otherwise.

7.2.3 Match 3:

Mrs S is an active and alert 80 year old, but since her husband died she has become nervous about being alone at night especially after one fall and a slight heart attack. Her family were planning an overseas trip and on a previous occasion she had stayed in a hostel while they were away, but had hated it as the other residents were very frail mentally. She wanted an overseas student as she felt she would not have too many possessions and her 2-bedroom apartment was not very large. Ms Y, a young Japanese woman of 29 was in her second year of childcare studies and said she intended returning to Japan in a few months. She expressed

an interest in homesharing because she wanted to work in aged care and felt the experience would be helpful in learning about the needs of older people. The match began in November, and Mrs S soon expressed the view that Ms Y did not fulfil her roles of assistance and companionship, and it became apparent that Ms Y's English comprehension was not as good as had been thought. However, as the family was going on holiday in December, Mrs S was happy to continue until after they returned. In February, despite a number of sessions with the Homeshare Co-ordinator, Ms Y still did not seem to understand completely her role as a homesharer. Mrs S finally spoke to Ms Y directly and soon after was hospitalised with a sore back. These two events seemed to awaken a realisation in Ms Y of Mrs S's frailty and she became more helpful and caring. In March, when the Co-ordinator visited to review the agreement, Ms Y revealed that she had applied for an extension to her visa and Mrs S said she would be happy for her to stay "for the time being". By May however, both Mrs S and her family had decided not to encourage Ms Y to extend her Homeshare arrangement. Mrs S contacted the Co-ordinator and asked her to assist Ms Y in finding alternative accommodation. This was arranged and Ms Y moved out soon after. Mrs S requested another homeshare and was speedily matched (see Match 11) with another student.

7.2.4 Match 4:

Mr B at almost 90 was determined to stay in his own home, but when he had a fall that necessitated a few weeks in hospital he reluctantly began looking at hostels because he felt he needed someone at home over night. A previous experience with a young woman friend of his grand daughter had been a failure as she was out at all hours and Mr B felt he ended up looking after her! A highly capable and intelligent man, Mr B does not suffer fools or his increasing frailty gladly. Ms A is a professional woman in her 50s with grown up children and a busy career. Her rented apartment was to be renovated and she had to move. Some years before, she had been lead tenant in a house with young offenders and felt she would like to undertake a similar role with a perhaps less demanding age group. Both strong minded and forthright, they seem well matched and both speak highly of the other party. Mr B says his life has been transformed and Ms A is clearly gaining a good deal from the relationship and is committed to assisting Mr B to stay at home for the rest of his life.

7.2.5 Match 5:

Mr J was only 60 but had recently suffered a heart attack and had emphysema. He had been a long term St Kilda resident until his rented flat was redeveloped. Some temporary accommodation had ended and he was essentially homeless. After a spell in hospital was living in transitional housing when he approached Homeshare Victoria. He was strongly committed to returning to the St Kilda area. Mr R was in his early 30s and had also had a spell of severe illness and was living on a disability pension in temporary accommodation outside Melbourne. He but wanted to move back to the city. They were introduced in February and agreed they would like to live together. Since then they have been meeting once a week and phoning a couple of times a week, and building a strong friendship. Homeshare Victoria has meanwhile been assisting them to apply to the Office of Housing for suitable housing.

7.2.6 Match 6:

Mrs M is 75, widowed and rapidly becoming frail with early Parkinson's Disease. She has no immediate family but has supportive neighbours and some Home Help. Of European background she has had a varied and at times tragic life and was becoming increasingly anxious and emotional about living alone, particularly being alone at night. Ms F approached Homeshare Victoria with her mother. She lives in rural Victoria, is in her early 20s and

studying in Melbourne. She misses her family a good deal when in the city and wanted a homeshare to assist with costs but also to be in a homelike environment. They met in January and Ms F moved in February when term started. Her course involves study camps and excursions and she also wants to go home at weekends on occasion. Mrs M quickly indicated that she enjoyed Ms F's presence in the house but found her overnight absences very difficult. It emerged that she suffers extreme anxiety, bordering on paranoia about being alone at night and this proved a little difficult for young Ms F to handle. Both parties needed support and assistance to deal with this. Discussions are currently taking place about how to arrange some kind of temporary homesharing arrangement to fill in when Ms F is away.

