

**CANADIAN HOMESHARING MATCH-UP AGENCIES:
FIVE YEAR FOLLOW-UP**

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EXECUTIVE SUMMARY

CANADIAN HOMESHARING EXPERIENCE: COMPARISON 1988-1993

There are many aspects of the Canadian homesharing experience which have changed since 1988, and many aspects which have remained the same. The business of making matches has not changed very much, except for a few minor "tinkerings" e.g. some agencies had instituted more reference checks, others had dropped them. Perhaps one could conclude that this match-making process has evolved to a point that it could be considered fairly well refined. Needless to say, future "tinkerings" will be made to match-making activities as necessary.

At the time of the data collection (June, 1993), a majority of agencies were still operating in Ontario. As mentioned in the post-script, the government of Ontario has eliminated the Homesharing program as of September 1, 1993. Homesharing, in combination with other Community Partners programs, will begin a new chapter in Homesharing history in Ontario. Other programs in Canada have mostly survived on an ad hoc basis up to this point, and will likely do so in future years.

It was also evident that philosophically, homesharing programs still had a housing focus with a concentration on "independent" matches, as opposed to being service-oriented, "dependent" matches. However, progress has been made in Canada on several fronts. The SHARING organization in Metro Toronto has been pivotal in Canada in the development of Share and Care services (service-oriented) and the first Group Shared Residence developed by a Homesharing agency in Canada. In addition, several Homesharing programs in Ontario had converged their operations with other housing services to become "Housing Help" centres e.g. SHAPES. These homesharing programs must be congratulated for stretching the boundaries of the definition of homesharing in Canada.

Philosophically, greater emphasis has been placed on homesharing being an "environmentally friendly" option in keeping with current concern for environmental protection and sustainability. Essentially, the phrasing has been extended from simply "reusing the existing housing stock" to include the word "environment".

In terms of other trends, computers have become a mainstay for many agencies in Canada. A computer program "PROSPER" was devised in 1989 specifically for Homesharing agencies.

It is obvious throughout this report that funding has been a constant strain for all homesharing coordinators in Canada. In fact, the funding situation has worsened since 1988. The creation of a Coalition of Ontario homesharing programs to fight for government funding is evidence of this struggle. Perhaps it is fair to say that homesharing services thrive, at least in the Canadian context, when there is plenty of government funding available. One could also surmise that at this point in Canadian homesharing history, more reliance on non-government sources of funding will need to be pursued if homesharing is to survive in this country.

Besides tenuous funding situations, the recession has had other effects on homesharing organizations during the last 5 years. Coordinators have observed a number of client changes as a result of this recessionary period. An increase in youth, unemployed, and "nouveau poor" (middle-class clients trying to pay their mortgages and stay in their homes/neighbourhoods). Special needs clients, including ex-psychiatric patients, people with AIDS, as well as multicultural clients and frail seniors, have also been on the increase in the past few years. Although it is true that seniors are *not* the *primary* client focus for many agencies today, they still figure prominently as a user group of homesharing services (also true in U.S.).

It was also interesting to see that matches ending due to incompatibility had decreased during the 5 year period (38% in 1988 to 23% in 1993). Hopefully, this downward trend will continue.

CANADA VS. UNITED STATES: SIMILARITIES AND DIFFERENCES

There were found to be a surprising number of similarities between U.S. and Canadian Homesharing agencies. Quite a few differences were also found.

Many more match-up agencies exist in the United States, and their experience in the homesharing business has also been lengthier compared to Canada. Programs are not only more numerous, but also more diversified. Group Shared Residences have grown in popularity in the U.S. especially in the last decade. Although descriptions of service-type matches are very similar, a greater percentage of U.S. agencies deal in service-exchange and personal care matches.

Both Canadian and American research has cited the difficulties agencies encounter regarding their funding situations. Particularly with the after-shocks of American Reaganomics and Canadian Conservative fiscal policy still being felt, it is likely that the acquisition of funding for Homesharing programs will continue to be a difficult proposition. It is interesting to note, however, that many American agencies have leveraged funds from private foundations and donors. Possibly, Canadian agencies can learn from their American counterparts on this point.

One important organizational difference between the two countries, is the presence of the National Shared Housing Resource Center in the United States. The NSHRC has provided much needed technical assistance, training, and information to new and existing agencies and to anyone else interested in learning about shared housing. This agency has been vital to the propagation of shared housing in the United States. Perhaps, in future years, Canada will be fortunate enough to gain a national shared housing information clearinghouse. It is a very time-intensive process to get one Canadian agency operational; without a head organization, this process is akin to "reinventing the wheel" each time a new organization is formed. The NSHRC provides the necessary consultation and information for new organizations in a far more time- and cost-effective manner.

Both countries serve a primarily white anglophone clientele, although many different cultural groups use Homesharing services. It will be worthwhile in future years to study how to create interest in shared housing options amongst various cultural groups. As this study revealed, having a staff person of a certain cultural background and language can create an automatic link to their particular community.

Another similarity, has been the advent of coalitions of homesharing organizations in various states and one province in Canada. The Canadian organization came together to "get political" about the funding situation, as well as to provide a forum for coordinators to share information and network; it is not known exactly what instigated the formation of U.S. coalitions.

It is also curious that the United States appears to have more durable matches (9 month average compared to Canada's 3 month average). It would be interesting to find out why this difference exists. Is there something we could learn from American coordinators in terms of how they organize their services?

It was interesting to find that Canadian and American descriptions of conflicts occurring in matches are remarkably similar. Because appropriate and timely conflict resolution is a key to the success of matches in jeopardy, it would be valuable to find out what resources exist to assist U.S. agencies in this area.

Similar trends with regard to changing client characteristics were seen north and south of border. More youth, special needs clients, frail elderly, etc. are knocking on agencies' doors. As noted previously, Canadian agencies have tended to make small alterations to existing match-up services, whereas the U.S. has responded to these changing characteristics with new programs (with the notable exception of SHARING in Canada). There is much that Canadians can learn from Americans on this point. However, new methods of organizing homesharing services in Canada, i.e. Housing Help Centres, may be worth our American neighbours' attention.

RECOMMENDATIONS

There are many recommendations which could be made at the conclusion of this study. The following policy and research recommendations are the most important to follow-up on in the coming months and years.

It is recommended that:

1. A future study be done to document informal, voluntary and commercial homesharing operations in Canada. How are these programs organized? How do commercial operations do financially? In light of government cutbacks, it is essential to find out how these organizations survive in recessionary times.
2. A detailed study be conducted on the cost-effectiveness of Homesharing vs. other housing/health care options. e.g. nursing home care, home care, subsidized housing, etc.
3. A future evaluation be done of Ontario Homesharing agencies now working under the umbrella of "Community Partners" programs. Is this a more cost-effective means of providing Homesharing services? (Or is this merely a diluted form of Homesharing invented by bureaucrats working within the confines of a bankrupt NDP government?) Do clients prefer this type of service organization?
4. More extensive evaluation criteria be developed to determine agency "success". "Success" should not be based *only* on number of matches made per year. Other activities performed by agencies (e.g. housing counselling, community services information and education) should be worked into the evaluation formula. Also, a more "client based" definition and measure of match success needs to be developed. How does homesharing effect their quality of life?
5. Information be sought on the California and other states' experience where homesharing is thriving as a housing/service option. What promotional techniques do they use to spread the word about shared housing?
6. Case studies be developed on Group Shared Residences in Canada. Where are they? How have they developed? Why is it that Group Shared Residences have flourished in the United States? What are the barriers to developing them in the various regions of Canada?
7. Data be collected on how homesharing works for special needs groups. Single parents, frail elders, persons with AIDS all use homesharing services - what has their experience been?
8. That men who use Homesharing services be studied. Where do these men come from? What circumstances precipitate their coming to Homesharing services?
9. The advent of coalitions be studied. One existed in Canada, and there are several in the U.S. Why were they created? What are their goals as collaborative bodies of homesharing agencies? How are they organized and what do they do?
10. More research be conducted on how conflicts in matches are resolved. This study revealed some interesting data. Additional information may tell us why some matches succeed while others do not. Since match duration (less than 6 months generally) has always been a sore point for funders, this research would be valuable.

11. Other, non-government funding sources should be pursued by Canadian Homesharing Agencies. American Homesharing agencies survive with many private and philanthropic sources of funding.
12. Homesharing organizations study how their programs fit into the current discussions on Long Term Care Reform, a current policy trend in many provinces.
13. That a detailed study be compiled of who *registers* and who gets *matched*. It was revealed in this study that many single parent families, two-parent families and couples, registering as providers and seekers, do not get matched. Why is this?

