

**KEY FACTORS IN THE SURVIVAL OF NON-PROFIT  
HOMESHARING PROGRAMS SERVING SENIORS IN  
CANADA**

by

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## **Abstract**

This study investigated key factors in the survival of non-profit homesharing programs serving seniors in Canada. Homesharing programs offer counseling and referral services to clients interested in homesharing, a housing option defined as a living arrangement in which unrelated people live together in a single dwelling, sharing common areas such as the kitchen and living room but having a private bedroom. Canadian nonprofit organizations have been offering homesharing services for over 20 years. Since 1980 there have been 35 programs established in Canada; currently, 10 remain in operation.

The study examined and compared the characteristics of surviving homesharing programs in Canada with findings of the two previous Canadian studies. The primary goal of the study however was to test four hypotheses based on the Open Systems approach and to identify those variables in the internal environment most likely associated with a homesharing program's survival.

For some variables, all 35 established homesharing programs were included. For other variables, data on six of the 10 surviving and on 21 closed programs (15 from the 1989 study) were employed in the analysis. New data testing the study hypotheses were collected from six surviving and six closed programs using a written questionnaire which addressed the programs' operating and organizational characteristics. This study also included an in-depth telephone interview with the six surviving programs. Unpaired t-tests, bivariate analysis and survival analysis were employed to evaluate differences in the internal environment of surviving and closed homesharing programs serving seniors in Canada.

This study revealed several key differences in the internal environment of surviving and closed programs. When compared to closed programs, surviving programs tended to have longer lifespans and they had different target population and client restrictions. They tended to be of the interdependent form, offered fewer matchmaking and counseling services and provided more referrals. Surviving programs were more likely than closed programs to use adaptive strategies.

The implications of these findings are discussed in relation to the Open Systems (OS) model. They provide insight into the key factors in the survival of homesharing programs serving seniors in Canada which may be of value for existing programs and for those which in the future may be established.

## **Dedication**

*For the late Doris Johnstone*

Grandmother, seamstress, world traveler, card shark, counselor, financial advisor, confidante, mentor, and friend.

Fondly remembered by your unconditional love, wisdom and fiery spirit.

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# Chapter 1

## Introduction

### *1.1. Rationale for the Study*

With population aging, there is a growing concern among housing providers on how they are going to meet the needs and preferences of Canadian seniors. In 1996, over 13% of the Canadian population was 65 years of age and over and it is projected that by 2031, this figure will increase to 25% (Statistics Canada, 1997). In 1996, 96% of seniors were living in a private dwelling, and 29% of these individuals were living alone (Statistics Canada, 1997). However, as they age and become more frail, many of these seniors will no longer be able to live independently in their own home. If poor health limits a senior's capacity to live independently, moving to an institution is then necessary to receive the additional care needed.

The high cost of long term care and the issue of seniors being placed inappropriately in institutions (Rekart and Trevelyan, 1990) have prompted housing and health professionals to develop several housing options and alternative services to extend independence in the home and community (Filion, Wister, and Coblenz, 1992). The availability of community programs, resources and appropriate housing environments are pivotal in determining whether or not seniors can remain independent in the community. Many community-based programs such as "Meals on Wheels" and home support encompass services that facilitate remaining at home in the community (Radher and Farge, 1990). Also, past and current research on housing for the elderly has provided practical information on home modifications, and purpose-built housing has been developed such as congregate care, "granny flats", Abbeyfield houses and

assisted living facilities. However, these housing options require the individual to move. One alternative housing choice that promotes aging in place, and which comprises the focus of this project, is homesharing.

Homesharing is an innovative alternative type of housing utilized by approximately 2% of Canadian seniors (Statistics Canada, 1999a). Homesharing is defined as: “a living arrangement in which unrelated people occupy a single dwelling, share common areas, such as the kitchen, bathrooms and living rooms, [and] have some private space, including bedrooms” (Rahder, Farge, & Todres, 1991: 1). Homesharing participants are often termed home providers and home seekers. A home provider is defined as an individual who owns a dwelling with two or more bedrooms, is legally able to rent, and wants to share his/her home (Center for Applied Gerontology, 1999). A home seeker is defined as an individual who desires a new housing situation and is willing to share with another individual (Center for Applied Gerontology, 1999). A match exists when both sharers come to an agreement whereby the home provider provides housing to the home seeker in exchange for rent, or in some cases, in exchange for services, such as housekeeping, cooking, and/or companionship.

Homesharing can be initiated in four different ways. Firstly, homesharing matches can be self-initiated or naturally occurring, whereby home sharers negotiate their agreement privately with little or no outside involvement (Gutman and Doyle, 1989; Jaffe, 1989). A second situation involves a housing registry, whereby an organization provides contact information but the home sharers must rely on their own capacities and resources to create a match (Schreter, 1986, Thornton, 1995). Thirdly, there are homesharing programs, which are either stand-alone organizations that only offer homesharing or multi-service organizations offering a homesharing program as one of their services. Both these types of homesharing programs are formal organizations that provide

specific matchmaking services such as screening, matching, and follow-up services (Gutman and Doyle, 1989; Jaffe, 1989). Finally, programs can offer shared housing, whereby the program owns or manages a group home (CMHC, 1989; Gutman and Doyle, 1989; Jaffe & Howe, 1988), such as an Abbeyfield. The primary focus of this study was on the third type: programs that provide matching services and referral and/or counselling to its clients.

Homesharing and homesharing programs are not new: formal homesharing programs have been in effect in the Canadian nonprofit sector since 1980. Currently, there are 10 homesharing programs in Canada, down from 22 in 1994 and 19 in 1989. Homesharing programs have a stronger history in the US which boasts over 350 programs with some in operation for over 25 years. More recently, homesharing programs have been introduced in the United Kingdom, Australian, Austria, Czech Republic, Germany and Spain (Homeshare International, 2001).

The small number of homesharing programs in Canada, the small population being served, and the high number of closed programs since 1994 (15) pose some concerns regarding the sustainability of this option in Canada. As part of the nonprofit sector, Canadian homesharing programs tend to rely heavily on public funding, sponsorship and volunteers for their survival. The research conducted to date suggests that nonprofit organizations are experiencing major threats to their survival due to dramatic changes in their external environments including cutbacks in public funding and increased pressure to be accountable to their funders (Alexander, 2000; Jacksonville, 1998; Miller, 1998).

Cutbacks in public funding and the devolution of government programs have resulted in responsibilities being shifted to the nonprofit sector making nonprofit organizations increasingly vulnerable financially. Consequently, they

must compete with one another for foundation, corporate and individual donations (Alexander, 2000; Jacksonville, 1998). Additionally, foundations are placing a greater importance on business-oriented practices and expect nonprofits to be professionally managed and to demonstrate measurable outcomes while keeping their operating costs low (Alexander, 2000; Jacksonville, 1998; Miller 1998).

As a result of these changes, many Canadian nonprofit programs, including homesharing organizations, are hampered in their expansion and development plans and many programs have been forced to close. However, there appear to be a small number of very successful homesharing programs in Canada, some of which have been in existence for over 12 years. This suggests the possibility that there may be a set of key factors associated with a program's survival.