7.2.7 Match 7:

Mrs L is 82 and is alert but in very poor physical health and felt she needed someone for company and security in the home. Her son was supportive and keen to renovate so as to provide a separate bathroom for the homesharer. Ms C is in her early 40s, working full time and quite involved in sporting commitments, but keen to share with an older person. She is interested in older people, wants company and a homelike environment as well as wanting to save money for her own retirement.

7.2.8 Match 8:

Mrs H is 80 and has early stage dementia and some short-term memory loss. She has lived in her house for over forty years but does not go out much any more. She has an elderly dog with a number of health problems. She has three daughters who are very concerned about their mother, one lives nearby and has been supporting her mother night and morning each day, ensuring she takes her medication and eats properly and remembers to feed the dog and give him his medication. This was proving very demanding and there were increasing concerns about Mrs H being alone at night. A match was made with Ms P. She is 32, and has returned to postgraduate study so is on a low income. She too has a dog and when introductions were made they had to be arranged between dogs as well as owners! The two women settled in to living together extremely well and enjoy one another's company. The dogs too are happy and Mrs H's daughter is delighted. Ms P had an overseas trip booked before the match was made and for a while there was some concern as to how Mrs H would manage without her. Ms P came up with a surprising solution; her mother has moved in and is acting as a temporary homesharer for the six weeks of the trip.

7.2.9 Match 9:

Mrs M is an 80 year-old widow with a number of severe health problems. While her grand daughter is very supportive she is finding it difficult to provide the security at night that Ms M now needs. Ms A is a 23 year old from country Victoria and a new graduate in her first job in the city. She needs to save on accommodation costs but also is missing home and family and wants a homely environment with a garden and more space than a flat. They have been living together now for about 6 weeks, Ms A is described as "part-angel" and is managing the over-anxious behaviour of Mrs M very well. Homeshare Victoria is providing quite a deal of support to both parties in this inevitable settling in phase.

7.2.10 Match 10:

Mrs E is an elderly 87, her adult children live some distance away and are very concerned about her increasing physical frailty. Mrs E has a number of personal care packages including Meals on Wheels, Home Help and some social support. She has had a few falls recently and has not been eating very well. She has a gregarious nature and very sociable with a strong love for animals; she has two dogs and a cat living with her. Ms R is a 51-year-

old single woman working in a demanding professional job whose adult children are completely independent. She has been a regular house-sitter for over ten years and was keen to continue but with more companionship built in. She was an early applicant to Homeshare Victoria in mid-2000. Ms R was initially introduced to two householders several months ago, neither of them were ideal partners for her. She has been happy to wait for the right match. She too is a strong animal lover and when introduced to Mrs E they got on right away. She will be moving in on a trial basis in June.

7.2.11 Match 11:

This match involves Mrs S the householder in Match 3 and Ms N, a young woman from Mauritius who is studying in Melbourne for 3 years. Mrs S contemplated moving into a hostel when her first match ended, but was prepared to consider another overseas student provided a warmer more supportive interpersonal relationship was possible. After one year in Melbourne, Ms N misses her warm extended family and close community terribly and has found living in shared houses with other young students very difficult. An attempt at sharing with an older person had not resulted in the homelike environment and warm companionship for which she yearned. This match with Mrs S, whose first match although at times satisfactory had never been warm, looks like meeting both their needs. Mrs S's family is delighted and is keen to involve Ms N in their extended family activities.

12.Match 12:

Mrs B is an 86-year-old woman who has been widowed for 9 years. Her daughters and grandchildren live some distance away, and were fully supportive of the idea of homesharing. She approached Homeshare Victoria wanting companionship and some assistance with household tasks that were becoming a little difficult for her. She was very keen to stay in her own home with her small dog. She was introduced to Ms I, a single 34-year-old who was returning to study. She felt homesharing would enable her to save money as well as contribute to a household and have some companionship herself. They have met and liked one another very much, both are dog lovers and they quickly decided that Ms I would move in June.