POST SCRIPT

Shortly after completing the data collection and preliminary write-up of this report, I was informed by two homesharing coordinators in Ontario that the Homesharing Program had been cancelled as of September 1, 1993 (Bacon, 1993; Diegel, 1993). As of this date, the Homesharing program comprises a small part of a new program called "Community Partners". "Community Partners" is made up of seven other housing programs including Access to Permanent Housing, Housing registries, Landlord and Tenant information, and Homesharing. Essentially, the combination of these programs will serve as Housing Help Centres to assist a diverse group of consumers in their housing needs (Moranis, 1994).

INTRODUCTION

PURPOSE

The primary purpose of this study was to update a Canadian homesharing agency study conducted in 1988 (see Gutman, Doyle, Melliship & Baldwin, 1989). Additionally, we wished to see how Canadian homesharing agencies had developed over the five year period in terms of approximating trends reported in the US literature on homesharing. Comparisons will be made between data collected in 1988 and 1993.

OBJECTIVES

The specific objectives of the study were to:

- 1) Update the original homesharing study, and describe similarities and differences of Canadian homesharing agencies between the two time periods.
- 2) Compare American and Canadian research findings.
- 3) Determine if Canadian homesharing agencies now have had experience with the development of homesharing with a care component and/or group shared residences.

METHOD

Literature Review

An exhaustive review of the Canadian and American homesharing literature was conducted. In the process, comparisons between the Canadian and American homesharing experience were highlighted. The literature review was also helpful in revising the original questionnaires from the 1988 Canadian study.

Sample

A search for homesharing agencies across Canada was conducted to determine if new agencies had begun and if some agencies had ceased to operate in the five years since the original study. At the time of the 1988 interviews of homesharing coordinators, 19 agencies were in operation. Fifteen of these agencies were still in operation at the time of the update, and four had closed; seven new agencies had begun operations since 1988. In total, 22 agencies were in operation in June, 1993.

Twenty-one homesharing staff agreed to be interviewed for the 1993 study. Interviews took place from May 25th to June 4th, 1993. They were an average of 1 hour and 15 minutes in duration (range = 45 minutes to 2 hours)

Questionnaire

The most noticeable difference between the original study and the update was the elimination of site visits to homesharing agencies across Canada. Essentially, the 1993 survey consisted of a blending of some questions from the original telephone questionnaire and the site visit survey, with several additional questions (see Appendix). The updated questionnaire included 98 closed and open-ended questions on:

Sponsorship
Agency Objectives
Match-making activities
Match success and failure
Clients
Services/Information provided to clients
Restrictions to service
Management and staffing
Agency Operations
Funding
Coalition (Ontario agencies only)
Service Exchange
Group Shared residences
Homesharing on the shelter/care continuum

The majority of the additional questions, which extended the scope of the original study, were contained in the last four components of the updated questionnaire. Throughout the questionnaire, homesharing staff were asked to reflect on how their agency had changed since 1988.

Statistics

All homesharing agencies were asked to provide quarterly statistical reports for 1992. Agencies in Ontario are required to submit reports to the provincial government covering all aspects of agency operations, so they simply photocopied these reports for this study. Staff of agencies outside of Ontario were requested to fill out statistical reports for each of the four quarters of 1992. In all, 18 agencies provided 1992 quarterly reports. Coordinators were given two pages asking for statistics; 15 agencies completed and returned these.

Analysis

The small sample size did not warrant a detailed quantitative analysis. Frequencies were compiled for each question (see Appendix for tables summarizing responses to the questionnaire and statistical reports).

FINDINGS

The findings are based on the information collected during 21 telephone interviews with coordinators and detailed statistical reports obtained from 17 of 22 agencies in existence as of June, 1993 (1 agency declined to be interviewed). Where appropriate, the data will be compared with data from the original Canadian study compiled in 1988. In addition, recent data collected by the National Shared Housing Resource Centre (NSHRC) in the United States will be used as a point of comparison throughout the findings section, along with other relevant Canadian and American research findings discussed in the literature review. *

I. GENERAL DESCRIPTION OF HOMESHARING AGENCIES IN CANADA

Geographic Distribution

As indicated in Table 1, 17 of the homesharing agencies are located in Ontario, 3 in Quebec, one agency in Nova Scotia and one agency in Alberta. All of the 22 agencies are match-up; however one agency has developed a group shared residence (SisterShare Living, 1993).

Table 1: Geographic Distribution of Canadian Homesharing Agencies by Province, 1993

Province	Number of Agencies
Ontario	17
Quebec	3
Alberta	1
Nova Scotia	1 *

* currently in 1 year funding moratorium

At the time of the original study in 1988, 12 of 19 agencies were located in Ontario; 4 in Quebec and 1 each in Nova Scotia, B.C., and Alberta (Gutman et al, 1989). 15 of these agencies from the 1988 study are still in existence; 4 closed their doors and 7 agencies have started operations since the original study.

By comparison, the United States has approximately 350 homesharing agencies - 225 of these are strictly match-up, 106 are group shared residences and 18 have both components (Danigelis, Harmon and Pond, 1993). Nearly every state is represented, however a greater proportion of agencies are located on the east and west coasts (Jaffe, 1989; Danigelis and Fengler, 1991).

As noted in the literature review, it is evident that programs in the United States are more numerous and diversified compared to Canadian programs. Group shared residences have experienced far more popularity south of the border.

* for a more thorough description of operational and management characteristics of homesharing agencies, please see original report

Agency Location

For the most part, Canadian homesharing programs are located in the downtown centre (16/21). Six programs are located in residential areas, one program is located in a mixed residential/commercial area, and one other is located in a remote area (note: one agency had 3 locations - downtown, residential and remote). Table 2 shows agency locations:

Table 2: Canadian Homesharing Agency Locations, 1993

Location	Number of Agencies
Downtown Centre	16
Residential	6
Residential/Commercial	1
Remote/In Outlying Area	1
Commercial/Industrial	0

Compared to 1988, proportionately more agencies were located in downtown centre locations, and fewer in residential areas.

Type Of Building

The most popular sites for homesharing programs are office buildings, seniors' centres and seniors' apartment buildings (see Table 3). However, a great variety of sites are chosen to house homesharing services. Homesharing programs are located in homes for the aged, schools, store fronts, union buildings and community resource centres, to name a few. Similar results were found in the original study.

Table 3: Type of Building

Building Type	Number of Agencies
Office Building	7
Seniors Centre/ Apartment Building	4
Renovated House	3
School	2
Home for the Aged	2
Union Building	1
YM-YWCA	1
Community Resource Centre	1

Catchment Population (#)

The catchment population for the various agencies across Canada range from a low of about 35,000 in Jonquiere, Quebec to a high of 600,000 people in the City of Toronto. The average population area served is approximately 400,000 (315,000 if one does not include SHARING which serves a population of approximately 2,200,000, therefore skewing the average). 19% of agencies operate in urban areas only, 13% in suburban areas only, 0% in rural areas and 68% serve various combinations of the above.

By contrast, the average target areas served by American agencies has a population of 200,000. 18% of American agencies operate in urban locations only, 23% in suburban only and 8% in rural only; 51% of programs serve combinations of the above. Thus, Canadian and American agencies are roughly comparable in their locations, except for a notable paucity of Canadian agencies operating solely in rural areas.

Year Established

The 22 agencies began operations between 1980 and 1991, with an average lifespan of 6.5 years and a median of 6 years. 4 agencies had begun operations between 1980 and 1983, 3 between 1984 and 1985, 8 between 1986 and 1988 and 7 between 1989 and 1993. *

A recent survey by the National Shared Housing Resource Centre (NSHRC) in the United States found one program to have begun operations in 1932 and another as recently as 1993. The average program opening date was 1987; approximately the same as in Canada. However, homesharing programs have had a longer history in the U.S., with the greatest number coming into existence in the 1980's.

Sponsorship

62 percent (13/21) of the Canadian programs are sponsored by non-profit agencies; 19 percent (4/21) are sponsored by regional or municipal levels of government; and 19 percent (4/21) are autonomous non-profit agencies (see Table 4).

Table 4: Sponsorship Arrangements of Canadian Homesharing Agencies

Sponsor	Seniors' Service	Community Service	Housing/ Health	Other Planning, Social Services, Immigrant Services	TOTAL
Regional/ local municipality	1	0	1	2	4
Private non-profit sponsors	2	5	2	2	13
Autonomous	2	2	0	0	4

* It should also be noted that one of the agencies still in existence, has taken a one year sabbatical between October 1992 and October 1993 (Dartmouth).