## **1.2. *Organizational Survival***

The literature on nonprofit organizational survival (Heuer, 1999; McFarlane and Roach, 1999; Jacksonville, 1998; Bielefeld, 1994; Liebschutz, 1992, in Alexander, 2000; McMurtry et al., 1991; Hadley and Culhane, 1993, in Alexander, 2000) describes "ideal" characteristics for nonprofit organizations as including:

- A clear and operational mission and objectives to carry it out
- Effective and ongoing strategic planning
- An effective and knowledgeable board of directors
- Strong leadership
- Funding, staffing and volunteer resources to carry out the mission
- Accountable to clients, the community and funders
- Evaluation of its programs and surveys clientele for service feedback, and;



- The ability to adapt its internal structure to address the changes in the external environment

These "ideal" characteristics can be categorized into four main components: (1) organizational motivation, (2) organizational capacity, (3) accountability and (4) adaptive strategies and are further discussed in Chapter 3.

### **1.3 Purpose of the Study**

The most recent study of Canadian homesharing programs was conducted in 1993 by Boyd-Noel. It was a follow up of an earlier study completed by Gutman and Doyle in 1989. This study, together with the other two, presents a 12-year longitudinal view of homesharing programs in Canada.

The research goals of this study were twofold. The first was to examine and compare the range of client services and operational characteristics of surviving homesharing programs in Canada with the findings of the two previous Canadian studies, and secondly, to identify and describe those variables in the internal environment most likely associated with a homesharing organization's survival.

In general, Canadian research on survival of nonprofit organizations is in its early stages with very few studies or reports available (Hall and Banting, 1999). This research can contribute to the existing literature on organizational effectiveness and adaptive strategies for Canadian nonprofit organizations as well as provide direction for current homesharing programs and for programs under development.

## **Chapter 2**

### **Literature Review**

The literature on homesharing is divided into two types. The first is concerned with the individual home sharers and the second type gives insight into the programs that have been developed to assist individuals. The first section of this chapter provides a description of the housing needs of seniors as well as an explanation of why some seniors choose homesharing as an alternative to moving and the individual benefits of homesharing. This background information is important in demonstrating the rationale for offering homesharing as an alternative housing choice for seniors and to exemplify the feasibility of homesharing for a small portion of clients. The second section provides the history and rationale for homesharing programs in Canada as well as a description of Canadian homesharing programs.

#### ***2.1. Providing Housing to Canadian Seniors: Alternative Choices for Diversified Needs***

There are several factors from a demographic perspective as to why homesharing is an important housing option for seniors living in Canada. As the population ages into the 21<sup>st</sup> century and as cities are faced with a higher prevalence of homelessness, increased rental rates, and decreased housing stock, alternative housing choices, such as homesharing, become important for seniors and other populations. The following sections review the key demographic

factors and trends that support alternative housing choices such as homesharing for seniors with diversified needs.

### **2.1.1. Living arrangements**

In 1996, approximately 93% of all Canadians aged 65 years and over lived in a private dwelling, while only 7% lived in collective dwellings.<sup>1</sup> Of those living in a private dwelling, 58% lived with a spouse/common-law partner, 7% resided with extended family, 29% lived alone, and 2% lived with non-relatives (Statistics Canada, 1999).

When the data is disaggregated by age, differences in living arrangement patterns become more apparent. Firstly, the proportion of Canadian seniors living in a private dwelling decreases with age. In 1996, only 66% of all seniors aged 85 years and over lived at home, compared with 91% of seniors 75-84 years and 98% of those aged 65 to 74 years (Statistics Canada, 1999). Generally, as seniors become older, they are less likely to remain independent. This is likely due to poorer health, loss of a spouse, lower income, loneliness, etc., and one or all of these factors could be reasons why seniors would choose to enter into a homesharing living arrangement.

### **2.1.2. Living alone**

Women are more likely than men to living alone; in 1996, 49% of Canadian women aged 75-84 years and 58% of women 85 years and over lived

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<sup>1</sup> Statistics Canada describes collective dwellings as households including hospitals, special care centres, special care centres, prisons, correctional institutions, religious institutions, boarding homes, military and work camps.

alone compared with 19% of Canadian men aged 75-84 years and 29% of men 85 years and over (Statistics Canada, 1999). More often than not, men tend to live with a spouse; 73% of all Canadian men 75-84 years and 56% of men 85 years and over lived their spouse or common-law partner (Statistics Canada, 1999a). Regardless of gender, many of these seniors who live alone face issues such as isolation, loneliness and financial constraints. An alternative housing option such as homesharing allows some seniors the opportunity for companionship, increased finances and a sense of security in their own homes.

### **2.1.3. Tenure**

In 1999, 68% percent of all households headed by a person aged 65 years and over owned their own home. This percentage has increased from 64% in 1988 (Statistics Canada, 1999b). Furthermore, in 1997, approximately nine out of ten home-owning households headed by a senior were mortgage-free (Statistics Canada, 1999). While the majority of seniors own their homes, it is significant to note that 32 % of seniors 65 years and over rent their dwellings.

Seniors can enter a homesharing agreement for the purpose of financially managing their own homes by renting out a room, or to pay rent at an affordable rate<sup>2</sup> in someone else's home. Regardless of the type of homesharing agreement, the senior is given the choice and the ability to live independently for as long as possible.

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<sup>2</sup> Affordable rate is used in conjunction with affordable housing, which is defined as 30% or less of an individual's total monthly earnings going towards their cost of housing.

## 2.2. *To Stay or Move?*

Many older adults have not made plans regarding housing for the future as many assume they will not need to move (AARP, 1997). The general tendency for seniors is to stay at home, but individuals vary in their feelings towards a move and in their reasons for staying in their homes (CMHC, 1991; Fogel, 1992; Golant and LaGreca, 1994). This knowledge is relevant when developing seniors housing and/or when seniors choose to explore an alternative housing option such as homesharing.

Generally, the decision to move is made when a senior experiences a change in health status, social support, finances, marital status and/or perceives the neighbourhood as unsafe (CMHC, 1991; Wiseman, 1980). Since many seniors own their home, there is an increased probability of home maintenance and repairs, mobility impairments, difficulty with housework and/or isolation and loneliness (CMHC, 1991; The Daily, 1999a). As a result, the housing may become less comfortable, unsafe and financially inefficient for the senior and they are faced with deciding what housing will best suit their current needs (Wiseman, 1980).

Some seniors are reluctant to leave their homes. Previous studies have shown that seniors' attachment to their home is a major reason why older adults are reluctant to move (O'Bryant, 1983; Howell, 1985; Fogel, 1992; Groves and Wilson, 1992). According to Golant (1984, cited in Howell, 1985), attachment to place is psychological; individuals give meaning to their home in many different ways. The literature shows that many seniors see their homes as part of family tradition and as a place with stored moments and memoirs and the senior may feel strongly about staying (Fogel, 1992; Howell, 1985; O'Bryant, 1983). Also, some seniors feel very comfortable in their home, despite a lack of upkeep and

repairs being done to the home. Heat, easy maintenance, familiarity with environment and design, are all reasons why some seniors choose to stay (Fogel, 1992; O'Bryant, 1983). Finally, the ability to remain independent in one's home is often perceived by older persons as "evidence of self-sufficiency and competence" (O'Bryant, 1983:40). This suggests that an older person's home becomes a symbol of continuity and the ability to function autonomously in the home and in the community. Seniors who feel their competency is high may dissuade their decision to move.