7.3 Achievements in Support and Monitoring

The Program has succeeded in meeting its own success criteria (see Table 13) in terms of supporting matches. Some difficult issues in support and monitoring have been skilfully dealt with. This has involved not only issues that have arisen between members of a match but also issues involving relatives of the householder. The Program has taken on a particularly challenging case where the householder is essentially homeless and living in transitional housing. The Program is currently assisting him in applying for public housing. This has involved a considerable amount of work and would not be sustainable in more than one or two cases at the most.

Table 13: Success criteria and evaluation of the third key program area: The living together

Criterion of success	Success measured in relation to	Evaluation strategies	Assessment
3.1 Adequate, appropriate and documented follow-up and support to HH,	Overall measured in relation to the duration of every match up to or	3.1	3.1

<p>HH family members and HS</p> <ul style="list-style-type: none"> • to maintain the match, • redraft the agreement as necessary and • move toward closure if appropriate 	<p>beyond the original timeframe contracted by the two parties</p> <ul style="list-style-type: none"> • Adequacy and appropriateness of follow-up and support measured in relation to minimum of weekly telephone and one face-to-face follow up sessions in first month and thereafter one phone call per month, and one face-to-face session at six monthly intervals or more frequently if necessary • Documentation assessed in relation to full documentation on HH and HS files. 	<ul style="list-style-type: none"> • Analysis of quantitative data from the Program data base 	<ul style="list-style-type: none"> • Achieved
<p>3.2 Provision of opportunities for HSs to meet for mutual support and role enhancement</p>	<p>3.2 Measured in relation to</p> <ul style="list-style-type: none"> • The provision of at least three formal opportunities per year for HSs to meet for debriefing, socialising and training opportunities • The attendance at these sessions by 50% of HSs • Satisfaction expressed by the HSs at the role and content of these sessions 	<ul style="list-style-type: none"> • Scrutiny of all matched HH and HS Program files <p>3.2</p> <ul style="list-style-type: none"> • Analysis of quantitative data from the Program data base <ul style="list-style-type: none"> • Analysis of quantitative data from the Program data base • Analysis of feedback sheets completed at formal sessions 	<ul style="list-style-type: none"> • Achieved <p>3.2 Sessions under discussion but not yet implemented</p>

7.4 Insights and Challenges in Support and Monitoring

Again Co-ordinator skills are an important ingredient in providing adequate and appropriate support to matches. In addition, balancing the on-going support role with existing matches while working to establish new ones is sufficiently onerous to place a sole staff member under considerable pressure. The evidence of this Program and others suggest that a maximum load for one staff member should be around 20-30 matches, the actual number being dependent on the level of match stability and the extent of match support needs. If matches require a large amount of support and monitoring or are short-term in nature with regular rematching being required, then clearly smaller numbers are feasible. However, this suggested scope is still untested in the Australian environment.

A number of issues have emerged.

- Householders with prior experience of sharing their home with non-family members or much younger family members seem to settle into homesharing well. For both parties, clear expectations and the opportunity to air all concerns, worries etc prior to living together seem to provide a good foundation for the match. The Co-ordinator plays a key role in ensuring this occurs.
- Where dementia or extreme anxiety is present, more support is necessary for the homesharer. Where the homesharer is very young this may increase the need for support.
- Some householders, but more often their relatives, feel concerned about the amount of “work” done as part of the 10 hours. Should companionship be included or should the 10 hours be specific practical tasks. More clarity about what 10 hours assistance actually involves needs to be covered in the agreement.
- Some homesharers contribute far more than the agreement states or the homesharing model implies, and where this can make for a very happy household, concern has been expressed about the potential for problems should the homesharer wish to reduce the commitment at some stage. Such situations may require close monitoring.
- Some householders, and again some relatives, express concern about the way in which the contribution of homesharers to utility bills is calculated. This could be resolved by a flat rate contribution or specific clauses in the agreement that define exact processes for sharing bills.
- Some householders and their families face a problem when the homesharer has to be away over holiday periods or for work or study purposes. A respite or temporary fill-in service would be of great assistance in these cases.
- Some relatives are anxious about the motives of the homesharers. This may emanate from concern about potential exploitation of their elderly relative, but also from feelings of guilt about the fact that a stranger is prepared to take up roles that they, as family members, cannot. While the former may be ameliorated as the Program gains a higher profile and reputation, the latter is likely to endure. Again, skilful and sensitive work by the Co-ordinator can assist all parties to feel comfortable about the homeshare arrangement.
- The success criterion of providing opportunities for homesharers to meet for mutual support and role enhancement has not yet been implemented. The UK Program has tried this, but attendance rates were low. Potentially, homesharers here may see value in such opportunities but this needs to be trialled.