By contrast, the 1988 study revealed that 2/18 agencies were publicly sponsored, 14 had private non-profit sponsors and 2 were autonomous. Of the 4 agencies which ceased operations since the original study, 3 were sponsored by non-profit agencies and one was an autonomous non-profit agency. Of the seven agencies which have begun operations since this time, 5 are sponsored by non-profit agencies, 2 are sponsored by a regional or municipal level of government.

The sponsorship arrangements are as varied as the homesharing programs themselves. They include the following sponsors:

- Youth Employment services
- Organization representing low income people
- City - housing department
- Catholic community services
- Regional government - planning department
- YM-YWCA
- Catholic Immigration services
- Canadian Red Cross
- Family Counselling Services
- Victorian Order of Nurses
- Canadian Auto Workers Union
- The Society of Retired and Semi-retired Seniors Centre

It is interesting to note that since the last study, there are less sponsors represented in the "seniors' services" category. This finding primarily reflects a change in Ontario government policy which entailed a move away from a sole focus on seniors to a broader mandate to serve many population groups.

Change In Sponsorship

In addition, 5 agencies have changed their sponsorship status since the original study. Two agencies have changed sponsors and three agencies have become autonomous agencies freeing themselves from their sponsors. It is interesting to note that one of these agencies started off as an autonomous agency, then came under a sponsor's wing, then went back to an autonomous state.

This latter example serves to illustrate that McConnell and Usher's (1980) typology of organizational forms does *not* describe the varied progression of many homesharing agencies. Their typology describes agencies as developing along a continuum from simple to intermediate to advanced states as the agency matures. In essence, the agency described above went from advanced to intermediate and back to advanced form. As noted in the literature review, many agencies remain in one organizational form only, or they may change forms without going along this line of progression. It is suggested that new non-evaluative terms be used to describe the three levels of organizational form: "intrinsic" (instead of simple); "interdependent" (instead of intermediate); and "independent" (instead of advanced).

All (100%) of the Canadian agencies in this study are not-for-profit, although one agency does collect a small registration fee. * By contrast, 82.8 percent of the programs are strictly non-profit in the United States (Danigelis, Harmon and Pond, 1993).

* It should be noted that some commercial and volunteer homesharing agencies are in operation in Canada, but they were not recruited for this study.

Funding

Primary funding sources for Canadian agencies include provincial governments (Alberta Municipal Affairs, Ontario Ministry of Housing, Quebec Health and Social Services), provincial and federal employment development programs, regional and municipal governments, and United Way. Sources of additional funding include the Ontario Women's Directorate, Ontario Ministry of Community and Social services, and client fees (only one agency collects a small fee from its clients).

19 (90%) of the agencies receive at least some monies from the provincial government; 17 (81%) of the agencies receive some money from the regional or municipal government; 5 agencies (24%) receive monies from other sources. Private donors did not make contributions in 1993, but have in other years.

Table 5: Funding — Canadian Homesharing Agencies, 1993

Funding Source	Number of agencies receiving	Percentage (%)
Provincial government	19	90%
Regional/Municipal Government	17	81%
Others, e.g. United Way, client fees	5	24%

As reported in the 1993 NSHRC's survey results, the most frequently mentioned sources of funding in the U.S. are local and county governments (55% of agencies), foundations (38%), state governments (37%) and private donors (33%).

It is evident that U.S. agencies rely less on government funds and have a larger number of donors in the private sector. This finding is also due to many Canadian agencies, particularly those in Ontario, having strict guidelines about who can/can not fund them. i.e. the *municipality*, and not a private body, must supply 25% of funding required in order to leverage provincial monies. (Ontario Ministry of Housing, 1988).

Canadian agency budgets ranged from 0-\$42,600 for 1993, with a median of \$26,666. In previous years funding levels were much higher. For instance, in 1989 the average budget was \$57,000 for Ontario agencies (Ontario Ministry of Housing, 1989). This decrease in funding is due to 17 of the agencies in Ontario being under a funding review; therefore, these agencies have only received an average of \$29,339 from January to June, 1993, mainly from provincial and municipal sources. The average budget for agencies outside of Ontario is \$40,666, *not* including 2 agencies with budgets of \$0.

Of the two agencies which have zero budgets, one has never received any money specifically earmarked for the homesharing program (it is housed in a community information centre - monies were given for this latter function only), and the other agency is currently in a dormant phase of one year (closed due to government cutbacks - hoping to open again in October, 1993).

Five years ago, two-thirds of the agencies were receiving on-going funding subject to meeting performance standards (Ontario and Nova Scotia). The remaining one-third operated on a more precarious basis, being funded on a year-to-year basis only. Compared to 1988, nearly *all* Canadian agencies are now in a precarious funding situation. Nova Scotia's sole homesharing

program is under a funding moratorium of one year and Ontario's programs, which were the only agencies funded by a provincial program, may now possibly not be funded at all.

The median budget for homesharing programs in the United States (*note: both match-up and group shared residences*) is \$25,000, although budgets ranged from 0 - 1 million dollars. In previous years, Canadian homesharing budgets were substantially higher than American budgets. However, due to funding difficulties with the majority of Canadian agencies, their median budget amounts for 1993 are roughly comparable in the two countries.

Funding Difficulties

Funding has typically been difficult for many Canadian and American agencies (Jaffe, 1989; Hwalek and Longley, 1989). Canadian coordinators were asked "What funding difficulties have you encountered in pursuing these different funding sources?" A majority of coordinators voiced their frustration with the uncertainty and piecemeal nature of their funding situations (15/21 - 71%). As one coordinator described it, "It's a constant roller-coaster - not knowing what's going to happen next". They also talked about the lack of recognition and commitment from funders. Hence, like many similar programs, secure, long-term core funding is not a reality. With many provincial and municipal governments experiencing severe debt loads and consequent expenditure cuts, homesharing programs may have difficulties surviving in the years to come.

Other coordinators commented on the lack of flexibility on the government's part in not being able to obtain funding from other sources as a result of overly restrictive guidelines (2/21). Others had no difficulties in their funding situations (2/21). Another coordinator described the "hot potato" syndrome experienced by her homesharing agency, due to her government funder's difficulties in deciding whether homesharing should be funded under housing, health or social services ministries. Additional difficulties included: application process for funding is long and cumbersome; and difficulties in acquiring donations because of the generally poor economy.

Coordinators were then asked, "Are you currently pursuing new sources of funding?" Seven coordinators responded that they *were*, and 14 were *not* trying to access new funding sources. Of the agencies that were seeking new funding, 3 agencies were hopeful that their sponsoring agencies would fund them if the Ontario Ministry of Housing did not come through with funding after the review. 2 other agencies were hoping to obtain additional funding specifically for staffing. Another agency was anticipating some funds from the Quebec health and social services ministry, "Maintien peuple dans la communit " program (keep people in the community program). One other agency had applied for funding from their local union which is making funds available to community groups.

Coalitions

Due to the precarious nature of their funding situations, Ontario agencies formed a coalition in 1991. According to coordinators, the coalition was developed to present a united front to government in order to fight for base funding. The coordinators in the coalition meet on a regular basis to discuss funding and otherwise network and exchange information and support each other. It is interesting to note that American coalitions have also been formed in California, New York, New Jersey, Texas and other states (Mantell and Gildea, 1990).

The Ontario coordinators were involved in a number of ways in the coalition. The majority of coordinators attended meetings (12); were involved in advocacy work (e.g. with committee of legislature, Ministry officials, Minister of Housing); act as representatives for the coalition (Eastern, Central and Western reps.) (5); write reports/put packages of information together for

other coordinators (4); and host meetings (1). 2 other coordinators were not involved in the coalition's activities.

Coordinators were asked, "What benefits have you seen accrue to your agency since the formation of the coalition?" The benefits mentioned include: information sharing and networking (8); funding has continued (4); feel united/sense of togetherness (3); recognition/awareness of homesharing program within government/community/sponsoring agency (3); saved time/cost-effectiveness (2); revitalized advisory committee (1); has helped us to better serve clients (1). Two other coordinators did not feel that any benefits had been achieved and one coordinator did not know if there had been any benefits.

Only two coordinators mentioned any negative consequences associated with the development of the coalition. These two coordinators commented that some politicians have felt that the homesharing coordinators as a whole have "pestered" them too much on the funding issue.

Staffing

18 (86%) Canadian agencies have at least 1 FTE staff person. In 7 agencies there is one person only, 11 (52%) of the programs have one or more part-time staff (usually an assistant coordinator or promotion/marketing person), and 12 (57%) programs have volunteers serving in a number of capacities, usually assisting with office administration, home assessments, interviews and marketing functions. It is important to point out that advisory committees and boards of directors play a significant role in the operational and management direction of homesharing agencies (please refer to original report for detailed description). The *median* staff size is 1.25 FTE and the *average* staff size is 1.3 FTE, *excluding* volunteers; 1.5 FTE and 1.72 FTE respectively, *including* volunteers.