The above findings suggest that there are many factors to consider when examining seniors housing and the psychological and physical aspects of choosing to stay or move. Seniors often consider homesharing as a housing alternative to offset some of the physical, cognitive, emotional and/or financial changes they may be experiencing in their lives. Others choose it to remain in their own home. The following sections examine the individual benefits of offering homesharing as a housing option for seniors.

### ***2.3. Individual Benefits of Choosing Homesharing***

Even though only 2% of older Canadians use homesharing as their living arrangement, studies in the US indicate that 19% of seniors would consider homesharing if they had to move (AARP, 1996). Previous research indicates that home sharers commit to homesharing for four reasons: companionship, financial assistance, assistance with daily living and security (Boyd-Noel, 1994; Cowan, 1990; Danigelis and Fengler, 1991; Doyle, 1989; ; Eckert & Murrey, 1984; Gutman and Doyle, 1989; Jaffe, 1989; NSHRC, 1986; Pynoos, Hamburger and June, 1990; Rapelje, 1985; Thorton, 1995; Wall, 1987).

### **2.3.1. Companionship**

In Gutman and Doyle's 1989 study, companionship was the number one reason that both home providers (59%) and home seekers (41%) gave for choosing homesharing. For the elderly home provider who lives alone, isolation and loneliness are frequent complaints; homesharing can help provide a sense of family, community, intergenerational relationships, and friendship. Home seekers, who themselves are characteristically single, often see homesharing as a means to add a social aspect to their lives (Jaffe, 1989; Gutman and Doyle, 1989).

### **2.3.2. Financial Need**

Financial need is often a reason for homesharing. In 1989, 34% of Canadian home providers and 41% of home seekers chose homesharing for financial reasons. Home providers, who are often on a fixed income, see homesharing as means to supplement their monthly income (Gutman and Doyle, 1989).

### **2.3.3. Assistance with Daily Living**

Gutman and Doyle (1989) found that 25% of all home providers needed some assistance with daily living. For this reason, some homesharing programs promote matches that included a service exchange component, or a service exchange and rent match.

### **2.3.4. Security**

There is little research on the enhancement of sense of security in homesharing matches, however, many elderly clients have stated that safety and security are reasons for entering a homesharing match (Centre for Applied

Gerontology, 1999; Gutman and Doyle, 1989). In Minnesota's evaluation of their state homesharing program, 56% of their clientele expressed a greater sense of security after moving into their homesharing arrangements (Centre for Applied Gerontology, 1999).

In summary, the literature suggests that a variety of housing options are needed to meet the diverse needs of seniors. As a result, many health and housing organizations are offering housing alternatives to seniors along a housing continuum, from complete independence to supportive housing to facility care. Homesharing is located between complete independence and supportive housing, and may appeal to seniors requiring little assistance but extra finances and/or companionship as well as to those requiring higher levels of assistance, including such daily activities as cooking and cleaning.

#### ***2.4. History and Rationale of Homesharing Programs in Canada***

Homesharing programs serving seniors first became formalized in Canada in 1980. Between 1980 and 1988, 25 programs were established. In 1989 there were 19 programs in operation in Canada and there were 22 programs by 1994 (Boyd-Noel, 1994; Gutman and Doyle, 1989). The majority of homesharing programs were established in Ontario and Quebec, but Alberta, and Nova Scotia and British Columbia (BC) also had programs (Boyd-Noel, 1994; Gutman and Doyle, 1989).

There was a large growth of programs between 1986 and 1988 especially in Ontario (Gutman and Doyle, 1989). This was due in part to the involvement of the Ministry of Housing of Ontario (MOH). In 1985, the MOH provided core funding to three pilot homesharing programs on a 75% cost basis (Spence, 1986). The concept of homesharing appealed to the MOH for several reasons: it



provided a continuum of care, it appeared to be cost-effective and it increased use of existing housing stock. These reasons are further supported in the literature (see Centre for Applied Gerontology, 1999; Cowan, 1990; Danigelis & Fengler, 1990; Schreter, 1986; Doyle, 1989; Jaffe and Howe, 1989; NSHRC, 1986; Varady, 1988). Homesharing was also financially attractive to home sharers, was an increased source of alternative housing and the concept seemed easy to conceptualize (Spence, 1986). The MOH felt that homesharing could expand and anticipated that by 1989 there would be 22 homesharing programs in Ontario (Spence, 1986).

However, in 1993 the government of Ontario eliminated homesharing from its funded programs. In order to survive, several of the existing homesharing programs had to merge with other housing services into "Housing Help" centres which offer a variety of housing services to different target populations (Boyd-Noel, 1994). In 1996, the provincial government terminated additional funds to nonprofits not providing core mandatory services (Miller, 1998). This caused further chaos in the nonprofit sector and likely accounted for the high closure rate of homesharing programs (15) between 1994 and 1999.

Alberta and BC also had programs since the mid 80s and both provinces continue to offer homesharing programs. These western provinces, however, did not have a coalition or provincial funding and consequently, many had a difficult time maintaining their sponsorship and funding. Table 1 shows the history of homesharing programs in Canada by province, period of establishment and period of closure.

**Table 1**  
**Homesharing Programs by Province, Period of Establishment and Period of Closure**

Province	Period of Establishment				Period of Closure				Total Surviving
	1980 - 1988	1989 - 1993	1994 - 2000	Total Established	1980 - 1988	1989 - 1993	1994 - 2000	Total Closed	
B.C.	2	0	1	3	1	1	0	2	1
A.B.	1	0	2	3	0	0	2	2	1
M.B.	1	0	0	1	1	0	0	1	0
O.N.	13	7	0	20	1	1	12	14	6
Q.C.	7	0	0	7	3	2	0	5	2
N.S.	1	0	0	1	0	0	1	1	0
<b>Total</b>	<b>25</b>	<b>7</b>	<b>3</b>	<b>35</b>	<b>6</b>	<b>4</b>	<b>15</b>	<b>25</b>	<b>10</b>

### 2.5. Characteristics of Homesharing Programs in Canada

In 1988, Gutman and Doyle conducted a study of homesharing programs in Canada and in 1993, Boyd-Noel did a follow-up of the 1989 study. Both studies examined the general characteristics of homesharing programs as well as some organizational characteristics. For detailed information on these, see the full reports (Boyd-Noel, 1994; Gutman and Doyle, 1989).

#### 2.5.1. Form

Based on organizational form, there are two types of homesharing program. The first is a “stand-alone” program, whereby the organization only offers homesharing. The second type is a multi-service organization, in which homesharing is one of many programs. Homesharing programs are categorized according to their organizational independence, including intrinsic, interdependent and independent (Boyd-Noel). An intrinsic program refers to one or more staff within an existing department or program who were freed to engage in match-up activities (Boyd-Noel, 1994; Gutman and Doyle, 1989). An interdependent program is an independent program within a multi-service

organization and an independent program is a separate entity (Boyd-Noel, 1994; Gutman and Doyle, 1989)<sup>3</sup>.