8. Match Closures

8.1 Closing a Match

To date one match (Number 3) has closed after just over 6 months. This match (see 7.2.3) went through various stages. Initially it was difficult, then when evaluation interviews were done with participants at four months it had improved greatly, at a review meeting at five months where the homesharer revealed that she was seeking to renew her student visa, the householder said she was happy for her to stay. However, by six months, which was incidentally the original period for which the match was agreed, the homesharer’s behaviour became more and more distant and the householder finally said she wanted to end the match.

As the wellbeing of the householder was considered paramount and a speedy end to the match was considered in her interests, the homesharer was offered alternative

accommodation by Homeshare Victoria. She accepted the offer but found alternative accommodation before this could take place. An introduction was arranged within a week for the householder, a second match agreed to and has just been put in place.

8.2 Achievements in Match Closure

This area is rather underdeveloped to date and as the first closure only occurred two weeks before the end of the evaluative period, it is difficult to comment beyond the fact that, as with the other key program areas, the development of policy and procedures has tended to occur in response to actual situations. As such the success criteria relating to policy and procedure have not yet been achieved (see Table 14).

Table 14: Success criteria and evaluation of the fourth key program area: The closure

Criterion of Success	Success Measured in Relation to	Evaluation Strategies	Assessment
4.1 Development of emergency and standard closure policy & procedures	4.1 Statement of emergency and standard closure policy and procedures in the Homeshare Victoria Policy and Procedures Manual	4.1 Scrutiny of Homeshare Victoria Policy and Procedures Manual	4.1 Not achieved.
4.2 Formal closure procedures followed for all matches terminated	4.2 Formal closure procedures carried out for all matches coming to an end	4.2 Analysis of quantitative data from the Program data base	4.2 Not achieved as formal procedures not yet documented
4.3 All parties comfortable with the experience & outcomes of the Homeshare match	3. HHs and HSs comfortable about <ul style="list-style-type: none"> • reasons for closure • experience of Homeshare ongoing or terminated involvement in Homeshare	4.3 A combination of <ul style="list-style-type: none"> • Scrutiny of all matched HH and HS Program files • Analysis of exit interview data from all HHs and HSs involved in terminated matches • Analysis of views of Homeshare Victoria Co-ordinator on process and outcome of closures 	4.3 Partially achieved, only one case to date.

In relation to the experience of closure by the participants, in this instance, the householder and her family members were happy with the way in which the match drew to a close. It was difficult to gauge the homesharer's views but the speed with which she found other accommodation suggests that she may have already been planning to move on. Since leaving she has returned for mail and was extremely pleasant and helpful to the householder. Clearly she harboured no hard feelings.

8.3 Challenges in Match Closure

A great deal more will be learned about this program area as Homeshare Victoria matures and more matches reach the point of closure. Protocols need to be developed for emergency and standard closure procedures. Learning from and documenting this learning, remains the challenge.

SECTION THREE: CONCLUSIONS AND FUTURE ACTIONS

9. Conclusions and Future Actions

The experience of the Pilot Phase of Homeshare Victoria has demonstrated the feasibility of homesharing as a model in Australia. With few options available to older people wishing to stay in their own home but needing practical and psychosocial support in the home over a 24-hour period, the homeshare model clearly has potential. A considerable amount has been achieved by the Pilot over this 15 month period, but the next phase is critical to consolidate and extend what has been learnt, and there remain aspects of homesharing that are unexplored to date.

9.1 Program Implementation

- Homeshare Victoria has been built on solid foundations of review of overseas research and experience of homesharing, and strong local knowledge of aged care issues and service networks.
- The Steering Committee has been an effective management body, participating fully in processes of program management, reflection and on going planning and development.
- Homeshare Victoria has been placed organisationally under the auspices of Mecwa Community Care to the mutual benefit of both organisations. Homeshare Victoria has provided Mecwa with a previously unavailable accommodation and support option for older people that can be offered to its clients, the success of Homeshare Victoria can only enhance Mecwa's reputation. Mecwa has provided Homeshare Victoria with valuable in-kind support and resources, and its networks and reputation have enhanced Homeshare Victoria's public profile and credibility among older people and service networks.
- Homeshare Victoria has put a good deal of effort into becoming well known in its catchment area and increasingly, other aged service agencies are seeking out its services.