By comparison, 52% of American agencies have full time staff, but in most of these cases it is only one person. 63% have one or more part-time staff, 37% one or more volunteers. The median staff size, *including* volunteers, is 2 (Danigelis, Harmon and Pond, 1993). Therefore, median staff size is similar north and south of the border, with the U.S. having approximately .25 FTE more staff than Canada.

Changes In Staffing

14 (67%) of the Canadian agencies reported changes in staffing numbers since their agency opened. For 9 of the agencies, this change occurred in the later stages of their agency's development (4.1 + years); for 4 in the middle stages (2.1 - 4 years); and for 1 agency, in the beginning stages (0 - 2 years) of their agency's existence. 8 of the coordinators reported increases in staffing levels, while 5 reported decreases.

When asked why staffing levels had *increased*, many of the coordinators responded that their programs had experienced an increase in funding and therefore an increase in staffing (4). Others attributed the change to their program's growth, and the concomitant workload increase which necessitated increased staffing (4).

For those whose staffing levels had *decreased*, the main reasons were funding cuts (3) or a change in sponsorship or a restructuring of their organization (2). One staff person did not know why a change in staffing had occurred (1).

Because of the piecemeal nature of funding in both Canada and the U.S., the staffing levels are often inadequate to support the full range of functions that homesharing agencies perform. For

instance, marketing and promotion of the program, a key component of a successful program, is often inadequate because staff devote most of their time to making matches. As Jaffe (1989) notes;

The small staffs that administer homesharing programs find themselves torn between service activities such as interviewing, matching, and follow-up, and administrative activities, such as fundraising and marketing...Essentially both sets of activities are critical to the long-term viability of the program and neither can be done as well as is desired given the typical level of funding of most programs. (p.7)

In addition, because of the precarious nature of funding, high staff turnover is also a reality for most agencies. Volunteers are an important resource and an integral part of homesharing agencies' survival in both countries.

Cultural Mix Of Staff

Additional questions in the 1993 homesharing survey asked Canadian coordinators about the cultural "mix" and the languages spoken by their homesharing staff. A majority of the agencies have white anglophone staff (20/21 agencies - 95%); however, as Table 6 depicts, many other cultural groups were represented:

Table 6: Cultural Mix of Canadian Homesharing Agency Staff, 1993

Cultural Background	Number of agencies with staff of that cultural background	Percentage (%)
Caucasian	20	95%
Hispanic	3	14%
Afro-Caribbean	3	14%
Aboriginal Canadian	2	10%
African	2	10%
Afghan	1	5%
Asian (Orient)	0	0%

In addition, although most agencies first language was English, a surprisingly diverse array of languages were spoken by staff. French, Spanish, Italian, Somali, Arabic, and many other languages were used in the business of making homesharing matches, as Table 7 illustrates:

Table 7: Languages Spoken by Canadian Homesharing Agency Staff, 1993

Cultural Background	Number of agencies with staff speaking language	Percentage (%)
English	20	95%
French	9	43%
Spanish	3	14%
Italian	3	14%
Somali	2	10%
Arabic	2	10%
Polish	2	10%
Farsi	2	10%
Persian	1	5%
Amharic	1	5%
Chinese	1	5%
Creole/Patois	1	5%
Vietnamese	1	5%
Slavic	1	5%

Many of these agencies included multilingual staff who worked for their sponsoring agency. Five agencies also mentioned that they had access to translation services or they had volunteers with language capabilities.

Coordinators were asked, "Do you feel that having a bi- or multi-lingual person on staff has benefited your agency?" Fourteen coordinators felt that it had benefited their agency in the following ways:

- creates a comfortable, friendly environment if client can speak language of preference, facilitates matching process and follow-up, mediation (9)
- opened up client pool to different cultural groups (4)
- necessary to do business with francophones in area (North Bay/Montreal) (2)
- time and money saved in not having to find translators (1)

The researcher for this current study is not aware of any studies in the U.S. documenting the cultural mix of staff.

Objectives

Coordinators were asked to describe their agency's *primary* objective. * They outlined the following objectives:

- 1) to assist people who are interested in homesharing and/or finding safe, affordable accommodation (15/21 - 72%)
- 2) to enable people to remain independent in the community (10/21 - 48%)
- 3) to provide a service to older persons/others in need (2/21 - 10%)
- 4) to better use the existing housing stock (2/21 - 10%)
- 5) to enhance quality of life through housing (2/21 - 10%)

Additional objectives mentioned by coordinators included: to increase the supply of affordable housing; to provide education and advocacy around housing (poverty, racism); to establish community awareness re: shared housing.

These objectives reveal a strong housing focus of Canadian agencies, primarily due to 17 of 22 agencies being funded by the Ontario Ministry of Housing. However, as noted in the original Canadian study, those agencies outside of Ontario responded more to the service needs of seniors (Gutman et al., 1989).

A previous study of American agencies (cited in Jaffe and Howe, 1988) described 50% of homesharing programs in the U.S. as having a housing-oriented focus ("to increase the supply of affordable housing in their communities by making available space in underutilized houses"); 17% of programs were considered to be service-oriented ("set up primarily to provide services to the elderly through homesharing") and 33% held to both goals. Compared to Canadian agencies, U.S. agencies are more heterogeneous in their goals, i.e. not just focused on housing.

Changes In Objectives

Coordinators were asked to compare their current objectives to their objectives when their agency first opened its doors. 14 coordinators responded that there had *not* been a change in objectives' whereas, 6 responded that there had been a change. The changes in objectives were mainly related to a current broader client focus (before concentrated on seniors, single parents or singles)(5); or more specific client focus (1) (used to concentrate on women only, now include men).

The changes in client focus occurred primarily because the agencies found that peer match-making (between seniors) wasn't working; or to meet the needs of clients who were requesting service; or because of a change in sponsorship. The changes in objectives occurred in the beginning (0-2 years - 3 agencies), middle (2.1-4 years - 2 agencies) and later stages (4.1 years + - 2 agencies) of the agencies development.

Promotion

For Canadian agencies, the most common sources of program awareness for *homeproviders* were, in descending order, miscellaneous forms of promotion e.g. transit ads, magazines, recruited landlords, etc., human interest stories in newspapers, family and friends, former clients, and

* 6 agencies had a combination of objectives, and were therefore unable to give a primary objective only.

brochures/flyers. *Homeseekers* first found out about the program through, in descending order, hostels/temporary shelters, social service agency/worker, municipal welfare office, and family and friends.

The importance of both formal and informal routes of promotion are apparent from these findings; Social services as well as family and friends figure prominently in the statistics. Data compiled in Ontario in 1987 and 1989 revealed similar results (Ontario Ministry of Housing, 1987 & 1989). Research in the U.S. is also comparable (Pritchard and Perkocha, 1989; Pranschke, 1987). It is important to keep in mind that different methods can be successful in one geographical area but not in another (Spence and Boyd, 1988). In addition, many variables play a part.

II. SERVICES OFFERED

Match-Making

All of the Canadian agencies can be described under Dobkin's 1983 definition of the referral and counselling model of homesharing - those that do more than just exchange phone numbers between provider and seeker clients. An extensive array of services are offered to ease clients into homesharing situations. 100% (21) agencies provide interviews for all clients; 80% (17) provide reference checks; 71% (15) view homeproviders home; 80% (17) arrange introductions between potential homesharers; 62% (13) provide sample homesharers' agreements; and 100% (21) provide follow-up to see how the match is progressing. Table 8 below reflects the diverse array of services offered through homesharing agencies in Canada

Table 8: Matchmaking Services of Canadian Homesharing Agencies, 1993

Matchmaking Activities	Number of Agencies		
	Yes	No	Optional
Interviewing each client	21	0	—
Conduct in-depth home interview	17	4	—
Reference checks: Medical	5	12	4
Landlord	13	8	
Police	2	16	
Personal	15	6	
View home provider's home	15	5	1
View homeseeker's home	1	19	1
Signing of disclaimer (liability waiver)	19	2	—
Referral of homesharers to each other	18	3	—
Arranging introductions between potential homesharers	17	3	1
Attend introductions between potential homesharers	11	7	3
Organize introductory teas, socials	5	16	—
Provide sample homesharers agreement (2 give guide to homesharing checklist)	13	7	1
Assist in drawing up "homesharers" agreement	14	4	3
Arrangement of trial periods	14	4	3
Follow-up to see how match is progressing:	21	0	—
phone calls	20	1	—
home visits	4	4	13
Mediation of disputes	20	1	—