### **2.5.2. Type of Services**

Homesharing programs serve seniors by two methods: referral only, and referral and counselling. The former consists of basic matching activities including intake and screening (Gutman and Doyle, 1989). However, once the referral has been made, the program steps aside and responsibility is placed on the individual home sharers to coordinate a match. The second model, the referral and counselling model, offers a more diversified set of services such as housing counselling, links to community services, outreach programs, assistance with homesharing agreements, and follow-up services (Dobkin, 1983; Gutman and Doyle, 1989).

According to the previous Canadian homesharing studies conducted by Gutman and Doyle (1989) and Boyd-Noel (1994), all of the Canadian homesharing programs in 1989 and 1994 were referral and counselling. Both studies showed that the majority of the existing programs at that time offered to interview potential homesharing clients and refer them to each other. Additionally, almost all of the programs offered help preparing clients for

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<sup>3</sup> These three terms were modified by Boyd-Noel (1994) from Gutman and Doyle's (1989) terms, which included simple, intermediate and advanced. These older terms suggested that programs moved along a continuum depending on their funding and human resources (Gutman and Doyle, 1989). However, the 1994 study by Boyd-Noel showed that this was not the case in all instances. She found that while most programs or organizations remained as one form, others changed and not necessarily along a continuum (Boyd-Noel, 1994). She changed the title of these three terms (simple, intermediate and advanced) to intrinsic, interdependent and independent to better reflect changes in organizational independence.

interviews with other potential home sharers, conducted interviews, and checked personal references (Boyd-Noel, 1994; Gutman and Doyle, 1989).

Regarding other services, 89% of the 1989 programs offered counselling services and referrals and 95% of the 1994 programs offered counselling services and 100% referred their clients. The three main types of counseling services were housing options counselling, community services information and education and interpersonal skills for homesharing. Referrals made by homesharing programs were made to other housing services, legal services, income assistance, home support agencies, education/employment centres, seniors centres, medical services, family/personal counseling and social workers.

### **2.5.3. Niche Management**

The purpose of niche management is to evaluate the organization's position in the external environment and determine which target market matches the organization's services (Hodge, Anthony and Gales, 1996; International Development Research Centre (IDRC), 1996). For an organization's survival, the right clients need to be marketed to and the services offered must meet their needs. While many homesharing programs in Canada began by targeting seniors as their clientele, soon after establishment, it became clear to most that there were more senior home providers than home seekers (Jaffe & Howe, 1988). Gutman and Doyle's 1989 study surveyed programs that specifically targeted adults 55 years and over and the majority of programs operated based on the premise that one party needed to be 55 years and over. Boyd-Noel's (1994) study found that target populations varied including having no target population, seniors, low-income individuals, single-parent families, newcomers to Canada and youths/students.

In the 1989 and 1994 studies, the majority of Canadian programs used a variety of promotional and advertising techniques to market their services. They were: flyer distribution; local newspaper, radio and TV advertising; posters in community centres; bus advertising; direct mailing; press releases; telephone and community information displays (Boyd-Noel; Gutman and Doyle, 1989).

#### **2.5.4. Client Restrictions**

Some homesharing programs restrict their services to certain clients such as those with mental health challenges, criminal record, drug/alcohol abuse, age, geographic location, financial and level of independence. The majority of homesharing programs restricted clients based on their geographic location, ability to take care of themselves, mental health status, drug and alcohol abuse and their ability to take care of themselves. Other restrictions included financial, criminal record and length of time on registry.

In summary, based on findings from the literature on homesharing programs, it appears that homesharing is a viable housing option for a small number of seniors wishing to remain independent. However, since 1989, 25 of the 35 established programs have closed, leaving 10 survivors. This suggests that a set of key factors may be associated with their survival. The following chapter describes organizational theory and several of its components in relation to the survival of homesharing programs in Canada.

## Chapter 3

### Nonprofit Organizational Survival: Theory and Concepts

Understanding how organizations and their programs are formed and sustained are important aspects of studying organizational survival. For homesharing programs serving seniors in Canada, it is crucial to understand how these organizations survive in the nonprofit sector given the changes in the relations between the government and nonprofits and cutbacks in public funding.

The following sections provide a definition of nonprofit organizations and describe what factors affect survivability as well as explore organizational theory and concepts, including organizational effectiveness, the Open Systems model and its components.

#### *3.1. Defining Nonprofit Organizations*

Nonprofit organizations are usually formed to meet a public need and are defined by several unique characteristics: they must be formal organizations, be formed independently, be self-governing, nonprofit distributing and benefit the public (Hatch, 1997). For the purpose of this study, a widely used definition of nonprofit organizations developed by the International Classification of Nonprofit Organizations (ICNPO) (in Banting and Hall, 1999) is used as a guideline. It states that nonprofit organization must be organized with a degree of organizational permanence, such as incorporation and regular meetings. It must also be private, that is separate from the government, but it can receive funding and/or sponsorship from the government. Also, nonprofit organizations must not return any profits generated to the owners or operators.

Nonprofits can generate revenue, but the excess must be used to fulfill the organization's mission or vision. The organization must be self-governing or equipped to control activities, with internal governance. They cannot be controlled by outside programs. Finally, the organization must have a significant degree of voluntary participation, either in program activities or in the management of affairs, i.e., housing intake counselors and board of directors.

According to this definition, all homesharing programs in Canada serving seniors are either nonprofit organizations or a program within a nonprofit organization. The term "organization" and "program" will be used synonymously when describing homesharing programs in Canada.

### ***3.2. What Affects Nonprofit Organization Survival?***

Bielefeld (1994) studied the mortality patterns of nonprofit organizations in Minnesota between 1980 and 1988 and Galaskiewick's (2000) longitudinal study examined nonprofit organizations over 15 years. Their major findings include the following: nonprofits ceasing in operation tend to be younger in age and had on average, fewer staff and employees than surviving programs (Bielefeld, 1994; Galaskiewick, 2000).

In Gutman and Doyle's 1989 study, the six closed programs were compared to the 19 surviving homesharing programs in Canada. Closed programs were found to have made fewer matches, they were more likely to be of intrinsic form and they offered fewer matching services and few additional services. Closed programs had fewer restrictions on client eligibility and they were less formal with regards to their record-keeping, governance and niche management (Gutman and Doyle, 1989).

One way to determine how surviving homesharing programs differ from closed programs is to measure and compare their program effectiveness. The following sections define program effectiveness as it relates to survival and describes the open model systems.

### **3.3. *Program Effectiveness***

According to the organizational theory literature, there is no one way to define organizational effectiveness. Generally, effectiveness can be defined by how well an program is meeting its goals (Hodge et al., 1996; Scott, 1998). There are many different ways to measure program effectiveness. The one best suited to the nonprofit sector is the open systems model and is used for the purpose of this study.