- The Program has set itself high standards for recruitment, assessment, introductions, matching, supporting and monitoring matches, and to a large extent, has achieved these. A number of areas remain where more work needs to be done. These include:
 - Clarifying the role and value of companionship in the 10 hours per week of assistance provided by homesharers.
 - Considering ways of clarifying the sharing of utility bills.
 - Ensuring all match participants sign formal agreements.
 - Developing protocols for emergency and standard match closure.
 - Exploring the potential for the provision of respite in homesharing.
 - Exploring the potential for training or social get togethers for homesharers.
- A skilled Co-ordinator has made an important contribution to the development of Homeshare and has contributed substantially to the successful work of recruitment, assessment and matching and promotion of the homesharing model. In addition, the voluntary work by a Steering Committee member experienced in the aged care housing field has enhanced both program administration and program development.
- The broad range of tasks required by a homeshare program especially in its establishment phase and the lack of resources for an administrative assistant placed some strain on the Co-ordinator. Voluntary input by members of the Steering Committee has assisted but this may not be sustainable in the long term. Ways need to be sought to resolve this.
- Homeshare Victoria has sought to maintain close links nationally and internationally with other homeshare programs. Building on the relationship with the NSW Homeshare Program has been hindered by lack of continuity in staffing and management in that state.

9.2 Program Impact

- In just over one year Homeshare Victoria has made 12 matches, maintained a fully assessed pool of potential homesharers and managed a heavy load of recruitment, assessment and introductions, honing skills and experience as the year has progressed. Appropriate support and monitoring of matches has occurred and the closure of the one match that ended was handled with tact and sensitivity.
- The evidence on the impact of the matches to date indicates that homesharing has been beneficial to both householders and homesharers:
 - Older people have been assisted to maintain their independence and to remain in their own homes.
 - Both householders and homesharers have made significant gains in terms of the quality of their lives, with few negative aspects.
 - The presence of the homesharer has in many instances delayed reliance on support services and has both reassured and assisted caring relatives to maintain the older person in their own home, which is where they clearly want to be.
 - Both householders and homesharers have been able to avail themselves of a housing option that is not otherwise available.
 - Householders have been able to access a support option that would not have been available to them without Homeshare.

9.3 Program Outcome

- There are indications that Homeshare Victoria is making a cost effective contribution to the provision of support and accommodation options for older people, to the

reduction of isolation, loneliness and depression in the community and to the enhancement of community cohesion and intergenerational understanding.

9.4 Gaps and Challenges

A number of issues remain open to debate. The on-going capacity of a homeshare program of approximately this size and type is not yet clear. The first year of a new program model clearly includes a considerable amount of time spent on establishment issues. Both the Victorian and New South Wales Programs achieved around 15 matches in their first year. It remains to be seen what a realistic match load is in the longer term. The size of the load may depend on duration and stability of matches. Where matches are of long duration and are stable, requiring little action in terms of support and maintenance, a greater number of matches may be sustainable within program resources. Potentially, where matches are very stable and require little or no input to continue successfully for both parties, then it may be appropriate for these matches to “graduate” from the Program and become self-sustaining. Where matches are of shorter duration and /or require more support, the work of match maintenance and match replacement may mean that the Program can oversee fewer matches.

The NSW evaluation suggests that a program of its size should adopt a target of 20 matches by the end of the second year. The evaluation of the UK Homeshare Program suggested that keeping a Homeshare Program relatively small (at approximately 20 to 24 matches on the books at any one time) has intrinsic advantages. Most notably, these advantages are described as “the highly personalised service, the responsiveness to individual needs and a sensitivity to local communities” (Thornton 1995:24).

In summary, it seems that to maintain current standards and progress, Homeshare Victoria should remain a relatively small organisation. In this way it would be able to continue offering a personalised service, to remain sensitive to the individual needs of the participants and to maintain a close knowledge of the local community and strong links with local aged services.