Changes In Match-Making Activities

Coordinators were asked to identify what match-making activities had changed since their agency first opened. 14 of the 21 coordinators indicated that one or more activities had changed. The activities which were either added, omitted or otherwise changed were as varied as the agencies themselves. Some agencies became more stringent and "more involved" with clients whereas others became "less involved". For instance, some agencies introduced reference checks and others dropped the need for clients to provide references. The list below spotlights the alterations in match-making activities made by individual agencies:

ACTIVITIES ADDED

- focus more on follow-up and mediation for matches currently in place
- landlords require co-signer
- attend more introductions more aggressive in making matches e.g. drive seekers to potential providers' homes

- more careful about pointing out realities of homesharing. Therefore, ask more questions of seekers e.g. previous accommodation/work history.
- fax application forms to out-of-town seekers
- introduced follow-up and references

ACTIVITIES OMITTED

- providers used to provide references
- used to do more personal interviews
- dropped disclaimer
- used to get more involved now don't get into "personal baggage" of clients
- used to do introductions for everyone and attend all introductions now only do them for seniors and disabled

ACTIVITIES OTHERWISE CHANGED

- became more streamlined in our match-making process
- used to do medical reference, but added another character reference instead
- developed an accommodation directory, to facilitate housing options counselling
- questions asked in interview are different

These changes were instituted in the beginning stages (0-2 years) for 3 agencies; in the middle stages (2.1-4 years) for 5 agencies; in the later stages (4.1+ years) for 4 agencies; and 2 agencies gradually put systems in place since they opened.

The reasoning behind the various changes in match-making activities were quite specific to the kind of change made. For instance, the agency that now requires a co-signer, instituted this change because many landlords were left with unpaid rent on account of the recession which has been particularly hard in Southern Ontario. Generally, the changes were made in order to become more effective and/or more efficient in making matches.

Additional Services/Information Provided to Clients

Counselling

20 agencies (95%) provide counselling to clients. Coordinators identified the various forms of counselling provided:

- housing options counselling
- community services information and education
- interpersonal skills for homesharing
- crisis/supportive counselling
- ethno-specific counselling to afro-caribbean community
- landlord and tenant issues
- financial information on homesharing effects on social security

Most agencies provided housing options counselling and community services information; the remaining forms of counselling were performed by a small percentage of agencies, as Table 9 illustrates.

Table 9: Types of Counselling offered by Canadian Homesharing Agencies, 1993

Type of Counselling	Occurrence in match-up phase (number of agencies)			Number of Agencies
	Before	During	After	
Housing options counselling	17	4	10	20
Community services information and education	15	12	6	18
Interpersonal skills for homesharing	0	2	0	2
Crisis/supportive counselling	2	1	0	2
Ethno-specific counselling to Afro-Caribbean community	1	1	1	1
Landlord/tenant issues	1	0	0	1
Financial information on homesharing effects on social security	1	1	0	1

The importance of Counselling

Coordinators were asked, "Do you think counselling is necessary for matching?" A majority of coordinators felt that counselling was necessary for making matches (18). Some felt that clients needed to know what housing options were available before they could make a choice (7). Others responded that clients needed to understand all angles of the homesharing option before they were matched (4). Another 4 coordinators explained that clients come to their service with a mixed bag of problems, and therefore they need to work on these problems before homesharing can become a realistic option. 3 others felt that it was important to develop a relationship with clients in order to make an appropriate match and/or clients feel comfortable coming back to agency if there are any problems.

Community Service Referrals

All 21 (100%) of agencies routinely referred clients to other services offered in the community. It is interesting to see the wide range of services used as referral points. They include:

- other housing services (included other homesharing agencies, registries, shelters, crisis housing) (21)
- legal services (11)
- income assistance (11)
- home support agencies (includes home care and homemakers) (11)
- education/employment centres (10)
- seniors centre (8)

- medical services (8)
 - family/personal counselling (7)
 - social workers (6)
 - multicultural centre/immigrant settlement (5)
 - social services (4)
 - drug/alcohol treatment (4)
 - women's help centre (includes ethnic women, support group for divorced women) (4)
 - friendly visiting (4)
 - meals-on-wheels (4)
 - rent review services (landlord and tenant) (3)
 - credit/financial management (3)
 - literacy/ESL (3)
 - mental health centre (3)
 - geriatric assessment program (2)
 - sex assault support (2)
 - abuse centre/elder abuse organization (2)
 - community information centre (2)
 - telephone assurance program
 - transportation (2)
 - home handyman services (2)
 - foodbanks (2)
- ... and many more

Seven agencies indicated that their referral points had changed since their agency first opened. Reasons were that new services had begun and also that the service/referral network has increased through their agency's efforts. One coordinator also explained that their agencies had younger clients who needed different services e.g. foodbank, employment or ESL. Another agency experienced a change in sponsoring agency and therefore their referral points had been altered.

Restrictions

A majority of agencies had at least one restriction on who they served (see Table 10). The primary restrictions related to age, geographic area, ability of clients to take care of themselves, mental health and drug/alcohol abuse.

Table 10: Restrictions on Clients Served, Canadian Homesharing Agencies, 1993

Restriction Category	Number of agencies that restrict for homeproviders	Number of agencies that restrict for homeseekers
Age	17	16
Geographic	20	12
Ability to take care of themselves	14	14
Household type	11	0
Mental health	12	12
Drug/alcohol abuse	12	12
Length of time on registry	2	2
Financial	1	0
Other: Abuse/violent behaviour	2	2
Homeless	1	1
Gender (no men)	1	1

In term of age restrictions, three agencies required that providers be 55 years or more, *or* one person in the match be 55 years or older. Another agency required that one client be 50 years or more. Other agencies limited their services to adults only. The number of agencies with the 55+ restriction has decreased proportionately since the first study (in 1988, 8 of 18 agencies required that at least one person in the match be 55+; and one agency 55+ or single parent). Similar to the American experience, more and more Canadian agencies have given up this seniors only restriction.

Most agencies restrict their services to a specific geographic area, usually the city limits (20 of 21 agencies for homeproviders).

14 agencies had restrictions for homeproviders' and homeseekers' ability to take care of themselves. However, for 6 of these agencies, if their ADL were taken care of e.g. through homecare, then it was not considered to be a problem.

For 12 agencies, restrictions related to clients' mental health problems, as well as drug and alcohol abuse problems. These restrictions applied to both homeproviders and homeseekers. For 5 of these agencies, if the client's alcohol, drug or mental health problem was "controlled" and their condition would not impede a homesharing arrangement, then they were accepted into the program i.e. person using medication to control schizophrenia; or person had been "dry" for 2 years and/or had a counselor's letter of reference for verification.

The results of the original homesharing study revealed that more weight was given to the home seekers' problems compared to homeproviders' problems (Gutman et al., 1989). The current study found that equal weighting was given to both types of clients.

Additional restrictions included: clients' length of time on the registry; household type; financial (e.g. if providers wanted more than \$300 rent, they were told not to apply); gender (no men); clients' history of abuse/violent behaviour and homelessness.

III. DESCRIPTION OF CLIENTS

Target Populations

Coordinators were asked to identify the primary target populations of their services (more than one allowed in responses). As can be seen in Table 11 below, 6 of 21 agencies had no target populations. Fourteen (66%) promoted their services to elderly clients (12 to "well" elderly and 2 to "frail" elderly persons*). Low-income persons are a target group for five agencies. Three agencies target single parents. Additional target groups included: newcomers to Canada, visible minorities, youth/students, ex-psychiatric patients, and homeless people. These findings reveal that a strong seniors' focus remains in terms of who homesharing agencies promote their services to, despite pressures from other groups in the population.

Table 11: Target Populations of Canadian Homesharing Agencies, 1993

Population Group	Number of Agencies
Well older persons	12
No target population	6
Low-income persons	5
Single-parent families	3
Frail elderly	2
Newcomers to Canada	2
Visible minorities including aboriginal Canadians	2
Youth/students	2
Hard-to-house (ex-psychiatric/homeless)	1

Client Motivations For Sharing

As seen in the quarterly statistics for 1992, the three primary motivations for sharing in Canada were: financial, companionship, and stability/security. Similar findings were seen in a survey of American homesharing clients (Pynoos et al., 1990), as well as a study of agencies in Ontario in 1988 (Spence, 1989). The original Canadian study also had comparable results, even though only matches with seniors 55+ were looked at. Financial concerns decreased and companionship needs increased with advanced age, especially for those over 75 (Gutman et al., 1989).

It is interesting to note, however, that financial need is a stronger motivator for providers compared to seekers in this sample. Past research has found the opposite; financial reasons are usually a stronger force for homeseekers coming to homesharing programs. It is possible that the recession

* Semi-independent, but not necessarily needing personal care.

has created financial difficulties for homeproviders and therefore they are seeking sharing partners to help with housing expenses, including mortgage payments.