The open systems model views "organizations as being highly interdependent with their environments" (Scott, 1998: 345) and focuses on system control and feedback. An organization's ability to acquire information and resources and process them into outputs is what ensures its sustainability and effectiveness (Harrison and Shirom, 1999; Scott, 1998). Each of these three systems has merit. However, it appears that the Open Systems (OS) approach is best suited to measure organizational effectiveness in smaller, nonprofit organizations, such as homesharing programs, and was used for this purpose in this study.



### **3.3.1. Open Systems (OS) Approach: A Framework to Diagnose**

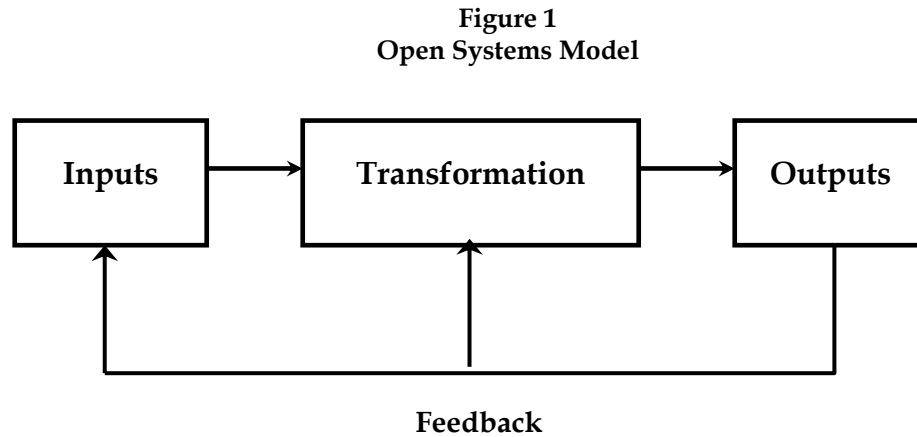
#### **Organizational Effectiveness**

The theory of organizational effectiveness, whereby organizations are seen as open systems, is well established in the literature (Harrison and Shirom, 1999; Hatch, 1997; Heffron, 1989; Salipante and Golden-Biddle; 195; Scott, 1998). The OS approach draws from the systems theory approach and stresses system control, feedback and the interdependence between organizations and their environments (Harrison and Shirom, 1999; Hatch, 1997; Heffron, 1989; Salipante and Golden-Biddle; 1995). The OS approach states that an organization constantly adapts to its environmental conditions. Organizations are entities or systems that acquire inputs and resources from their environment and transform them into outputs. An OS model best fits the nonprofit sector as these organizations constantly use their external environment for inputs, to give feedback when there is a change in their external environment and apply adaptive strategies to their internal environments in order to survive.

According to Harrison and Shirom (1999:41), the OS model is a good tool to "guide definition, data gathering, analysis and feedback" regarding an organization's effectiveness.

Two key features of the OS approach make it appropriate in determining organizational effectiveness in homesharing programs. The first is that survival of the organization depends on its ability to adapt to the changes in the external environment. Secondly, in order to adapt to these changes, the cyclical nature of the OS model demands a well-managed and effective internal environment (Harrison and Shirom, 1999; Ivancevich and Matteson, 1987).

Figure 1 takes the OS approach and provides a very simple framework<sup>4</sup> to describe the core elements of the open system: inputs, transformation, and outputs.



### **Inputs**

Inputs include various resources that an organization acquires from its external environment that influence the organization's ability to create an output, e.g., a product, service or program. The external environment refers to the environment outside of the organization, including the political, economic, social, cultural, technological and physical sectors. Often the external environment is examined to uncover the opportunities and the threats it presents to the organization. In the case of homesharing programs, opportunities and threats consist of securing funding and political support, human resources, developing community partnerships and attracting clientele (Boyd-Noel, 1994; Harrison and Shirom, 1999; Huffington et al., 1997; Gutman and Doyle, 1989; McNamara, 1996).

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<sup>4</sup> The OS framework in Figure 1 is a simplified version of the OS model depicted in Harrison and Shirom (1999), Scott (1998) and the United Way of America (1996).

## **Transformation**

The transformation or systems process is how an organization takes its inputs and turns them into outputs. The transformation or system process is often referred to as the internal environment and includes organizational motivation and organizational capacity. Organizations also apply adaptive strategies to the internal environment based on feedback. Organizational motivation includes mission and objectives while organizational capacity comprise strategic leadership, human resources, core resources and program and process management (Huffington et al., 1997; IDRC, 1996; McNamara, 1996). The transformation component also included accountability practices and the use of adaptive strategies include service cutbacks, increase staff workloads, pursuing new funding, merging, etc (Alexander, 2000; Bielefeld, 1994).

## **Outputs**

From the transformation stage, outputs are created, often termed the units of service (McNamara, 1996). For homesharing programs these include matchmaking services, referrals and counseling programs. One area of effectiveness is to measure the quantity and quality of the outputs, often referred to as outcomes. Performance outcomes are the quantifiable goals and for homesharing programs these are the number of clients served, the number of homesharing matches made during a period of time and the duration of these matches. Such data is often used to secure funding and to prove their organization's accountability (Huffington et al., 1997; McNamara, 1996; United Way of America, 1996). The "soft" or qualitative outputs for homesharing programs examine the perceived impact of their program including increasing

the availability of affordable housing options, reducing isolation and avoiding premature institutionalization.

### **Feedback**

A feedback loop is when the output of a system is used to regulate the input of a system, especially when a desired output is not achieved and the inputs and processes must be changed (Hodge et al., 1996; Tan, 1995).

### **3.3.2. Factors Influencing the Open Model Systems**

According to Tan (1995) and Hodge et al. (1996), an open model system is influenced by three factors: the external environment, human relations and internal efficiency. The literature on nonprofit organizations suggests that these external environmental factors are common to all organizations with similar services and serving similar target population (Alexander, 2000; Banting and Hall, 1999; Bush, 1992; Jacksonville, 1998; McMurry, Netting and Ketner, 1991; Netting and Williams, 1997). For the purpose of this study, the assumption was made that the external environment of all nonprofit homesharing programs was unstable and unpredictable. If all homesharing programs serving seniors were faced with similar threats and opportunities in their external environments, a "level playing field" was created among these Canadian organizations and was considered a constant.

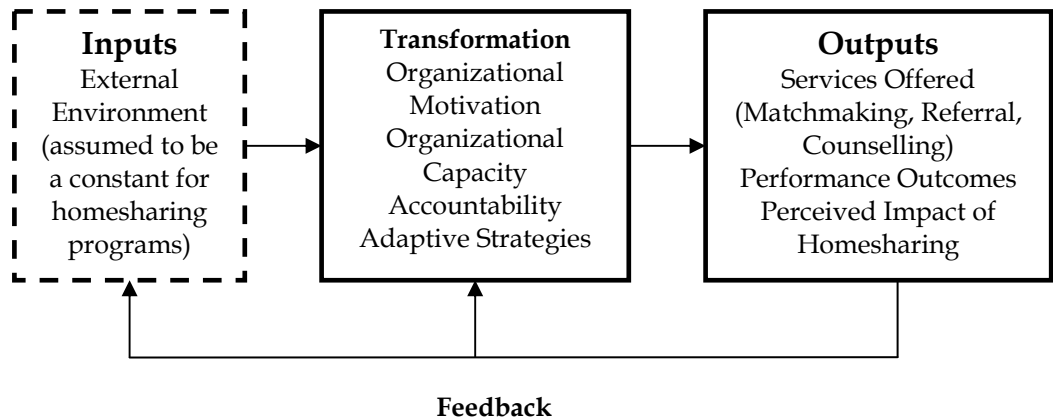
A human relations approach examines the emotional side of the organization, such as worker happiness, internal stress, etc whereas internal efficiency refers to the effectiveness of the internal environment of an organization (Hodge et al., 1996; Tan, 1995). Since homesharing programs were the unit of analysis, the human relations approach was not included in the

research. The focus of this study is only on those components directly related to the organizational structure and characteristics in the internal environment.