However, this does raise a second issue that this evaluation is not able to clarify. Homeshare Victoria has been successful in a largely middle class area of homeowners, relatively accessible to centres of employment (the central business district) and to centres of tertiary education. It remains to be demonstrated that the lessons learned here are transferable to different areas with different socio-demographic profiles. The Gippsland Program (which was run along somewhat different lines) was not successful in a largely rural area.

Homeshare Victoria has recruited most of its householders from the cities of Stonnington and Glen Eira as opposed to the City of Port Phillip that has a more working class tradition and a higher proportion of public and private rental tenancies. This may be because of the stronger Mecwa links in the former municipalities, it may be because of different socio-demographic features of Port Phillip. Homeshare programs need to be trialled in areas with different profiles to build up a sense of the capacity of the model to provide housing and support options for older people from different backgrounds.

The question of replicability remains to some extent an open one. The Victorian and the NSW Programs have demonstrated feasibility in the Australian context, and this evaluation has suggested some of the elements of Homeshare Victoria that have contributed to its successful first phase. A new program elsewhere may not be able to replicate these

conditions precisely but will need to build on the existing knowledge. This evaluation suggests that at a minimum a program needs to have

- a receptive area where there are older people with adequate accommodation to offer, where younger people are seeking accommodation that is relatively accessible to employment or education and where sharing is a culturally acceptable practice;
- a supportive organisational base with links to the local aged service system;
- a competent steering committee or group to oversee and support the program, ideally with a good knowledge of aged services and ageing issues and a strong commitment to homesharing;
- a co-ordinator with strong interpersonal skills and a good knowledge of older people, aged care issues and aged care service systems;
- an organisational culture of review and development;
- a sufficient introductory phase to get the program established, and
- adequate resources and staffing levels to ensure program co-ordination and administration.

The final area that remains unclear is the extent of the resources required to run a homeshare program on a recurrent rather than a start up basis. This evaluation has not undertaken a complete costing of Homeshare Victoria nor attempted systematically to separate recurrent from non-recurrent funds. As a new program in the Australian context, Homeshare Victoria has incurred a number of costs that subsequent programs would not need to face. For example, approximately \$30,000 was spent on consultancy fees (for the initial literature search, the exploration of program models and the evaluation), an overseas study trip, and the formal launch of the Program. Apart from this, in the first 15 months of operation of the Program approximately \$65,000 was expended in both recurrent and non-recurrent areas. This figure does not, however, cover the cost of the volunteer administration work and the in-kind organisational support from Mecwa.

It must be remembered that these figures are indicative only. Closer analysis and documentation of Program establishment and recurrent costs needs to be part of the next stage of the Program. A broad based economic analysis of homesharing as model for housing and support for older people should also be undertaken. Some suggestions are made in the final section below of ways in which such an economic analysis could be carried out.

9.5 Actions to support on-going development of the homesharing model

As Homeshare Victoria moves into the second phase of pilot program consolidation, there are a number of ways in which it can build on present experience:

- Ensure that an on-going cycle of formal and informal planning and review continues to be an integral part of program operations.
- Restate the aims and objectives of Homeshare Victoria to reflect the findings of the evaluation and the move into the next phase of Program consolidation. Thus the aim might be to establish or promote homesharing as an integral part of the aged care service system, with objectives that mirror the existing success criteria.
- Set goals in terms of size and scope for future program operations over the next year.
- Continue to explore ways of ensuring that there is an adequate resource base to cover administrative as well as program co-ordination roles.
- Resolve issues around legal liability and formal agreements and ensure that all match participants sign formal agreements.

- Trial and evaluate ways of enhancing the program for example, by the development of training and/or support structures for homesharers, by exploring the possibility of incorporating respite homesharers into the Program.

9.6 Actions to facilitate documentation of Program knowledge and expertise

Building on current experience is critical and action is needed to ensure that the wealth of practice wisdom and experience generated during the Pilot Phase is analysed and documented, and thus made transferable. Strategies here could include:

- the completion of a policy and procedure manual and adoption of a process for continual update,
- the articulation and documentation of the skills necessary in co-ordinator and administrator staff roles,
- the articulation and documentation of the staffing, resource and support requirements for a homeshare program of this nature, and
- transfer of the data collection system onto an electronic database to facilitate tracking of program process and to enhance program review and development.