Clients' Family Status, Age And Gender

Many homesharing programs in the U.S. and Canada began with a sole focus on seniors, some even attempting senior peer matches only. It was soon realized that there were far more senior providers than senior seekers (Jaffe and Howe, 1988), that many seniors preferred intergenerational matches and consequently that more matches could be made per agency by opening up the client pool to more than just the seniors' population (Spence, 1989). Although, a vast majority of homesharing clients north and south of the border are single, many single parents, families, couples and other family configurations use homesharing services:

Table 12: Canadian Homesharing Clients' Family Status: Registered vs. Matched Clients

Family Status	Registered		Matched	
	Providers	Seekers	Providers	Seekers
Single	889 (47%)	2634 (81%)	378 (72%)	522 (92%)
Single parent	273 (14%)	402 (12%)	42 (8%)	29 (5%)
Two parent/Couple	654 (34%)	216 (7%)	71 (14%)	14 (2%)
Other non-traditional households	86 (5%)	16 (-)	32 (6%)	3 (-)

It is important to compare who *registers* and who subsequently gets *matched*. The table above highlights the fact that many single parent families, two-parent families and couples, registering as providers and seekers, do *not* get matched.

In terms of the ages of *matched* clients in Canada, the homeproviders tended to be older and the homeseekers were more likely to be younger. It is interesting to note that proportionately more providers over the age of 55 were matched, compared to the number that registered. The table below shows a percentage breakdown by age of homeproviders and homeseekers for both *registered* and *matched* clients.

Table 13: Canadian Homesharing Clients' Age: Registered vs. Matched Clients

Age Category	Registered		Matched	
	Providers	Seekers	Providers	Seekers
16-24	74 (3%)	915 (27%)	19 (4%)	153 (24%)
25-54	1468 (68%)	2045 (61%)	273 (51%)	414 (66%)
55+	616 (29%)	411 (12%)	248 (46%)	60 (10%)

25 percent of American programs have clients under 18 years old; 67 percent have clients between 18 to 24; 90 percent have clients between 24 to 59; 89 percent 60 to 74; 80 percent have clients 75 to 84; and 63% have clients 85 years and older (Danigelis, Harmon and Pond, 1993). However it is important to note that the recent NSHRC study collected their data differently, and therefore it is

difficult to compare with Canadian data. It is also not known if the data refers to matched or registered clients.

A similar inverse relationship between homeproviders and homeseekers ages has been noted in the United States (Jaffe and Howe, 1988). It is evident that Canadian and American agencies serve a wide variety of age groups, but it is reassuring to see that the senior population is still a strong client group.

The current Canadian study found that 66 percent of *registered* clients were female. A similar percentage was also revealed in the American findings; - 68 percent of clients in the United States were female (Danigelis, Harmon and Pond, 1993). Other studies have supported this finding that a majority of homesharing clients are female (Howe et al., 1984; Pritchard, 1983; Pynoos et al, 1990).

Table 14: Canadian Homesharing Clients' Gender: Registered vs. Matched Clients

Gender	Registered		Matched	
	Providers	Seekers	Providers	Seekers
Male	863 (41%)	1575 (52%)	218 (33%)	358 (54%)
Female	1226 (59%)	1420 (48%)	435 (67%)	668 (46%)

It is apparent that proportionately fewer male providers get matched after registration compared to their female counterparts. Little difference was seen in the seeker category.

Data was also collected on the different gender combinations of matched clients. 39% of matched provider/seeker parties were both female; 21% were both male; and 40% were female and male. The latter category is particularly interesting, and somewhat unexpected.

Clients' Ethnicity

Statistics on ethnicity and income are not collected by most Canadian agencies. However, coordinators were asked to estimate a percentage breakdown of the cultural mix of their clients. These estimates revealed that a majority of clients were white (range: one agency - 25% of clients to another agency - 100% of clients). All but one of the agencies served a wide variety of cultural groups. African, Caribbean, Asian, Hispanic, Middle-eastern and Aboriginal Canadians were served (see Table 15 for percentage breakdown). The client mix was contingent on a number of factors, including geographical area and cultural make-up of staff. For instance, the one agency that only served white clients was geographically isolated, compared to other agencies.

Table 15: Cultural Background of Canadian Homesharing Clients, 1993 (Estimated)

Cultural Background	Number of Agencies Serving	Approximate % of Total Clients
Caucasian	21	79%
African/Caribbean	8	6%
Asian	8	5%
Hispanic	9	5%
Aboriginal Canadian	6	1%
Middle Eastern	1	1%

Similarly in the U.S., the vast majority of clients are white (Danigelis, Harmon and Pond, 1993; Pynoos et al., 1990); but many other client groups are served. The recent American study found that 56 percent of programs served African American clients, 51% serve Hispanic American clients, 38% serve Asian American clients (Danigelis, Harmon and Pond, 1993). Again, these percentages are difficult to compare with Canadian findings due to differences in data collection/reporting.

Canadian coordinators were asked in what ways having a bi- or multi-lingual person on staff had benefited their agency. Many of the Canadian coordinators noted that having a multicultural staff served several important functions:

- 1) opened up client pool to different cultural groups;
- 2) created a more comfortable environment when client could speak language of preference;
- 3) staff could find out preferences of clients more easily, being sensitive to cultural differences in those preferences e.g. some cultural groups believe dogs and other domestic animals are "dirty"
- 4) time saved in not having to find translators

Clients' Income

Although income information is not collected from Canadian homesharing clients, 5 of 17 agencies (29%) target low income persons. U.S. agencies also reported serving a large number of lower income clients, many with incomes under \$5,000 (Danigelis, Harmon and Pond, 1993). Clients generally pay less than market rent for homesharing accommodation. In Canada, the average *non-service* exchange rent was \$320; \$250 was paid for the average *service* exchange rent.

Changing Client Characteristics

Canadian coordinators were asked in what ways they felt client characteristics had changed in the past few years. Five important trends were seen in their answers:

- 1) An increase in youth, including high school students (many on welfare);
- 2) An increase in special needs clients e.g. ex-psychiatric patients (and other clients with mental health problems), people with AIDS to a lesser extent, and others;

- 3) More unemployed, lower income clients; generally people in work and/or relationship transitions;
- 4) An increase in multicultural clients, including newcomers to Canada; and
- 5) To a lesser extent, senior providers who are older, more frail and/or needier in some way.

It is interesting to note that some coordinators have also noticed an increase in middle-class homeowners coming to their services because they are in jeopardy of losing their homes due to unemployment and increasing housing costs.

Coordinators attributed many of these trends to the recession which has created financial, social and family pressures. In addition, the de-institutionalization of psychiatric patients and lack of appropriate supports in the community was another factor mentioned.

Similar trends have been noted in recent U.S. and Canadian reports (ARA Consulting Group, 1993; Pritchard and Perkocha, 1989; NSHRC, 1988). What is different though, is how Canadian and American agencies have responded to these changing client characteristics. Canadian agencies have generally made small alterations to their existing match-up programs e.g. targeted advertising to new client groups; more crisis counselling and support, etc. The U.S. has gone farther than their Canadian counterparts and responded to these changing needs by adding new services e.g. group shared residences, increased arrangement of matches involving service exchanges, and specific programs geared to special population groups e.g. single parents and students (NSHRC, 1988).

It is important to note that a small contingent of Canadian agencies have taken steps to develop Group Shared Residences and programs specializing in service exchanges. This will be explored later in the report.

IV. DESCRIPTION OF MATCHES

Inquiries, Interviews and Matches

In 1992, 17 Canadian agencies received 17,639 inquiries; frequencies ranged from 152 -3130 inquiries with a median number of inquiries equaling 433. From the approximately 3575 client interviews conducted, close to 600 matches were made with approximately 1354 clients being matched. So about 38% of those interviewed were eventually matched.

By comparison, the U.S. agencies reported 63,000 inquiries made by 97 match-up programs. Nearly 23,000 clients were interviewed with about 1/3 of these being matched. It seems that proportionately, Canadian agencies conducted more interviews compared to American agencies, and a slightly higher proportion of interviewed clients were eventually matched.

Placements

Another important service performed by homesharing agencies is placements into accessory apartments, and other rental apartments. In 1992, 8 agencies made 696 placements; a median of 6.5 placements per year (2 agencies had 474 and 152 placements respectively, therefore a high average of 87 per year). The remaining 13 agencies did not provide placement services.