Figure 2 revisits the Open Systems Model and applies it to examine and compare organizational effectiveness in surviving and closed Canadian homesharing programs.

The next sections describe the four primary components measured in this study (organizational motivation and capacity, accountability and adaptive strategies) and where possible, review the findings from the two previous Canadian homesharing program studies. Neither the 1989 nor the 1994 studies directly examined the internal environment of homesharing programs in Canada. However, they did ask about many of the components of internal structure within their interviews.

**Figure 2**  
**OS Model: Homesharing Programs in Canada**



### 3.4. *External Environment*

As previously mentioned, based on the nonprofit literature, the external environment was assumed to be unstable and unpredictable for all homesharing programs in Canada. It was therefore not measured in the study and was considered a constant for the purposes of the open systems model.

### 3.5. *Organizational Motivation*

According to the nonprofit organizational literature, organizational motivation is comprised of mission and objectives (IDRC, 1996; McFarlane and Roach, 1999).

The mission statement answers the questions of why the organization exists, as well as whom and how it serves. Traditionally, having a clear and regularly updated mission is considered a vital aspect of organizational effectiveness (Heuer, 1999). Often, a written mission statement also includes the organization's objectives. Having well-defined and measurable objectives are an important aspect of organizational survival (Heuer, 1999; McFarlane and Roach, 1999; IDRC, 1996). They set "guidelines for members of the organization to follow... provide a rationale for the organization's existence...and set a standard against which the organization's performance can be measured (Hodge et al., 1996: 57).

While the previous studies found that not all homesharing programs had mission statements, all of the Canadian programs in operation in 1988 and 1993 had objectives (Boyd-Noel, 1994; Gutman and Doyle, 1989). The main objectives were: (1) to address a housing need, whether it be financial or to increase the availability of affordable housing options, (2) to relieve issues of isolation, companionship, and security in the home, (3) to enable individuals to remain independent in their own homes (aging in place), and (4) to provide a service to those in need.

### **3.6. Organizational Capacity**

Organizational capacity determines an organization's ability to transform its inputs into outputs and is crucial to an organization's performance, accountability and survival (Heuer, 1999; IDRC, 1996). It includes strategic leadership and core resources.

#### **3.6.1. Strategic leadership**

Strategic leadership is the process of setting clear goals and guiding the board of directors, staff and volunteers to fulfill the organization's objectives (Heuer, 1999; IDRC, 1996). Strategic leadership is also about the process of change and adaptation and includes the following components: strategic planning and governance.

#### **Strategic Planning**

In response to the external environment, organizations use a strategic plan to document specific goals, priorities and tactics that the organization proposes to use to meet its mission, objectives and performance outcomes. Successful strategic planning involves the board of directors, staff and volunteers (Fahey and Randall, 2001; IDRC, 1996; McNamara, 1996). The 1989 Canadian homesharing study found that about 47% of homesharing programs had a business plan and/or strategic plan.

#### **Governance**

As part of what constitutes a nonprofit organization, a voluntary board of directors must provide governance; that is, assist in defining a clear mission and

purpose for the organization and establishing a policy framework (Heuer, 1999; IDRC, 1996). A board of directors should have a good understanding of both the internal and external environment and acts in the best interest of the organization. A dedicated, committed and knowledgeable board is very influential in an organization's ability to survive (Heuer, 1999; IDRC, 1996; McFarlane and Roach). In 1989, almost 79% of the homesharing programs had either a board of directors or an advisory committee.

### **3.6.2. Core Resources**

The core resources of an organization include its technological resources, finances and management of these resources.

#### **Technology**

Technological resources include all the equipment an organization uses to function, including machinery, hardware and software. It is important that the technology of an organization match the work being done and that it is adapted to keep pace with emerging changes in the environment (Hodge et al., 1996; IDRC, 1996). In the 1989 study, only 21% of the programs had and used a computer.

### **3.7. Accountability**

Since funders and society often judge an organization by how accountable it is or how well it manages its services, accountability practices for nonprofit organizations are critical to their survivability (Alexander, 2000; IDRC, 1996; McFarlane and Roach, 1999; Miller, 1998). For the purpose of this study,



practices undertaken by homesharing programs to prove their accountability included three major components. The first was the completion of a needs assessment to determine what programs and/or services were needed for its clientele, or target population prior to starting operations. The second was monitoring their services: who is using their services, how often and their reasons. Thirdly, having a formal evaluation conducted on the program also an important aspect of accountability. The 1989 Canadian study found that 37% of homesharing programs had undergone an evaluation (Gutman and Doyle, 1989).

### **3.8. Adaptive Strategies**

The current literature found that surviving programs were more likely than closed programs to have applied a greater number of adaptive strategies, including: augmenting revenues, retrenchment strategies, service reductions, altering organizational domain, and strategies to acquire power over the external environment (Alexander, 2000; Bielefeld, 1994; Golensky and DeReuter, 1999; McMurtry, Netting and Ketner, 1991,).

Augmenting revenues includes such strategies as greater involvement from board members in fundraising, pursuing new funding opportunities, contracting with a fundraising firm and developing a for-profit subsidiary (Bielefeld, 1994; Liebschutz, 1992 in Alexander, 2000; McMurtry et al., 1991). Retrenchment strategies are primarily concerned with saving costs and include increasing workload, reducing staff, using more volunteers, and implementing or raising user fees (Bielefeld, 1994; Hadley and Culhane, 1993 in Alexander, 2000; McMurtry, et al, 1991). Decreasing services includes eliminating or shrinking services or programs, reducing outreach components and providing services on a first come, first served basis (McMurtry et al, 1991). Altering

organization domain encompasses merging with other organizations, consideration of terminating the organization, franchising one or more programs and/or becoming a franchise of a larger organization (Golensky and DeRuiter, 1999; McMurtry et al., 1991). Lastly, strategies to acquire power over the external environment comprise expanding networking with other organizations, restructuring the board, increasing the amount of time spent on making government contracts, and joining a voluntary association for lobbying and unified action (Alexander, 2000; McMurtry et al., 1991). Neither the 1989 nor the 1994 Canadian homesharing studies directly examined adaptation strategies.

### **3.9. *Outputs***

Outputs include the organization's services and/or product. In the case of homesharing programs, these include their services offered: matchmaking, referral and counselling services. A description of services offered by homesharing programs was provided in Chapter 2.