9.7 Actions to promote homesharing as a model of aged care

Strategies to assist in the further development of homesharing as a housing and support option for older people could include:

- continuing to research, evaluate and document Homeshare Victoria to build on the Pilot Program and to develop a solid body of local and transferable knowledge about homesharing,
- continuing development of links with Australian homesharing programs to extend local knowledge, to promote the extension of homesharing into different settings and to assess feasibility in varied communities,
- approaching an appropriate body such as the Ronald Henderson Foundation or the Centre for Health Program Evaluation to undertake an economic analysis of homesharing, and
- maintaining links with international homeshare networks to ensure Australian initiatives are informed by overseas experience.

Appendix I Homeshare Victoria Steering Committee: Nov 1998 → June 2001

Convenor: Carmel Hurst RN
Nurse Consultant in Aged Services

Treasurer: Jerry Bell MA Hons
Retired Senior Manager in retail involved with Aged Care initiatives

Lynne Grocke Grad Dip Gerontology
Physiotherapist

Judy Stanton BA Hons Grad Dip Gerontology
Psychologist working in educational programs for older and disabled people

Joan Crawford
Public Service Medal for Services to Aged Care

Chris Wroe BA Grad Dip Gerontology
Working in Aged Care

Shirley Anderson BSW Hons
Consultant to Aged Care Services

Tracel Devereux BA Grad Dip Human Services Admin RN
Mecwa General Manager Community Services

Cheree Smith (on maternity leave Dec 2000- Jan 2001)
Mecwa Community Care

Annette Maddern RN
Manager in Aged Care
(to Feb 2001)

Michelle Sanson (Nov 1998-April 1999 when moved to Sydney)
Experienced homesharing when student in UK

Homeshare Co-ordinator
Beris Campbell BA Dip Soc Studs

Appendix II Agencies Funding Homeshare Victoria 2000 & 2001

2000

The Sidney Myer Fund

The Bokhara Foundation

The William Buckland Foundation

The Ian Potter Foundation

The Besen Family Foundation

Freemasonry Victoria

Commonwealth Department of Veterans' Affairs

2001

Department of Human Services Victoria, Home and Community Care Project Development Grant

Appendix III Outline of Interview with Parties to Homeshare Matches

1. Introduction

- Explanation of the interviewer's role and the purpose of the interview
- Reminder that all comments will not be attributed to any individual
- Clarification of interviewee's role, and (if a carer), how long they have been in the role
- Duration of the match at the time of the interview

2. Overall experience or impression of the match

What has been your overall experience of the match? Or What is your overall view of the match?

3. Independence

Has participation in Homeshare made a difference to the older person's independence? Have the following been affected and if so in what ways:

- Capacity to remain in own home physically and emotionally
- Capacity to continue to do 'normal' & familiar things in own environment both physically & mentally
- Any other aspects of independence

4. Quality of life

Has participation in Homeshare made a difference to the Householder's and the Homesharer's quality of life? Have the following been affected and if so in what ways:

- Sense of loneliness/companionship
- Sense of security/insecurity
- Sense of personal wellbeing
- Any other ways in which quality of life has been affected

5. Reliance on family and community services

Has participation in Homeshare made a difference to the older person's need to rely on others such as HACC and family? Have the following been affected and if so in what ways:

- Potential need to move into supported accommodation
- Reliance on community support services
- Capacity to benefit from community support services
- Reliance on family members

6. Provision of a housing option to Homesharer

Has participation in Homeshare made a difference to the accommodation options of housesharers in terms of:

- Independence
- Financial affordability
- Quality of housing
- Homeliness
- Other aspects

7. Views on Program as a whole, and the role of the co-ordinator

As relevant, depending on the role of the interviewee, please comment on:

- Your overall understanding of the Homeshare Program
- The assessment processes that occurred for acceptance into the Program
- The matching processes that occurred
- The negotiation of the agreement
- On-going communication and support since the match was established
- Any other comments on the program or the role of the Co-ordinator

8. Summary

Please comment on

- The main advantage and the main disadvantage you see in Homeshare
- What you would say to others contemplating Homeshare
- Any other comments and reflections

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