Match Typology

As discussed in the literature review, Jaffe and Howe (1988) developed a typology of matches based on the degree of independence of each participant in the match. Homeproviders and homeseekers were described as "independents", "transitionals" and "dependents". Homeproviders

and seekers at similar levels on the independence-dependence continuum are hypothesized to have a greater likelihood of being matched together. U.S. research has found that 55% of matches nationwide are independent (staple of housing-oriented programs), 40% of matches are transitional (staple of service-oriented programs), and 5% are made of dependent matches.

Using data gathered in the present study, a breakdown of matches according to the Jaffe and Howe typology is as follows: 94% of matches in Canada were independent, 4% were transitional, and 2% were dependent.

In terms of the Pynoos service typology, 54% of matches in the U.S. were considered to be service free, 20% were defined as a service-exchange, and 26% as service dependent. In Canada, 75% of matches were found to be service-free, 19% were service-exchange and 6% were service dependent.

The significantly higher number of service-free matches in Canada can be attributed to the housing-oriented nature of Canadian agencies. Again, these statistics reveal the greater diversity of homesharing in the United States.

Intergenerational Matches

Approximately 37 percent of Canadian matches made in 1992 were intergenerational, with one person in the match being 55 years or more. Comparable statistics have been reported in U.S. and Canadian research (Jaffe and Howe, 1988; Spence and Boyd, 1988; NSHRC, 1988). Of course, many variations exist amongst individual agencies. Studies of individual agencies report intergenerational matches as high as 60 to 70 percent (Pynoos et al., 1990).

Coordinators were asked, "Do you think intergenerational matches are more, less or equally durable than those in which both sharers are elderly?" There was no consensus in the responses to this question. Four coordinators responded "more", one responded "less", eight responded "equally" and eight had no answer. Some preliminary research in the U.S. has suggested that intergenerational matches are more durable. A more thorough investigation tracking individual matches will need to be done to find out if intergenerational matches are more durable in the Canadian context.

Match Success

Canadian coordinators were asked what they felt were the three most important contributing factors or reasons behind the formation of successful matches. The most frequent responses were as follows:

- flexibility in negotiating day-to-day aspects of shared living/good communication (11/21)
- similar lifestyles (8/21)
- compatible personalities (7/21)
- respect for privacy/other people's space (7/21)
- seekers really need a home i.e. they do not have many housing options available to them, therefore willing to make concessions and work hard at making homesharing match a success (4/21)
- providers need income due to financial difficulties (4/21)

Research compiled in Ontario (1989) and in Michigan (1987) revealed comparable findings when staff were asked similar questions. Flexibility, being respectful of separateness and togetherness,

and being good communicators were deemed to be important contributing factors to successful homesharing relationships.

Match Termination

Most *terminated* matches in Canada last for only 3 months (34%); nearly one-quarter of these matches last between 3-6 months; 17% between 6-12 months; and 16% for more than a year. Many matches in the latter category had survived for more than 2 years. Interestingly, of the *on-going* matches (i.e. matches still in existence), close to one-third (29%) have lasted for one year or more. Table 16 below compares terminated and on-going matches in terms of their respective duration (1992).

Table 16: Match duration: terminated and on-going matches, 1993

	Duration (months)						
	<3	3 - <6	6 - <12	12 - <18	18 - <24	24+	Unknown
Terminated matches	34%	23%	17%	8%	5%	5%	8%
On-going matches	20%	25%	20%	13%	6%	10%	5%

The statistics from the United States indicate that matches are more durable south of the border. The *average* match lasted for 9 months, and 26% of matches endure for at least one year (Danigelis, Harmon and Pond, 1993). One could speculate that the greater durability of matches in the United States may be due to their lengthier experience in the homesharing business.

Reasons For Match Termination

Reasons for match termination are as individual as the matches themselves, but generally fall into the following categories (taken from 1992 Canadian quarterly statistics forms):

Table 17: Terminated matches by reason for termination, Canadian homesharing matches (13 agencies), 1992

Reason	Percentage
Change in seeker status	31%
Incompatibility/Breach of obligation	23%
Other	22%
As planned	15%
Provider moving/Needs space	7%
Quality of accommodation	2%

The original Canadian study reported a much higher level of matches ending due to incompatibility (38%). One could speculate that the agencies' experience gained in the last 5 years has resulted in less matches ending due to sharers not being compatible. Possibly their greater experience with screening, interviewing, follow-up and mediation procedures has resulted in a consequent decrease

in matches ending due to incompatibility. Another explanation is plausible. The original study focused on the 55+ population of sharers only. Perhaps, as a group, the 55+ group have more incompatible matches.

Coordinators were also asked, as part of the telephone interview, what they felt were the three most common contributing factors behind match dissolution. Many reasons were given, but the most frequently cited reasons were:

- incompatibility/irreconcilable differences (15/21)
- change in seekers status (e.g. marrying, moving to start a new job, education) (8/21)
- unrealistic or unreasonable expectations (8/21)
- change in provider status (e.g. marrying, provider moving to a higher level of care) (7/21)
- breach of obligation e.g. seeker not paying rent (5/21)
- lack of honesty e.g. alcoholic who didn't acknowledge drinking problem during intake (4/21)

The coordinators' opinions of why matches end are comparable with the statistics from the quarterly reports, except incompatibility does not figure as prominently in the actual statistics.

A small study of 30 Michigan homesharers conducted by Hwalek (1987) found similar trends in relation to match dissolution. Change in seeker and/or provider status, personality differences, lack of privacy and matches ending as planned were the most common reasons for matches ending.

Match Conflict and Mediation

If a conflictual situation occurs in a match, most of the Canadian agencies will intervene and provide mediation. 17 homesharing agencies provided this service, while 4 agencies indicated that they did not involve themselves in conflict resolution. Of those that did provide conflict resolution services, 14 coordinators and 7 staff members were involved.

The most common conflictual situations requiring mediation identified by Canadian coordinators were:

- incompatible lifestyles (7)
- problems relating to the telephone (e.g. overuse, non-payment of bills, not giving messages to other sharer) (5)
- different expectations re: housekeeping standards (4)
- rules and regulations imposed by the provider - too rigid. Provider too demanding/domineering. (3)
- disputes re: what the agreement was/rules were at the start of the match (3)

Additional areas of conflict are as varied as the homesharing matches themselves. They include:

- outside family member intruding (e.g. daughter of provider jealous of homesharer)
- lack of communication
- one sharer wants more companionship i.e. one homesharer wants a shared relationship where they are a family, other one does not
- abuse of use of car

- non-payment of hydro
- power issues esp. between men and women sharing
- not doing services in exchange for lower rent
- lack of honesty/disclosure at beginning of match e.g. health issue - mental health problem of one sharer not disclosed
- violence/aggression
- sexual advances.

It is interesting to note that similar, although not identical, conflictual situations have also been reported in the United States. Pynoos et al. (1990) reported that the most common problems identified by homesharers in the United States were disputes relating to personality, cooking and housework.

Coordinators were asked to describe the process they used to mediate disputes. Usually a provider or seeker will phone the agency to discuss the problem, or otherwise the coordinator will discover the problem during a routine follow-up call. The coordinator will either talk to both parties individually on the phone, or meet them individually or together in person (either at the office or at home and after she has agreement from both parties to mediate). The coordinator and the two parties will discuss the issue thoroughly before attempting to find "common ground".

Depending on the outcome of this meeting, the coordinator would try to negotiate a resolution or otherwise plan to deal with the homesharers splitting up and possibly finding another homesharing situation for one or both sharers. If it is decided that a resolution is possible then the coordinator would seek an agreement from both sharers on the steps towards this resolution. Usually many follow-up calls are made to see how the match is progressing. In addition, other agencies may be brought in to help at different points in the process e.g. legal services for unpaid rent, police, homemakers, social workers, etc. It is important to note that not all coordinators followed this conflict mediation process step-by-step, but this describes a "typical" process used by a majority of homesharing staff.

The numbers of conflictual situations that coordinators dealt with in 1992 ranged from 1 - 50 situations. If the one outlying agency that had 50 situations is left out, this range is 1 - 10. On average, a typical agency had 6 situations, with a median of 3 situations in 1992.

In terms of how many of these situations were "successfully" mediated, the range was 0 - 42 (0 - 6 when outlying 42 left out). An average of 4 and a median of 1 conflictual situation(s) were successfully mediated in 1992. It is worth noting that many coordinators disagreed with the researcher's definition of "success" being equated to homesharers *remaining* in the match. A few coordinators argued that "successful" could also refer to sharers ending a match and coming to a cordial agreement as a result of mediation. The numbers cited in this section should therefore be read with these two divergent definitions in mind.