Additionally, measuring effectiveness includes quantifying and determining the quality of a program's outputs. For homesharing programs, the quantitative or performance outcomes are the number of clients served, the number of clients matched and the duration of matches during a one-year period.

The 1989 study did not directly measure client inquiries, but rather collected available data from 997 clients to provide client profiles. With respect to number of matches, Gutman and Doyle (1989) found that the number of matches made by the programs varied from zero to 339, with only 11-13% of the matches involving both home sharers being 55 years and over.

Boyd-Noel's study reported on the number of inquiries, interviews and matches made during the research period, 1992 to 1993. In 1992, the 17 Canadian programs then in operation, received a total of 17,639 inquiries in one year. The frequency of calls ranged from 152-3130 per year with a median of 433 (Boyd-Noel, 1994). The 17 programs conducted approximately 3575 interviews and approximately 600 matches were made with a clientele base of 1354, over the course of one year, indicating that 38% of clients interviewed were matched over the course of the research period (Boyd-Noel, 1994).

Regarding length and type of matches, Boyd-Noel found that in 1994, 29% of matches had endured over a year in length. In 1988 and in 1994, 36% and 37% of the matches were intergenerational, respectively (Boyd-Noel, 1994; Spence & Boyd, 1988, cited in Gutman and Doyle, 1989).

The second type of output refers to the more subjective or qualitative outcome of the services, i.e., the perceived impact of homesharing. These include increasing affordable housing options, avoiding institutionalization, increasing a sense of security and companionship, etc.

In 1989, 50% of the programs in operation felt that the impact of homesharing was small, but there was potential for a larger impact. About 17% felt they had made an impact by either assisting clients avoid premature institutionalization and/or by increasing the availability of affordable housing. 22% felt that homesharing made an impact on those individuals who prefer to stay in their own homes, but suffered from loneliness.

Boyd-Noel's 1994 study showed that almost 43% of programs felt that homesharing promoted aging in place and the avoidance of premature institutionalization. About 33% felt their programs impacted clients both by increasing housing options and by assisting their clients in finding affordable and good quality housing. 29% felt homesharing promoted increased use of

existing housing stock and 19% felt it assisted low-income people in need of housing.

### **3.10. *Feedback Loop***

The feedback loop provides information back to the beginning of the model, as the external environment is rarely placid. For example, if feedback gives the information that there was a decrease in clientele served and a decrease in matches made, the program may need to alter some processes to the internal environment. The program may need to revisit their mission statement and/or objectives, and/or target a more widespread clientele. Adaptations may be required, such as decreasing staff, reducing the number of services offered, etc. Feedback gives direct information to an organization on how to maintain its integrity and its ability to continue delivering its services effectively.

### **3.11. *Research Goals and Study Hypotheses***

Building on the two previous Canadian homesharing studies and on organizational theory, this study attempted to further determine how homesharing programs serving seniors in Canada survive. New areas examined in this study included a more focused approach to survival by examining components of the internal environment of homesharing programs. This included examining organizational motivation and capacity. Also, the area of adaptive strategies is introduced to better understand how homesharing programs alter their internal environments to face the changing demands of the external environment.

### **3.11.1. Research Goals**

The research goals were: (1) to examine the range of client services and operational characteristics of surviving homesharing programs in Canada and compare these findings with the results of the 1989 and 1994 Canadian Homesharing studies, and (2) to identify and describe those variables in the internal organizational environment most likely associated with a homesharing program's survival.

### **3.11.2. Hypotheses**

Based on findings from the two previous Canadian homesharing program studies and the literature on nonprofit organizations and its theory, the following hypotheses were tested:

***Ho1: Surviving homesharing programs will have more matchmaking and referral services for home sharers than closed programs.***

#### **Rationale**

Findings from Gutman and Doyle's 1989 study on homesharing found that closed programs offered fewer matchmaking and additional services. Based on these findings, it was hypothesized that surviving programs would offer more matchmaking and referral services.

***Ho2: Surviving homesharing programs are more likely than closed programs to have high organizational motivation and capacity.***

#### **Rationale**

Findings from Gutman and Doyle's 1989 study indicated that closed programs had fewer staff and volunteers and did not exhibit many of the

organizational motivation and capacity components identified in the literature on organizational effectiveness (see Heuer, 1999; IDRC, 1996; McFarlane and Roach, 1999; Salipante and Golden-Biddle, 1995). Based on these findings, it was expected that closed programs would not have as high organizational motivation or capacity as surviving programs.

***Ho3: Surviving homesharing programs will have more formal databases for accountability purposes than closed programs.***

#### Rationale

The recent nonprofit organizational literature suggests that accountability is become increasingly important for survival of nonprofit organizations. Also, findings from the 1989 Canadian homesharing studies found that few homesharing programs measured outcomes and conducted formal evaluations. Therefore, this directional hypothesis suggests that surviving programs would be more likely to measure performance outcomes and to have undergone formal evaluations when compared with closed programs.

***Ho4: Surviving homesharing programs will have applied a greater number of adaptive strategies than closed programs.***

#### Rationale

Based on literature on nonprofit morbidity (see Alexander, 2000; Bielefeld, 1994; Golensky and DeReuter, 1999; Netting and Williams, 1997; Salipante and Golden-Biddle, 1995) surviving organizations, among other factors, tended to use more adaptive strategies than organizations ceasing in operation. Therefore, this directional hypothesis was developed according to the results from this literature.

## Chapter 4

### Methods

This chapter describes the methods used to investigate the differences between and key characteristics of surviving and closed homesharing programs in Canada and to test the hypotheses developed in Chapter 3. The chapter begins with a description of the procedures used in attempting to identify all homesharing programs serving seniors currently in operation. Recruitment of participants for in-depth follow up is then discussed. Attention turns next to research instruments, measurement and assumptions.

#### 4.1. *The Search for Programs Currently in Operation*

Between August 2000 and October 2000, an attempt was made to contact all homesharing programs identified in the two previous studies, i.e., Gutman and Doyle (1989) and Boyd-Noel (1993) to determine their status of operation. Additionally, housing registries, Ontario "Community Partners" organizations<sup>5</sup> and provincial Ministries of Housing were contacted to seek out Canadian homesharing programs serving seniors established since 1993.

Based on findings from this search and the two previous Canadian studies, Table 1 (page 14 ) shows the history of homesharing programs in Canada by province, period of establishment and period of closure. Since 1980, there have been 35 homesharing programs established in Canada. Most (20) were located in Ontario, followed by Quebec (7). Just over 70% (25 of 35 programs)

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<sup>5</sup> Community Partners organizations provide information and resources on various social and human services in Ontario.

were established between 1980 and 1988, seven were established between 1989 and 1993 and the only programs to be formed since 1994 have been two in Alberta and one in British Columbia.