Several coordinators indicated that usually by the time one of the homesharers has phoned to report a problem situation with their counterpart, the match could effectively be considered "over". As one Canadian coordinator stated, "If they call you in, it's too late". In other words, the problem between the sharers is beyond resolution. However, one agency disagreed with this philosophy. They had instituted intensive follow-up procedures and had managed to successfully mediate 85% of their conflictual situations arising in 1992 (42/50 situations). Pynoos et al. (1990) found that some problems were easier to resolve than others. Cooking and housework problems were the least likely to be resolved(10%), whereas, personality problems were most likely to be resolved (21%).

V. SERVICE EXCHANGES IN MATCHES

90% (19/21) of Canadian agencies arranged matches involving service exchanges in 1992. The most common services exchanged from homeseekers to homeproviders included yard work, housework, cooking, snow removal, baby-sitting/help with children and shopping.

Homeproviders usually did not provide services to seekers in exchange. * If they did, the most common services were cooking and laundry. Typically homeproviders in service-exchange matches were older, more frail or 'needier' in some other way, compared to non-service exchange matches. Single parents in need of child care services were also mentioned as providers. Seekers had a greater financial need compared to their non-service match counterparts.

Personal Care Matches

Only four Canadian agencies (19%) arranged any matches involving personal care. Of the *total service-exchange* matches which these four coordinators had arranged, they estimated that 7 -20% were personal care. Several coordinators also mentioned that personal care situations came into play later as some matches progressed. i.e. aging in place occurred, so seeker would then perform some personal care services for the provider.

The characteristics of the providers and seekers in personal care matches were similar to the service exchange matches described above, but more exaggerated e.g. providers were more frail. Seekers in this category of matches frequently had training in a health care profession and tended to have an altruistic bent to their natures.

According to coordinators, the match-making process for service-exchange matches tended to take longer, be more intensive and more personalized. The engineering of the match usually involved more "reality counselling", setting up of a contract, and intensive follow-up, especially for personal care matches. Danigelis and Fengler (1990) and Howe and Jaffe (1989) in the U.S. have described similar client characteristics and match-making processes.

As noted before in this report, service-oriented programs, and to a lesser extent programs involving personal care matches, are more common in the United States. However, one Canadian agency targeting seniors began an offshoot program called "Share and Care" to provide match-making services for service-exchange matches involving semi-independent elderly persons. However, this agency does not perform many personal care matches.

According to many of the coordinators interviewed, a primary reason for not getting involved in personal care matches is due to liability and because of the accessibility of home care in most areas of Canada. In addition, because many of the Canadian programs are funded under a housing mandate, few agencies have had the opportunity to venture into a more service-oriented program direction. This is an area that needs further research.

Coordinators were asked if they felt that service-exchange matches on the whole were more, less, or equally durable compare to *non-service* exchange matches. There was no consensus amongst the coordinators - 3 coordinators responded "more"; 3 responded "less" and 1 responded "equally". Fourteen coordinators had no answer to this question. It is evident that a more thorough

* It is important to keep in mind that homeproviders were not always the care-recipients and conversely homeseekers were not always the care-givers. However, the majority of matches involving service-exchange did involve a semi-independent homeprovider and more able-bodied homeseeker.

investigation will need to be done to discover how match durability is linked to various types of matches

VI. GROUP SHARED RESIDENCES

Homesharing can also involve people living in a house specifically developed for the purpose of shared living. Usually a non-profit agency has primary responsibility for the operation and maintenance of a residence housing several, usually four or more, unrelated people (Jaffe and Howe, 1988; Golant, 1992). These residences will often arrange housekeeping and/or meals for the individuals living there (Blackie, 1985; Golant, 1992), however, day-to-day decision-making and management of the home are the responsibility of the residents. Abbeyfield houses are an example of this form of supportive housing (Abbeyfield Society, 1993).

As mentioned before, few of the Canadian agencies are involved in the development of group shared residences. In the United States, 30% of homesharing agencies are group shared residence programs. Only 3/21 Canadian agencies had any experience with GSR's (in 2 of these cases, their sponsoring organization, *not* the homesharing agency itself, were involved in the development). Interestingly though, a few other Canadian agencies had been approached by members/organizations in their communities to provide services of this nature.

SHARING, a homesharing agency in Metro Toronto, spearheaded the development of a 5 unit co-op group residence, funded through the Ontario Ministry of Housing with the City of Toronto holding the mortgage. * Total funding included \$10,000 start-up, \$246,000 to purchase the home, and \$100,000 for renovations (therefore, approximately \$80,000 MUP).

Currently, 5 women are living in the co-op. All the women "are marginalized in one way or another", according to the coordinator. The house is both intergenerational and multicultural. The age range is 41 to 82 years old. Nationalities span the cultural spectrum - Yugoslavian, West-Indian, Chinese and Anglo-Canadian.

The co-op opened in December, 1992. The rent is geared-to-income — 25% of after tax income, approximately \$108 to \$115 per month.

There is no live-in help as residents are expected to be able to live independently. However, an 'enhanced management person' is there one day per week to assist with management and organization of the co-op. Residents are involved with the day-to-day decisions of the co-op's organization, as in most co-ops (e.g. rules and regulations re: cleaning and visitors).

Windsor homesharing also matches homesharing clients into co-op units developed by their sponsoring organization, the Canadian Autoworkers Union (CAW). The clients are primarily from the Association for Community Living, and they are usually matched into 4 bedroom townhouses. Five or six matches of this sort have taken place.

The City of Toronto homesharing program also has similar situation to Windsor with their sponsors, but as of yet have not made any matches. In addition, Scarborough Housing Help is in the process of developing a 5 unit co-op with other organizations. Another homesharing program was offered a house for 4-5 people to be matched into, but they declined the offer because of the liability issue.

* For a full description of this co-op's development, please read As I Grow Old, Do I Have to Live Alone?: A Guide to Developing a Shared Living Environment (1993).

VII. IMPACT AND OBSTACLES OF HOMESHARING

Impact Of Homesharing

Coordinators were asked, "What do you consider to be the most important impact of your homesharing agency in your community?" The most frequent responses were:

- helps keep people in their homes and in familiar community e.g., seniors out of institutions, people in jeopardy and youth out of hostels (9/21)
- increases housing options and availability of housing units (7/21)
- helps people find stable, affordable and good quality housing (7/21)
- it's an "environmentally friendly" way of using existing housing (6/21)
- assists low-income people in need of housing (3/21)

Cost Savings For Government

Canadian coordinators estimated that approximately 18% of matches in 1992 allowed providers to remain in their homes, thereby avoiding premature institutionalization, or seekers to remain in their familiar communities. In addition, 14% of matches made it possible for seekers to move from subsidized accommodation (e.g. hostel and public or assisted rental housing). These estimates are obviously difficult to verify; to date, the researcher is not aware of any study conducted in Canada to validate these estimates.

Recent U.S. data corresponds closely with the Canadian data. American coordinators estimate that 15% of their clients would be institutionalized if it weren't for their programs (Danigelis, Harmon and Pond, 1993). These estimates suggest the important potential that homesharing can have in lessening health care costs for governments. Numerous case studies in the literature also point to the cost benefits that can be had with homesharing programs in place.

Housing Intensification

Approximately 56% of the 1427 listed accommodations were registered for the first time. This translates to 803 new units in 1992 alone. It is believed that these units would otherwise not have been placed on the market. With the current emphasis on environmental issues, homesharing plays a small yet important role in "recycling" the existing housing stock.

Obstacles

Coordinators were asked to describe the obstacles to homesharing in their respective communities. The following response categories summarize their answers:

- lack of public awareness/misconceptions re: homesharing concept (12/21)
- funding barriers (9/21)
- recruitment difficulties e.g. imbalance between providers and seekers recruited (4/21)

Continuum Of Care

As concluded in the original study, it is evident that in the Canadian context, the place of homesharing in the shelter-care continuum is firmly at the shelter end of the continuum (Gutman et al., 1989). Essentially, at the time of the update, little had changed. Only one pilot project has explored services combined with housing through homesharing.

Homesharing is one of many options on the shelter-care continuum, and is appropriate for a small portion of the population. As Spence (1989) points out:

By no means is homesharing a panacea for solving our housing problems, but it does serve as a viable, satisfactory approach for a significant number of individuals. The concept must be viewed in its proper context: as one small part of a comprehensive housing strategy designed to assist both elderly persons and other groups of the population. (p. 97)

The American experience suggests that homesharing is an interesting housing *and service* option in terms of where it fits in the continuum of care. Its uniqueness lies in its ability to respond to a wide range of client needs and abilities, even if these needs change. It is possible, for instance, for an older person to be in a service-free homesharing match for many years, but later require more services from the seekers as s/he ages in place.

Possibly because of the well developed home care system in Canada, there has been less need for homesharing at the service end of the continuum. Future research will need to explore whether Canadian homesharing moves in the direction of its American counterpart or remains more a housing than a service option.

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