#### **4.2. *Recruiting Participants for In-Depth Follow-Up***

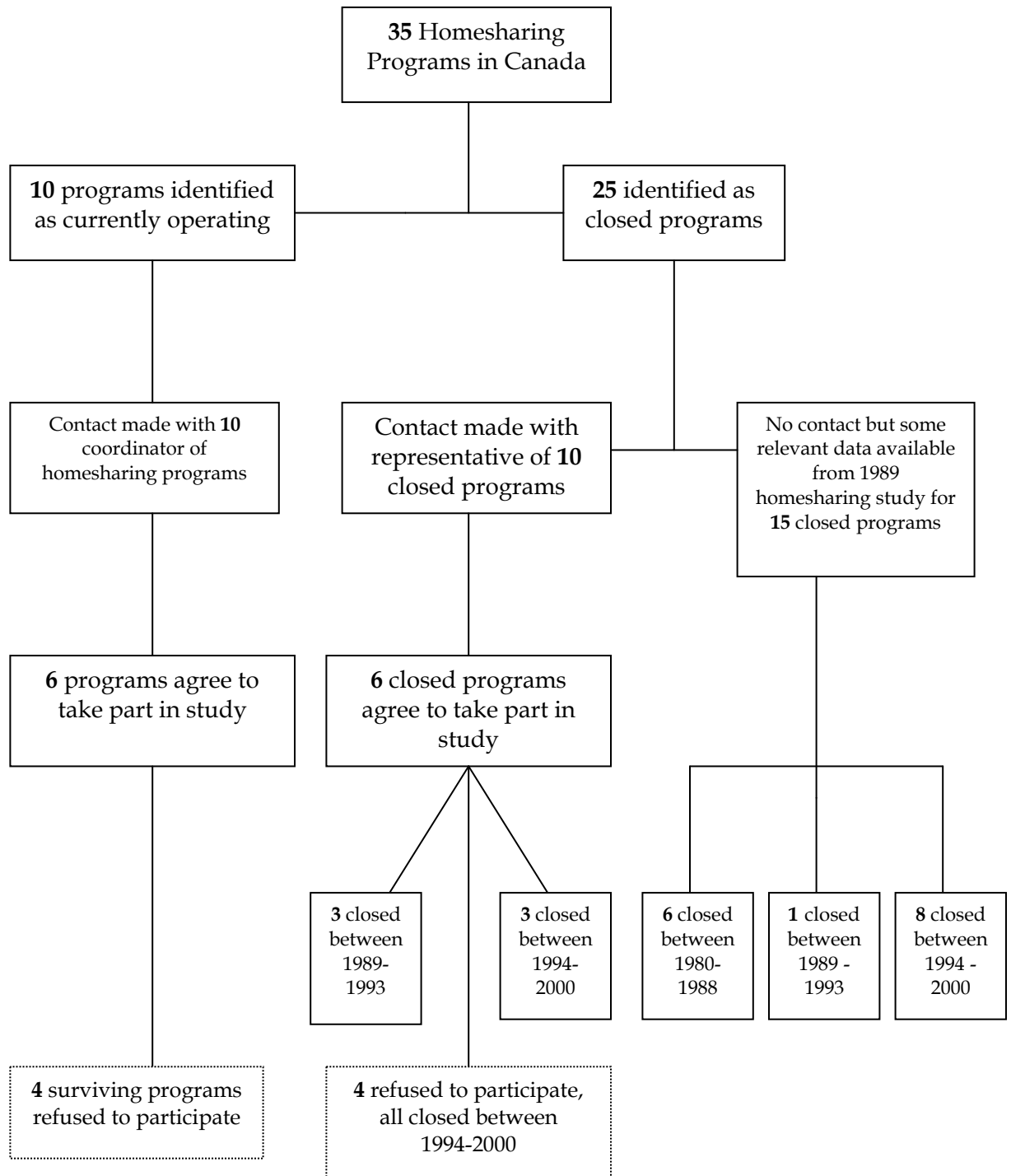
At the time the present study was conducted only 10 of the 35 homesharing programs were in operation. Of these, six were in Ontario, two were in Quebec, one was in BC and one was in Alberta. A one-page questionnaire was faxed to all 10 of the surviving homesharing programs (see Appendix A). A program coordinator or representative was asked to answer three questions regarding the organization's homesharing program: (1) its status, (2) if in fact it still served seniors, and (3) if it was a nonprofit organization. All were subsequently contacted by telephone and invited to participate in a research project (i.e., the in-depth follow-up).

Of the 25 closed homesharing programs, a potential contact point or person could only be identified for 10, nine of which were established after 1993 and one of which was established between 1989-1993. Only six operating and six closed programs opted to participate in the in-depth follow-up, which was described as being designed to examine homesharing program characteristics and the internal environment of the program.

Figure 3 provides an overview of the outcome of the recruiting process for the in-depth follow-up. It also shows the period in which closure took place for the six closed programs that took part in the in-depth follow-up, for the 15 for whom some data relevant to the in-depth follow-up were available from the 1989 study, and for the eight which refused to participate and for which only minimal relevant data were available.



**Figure 3 -- Recruitment Process for In-Depth Follow-Up Participants and Data Sources**



#### **4.3. *Procedure for In-depth Follow-up***

In February of 2001, the coordinator or representative of each of the 12 programs participating in the in-depth follow-up received a study packet that included a brief description of the study, a consent form and a stamped self-addressed envelope (see Appendix B for a full copy of the study packet and consent form). Each was contacted by telephone two weeks from the post-marked date of the study packet to confirm their willingness to participate in the study. After receiving written consent, each was mailed a questionnaire for completion. Additionally, a telephone interview was conducted with the six surviving homesharing programs. The written questionnaire for the surviving and closed programs took approximately 45 minutes to complete and the telephone interviews with representatives of the surviving programs ranged from 25 to 50 minutes.

#### **4.4. *Research Instruments***

##### **4.4.1. Surviving Homesharing Programs Questionnaire**

This written questionnaire contained 83 items and included a blend of questions from the 1988 Homesharing Telephone Questionnaire (Gutman and Doyle, 1989), the 1993 Telephone Questionnaire (Boyd-Noel, 1994) and several new questions addressing the internal environment of the program and the use of adaptive strategies. Items from the 1988 and 1993 questionnaires asked about the general characteristics of the program such as its geographic location, year established and lifespan, catchment population, form, objectives, target population and restrictions, matchmaking and other services offered. New questions pertained to the internal environment, such as the organizational

motivation and capacity, performance outcomes and the use of adaptive strategies.

It should be noted that the written questionnaire included items which required little expansion, e.g. background information on the program, questions requiring only a "yes" or "no" response, statistical information on program outcomes, etc. The telephone interview was designed to elicit more detailed response and explanation (Appendix C includes a copy of the full questionnaire and telephone interview).

#### **4.4.2. Closed Homesharing Programs Questionnaire**

The written questionnaire for closed programs was similar to that used for surviving programs. The main difference was that questions for the closed programs were directed at past activities and general and organizational characteristics of their programs. Also, there was no section on performance outcomes or client outcomes. Questions on performance outcomes were not included in the questionnaire as it was felt that this type of data would not be available from the closed programs. Also, there were no questions on client restrictions as a result of an error on the part of the researcher (See Appendix D for a full copy of the closed program questionnaire).

#### **4.4.3. Pre-Test Questionnaire**

The written questionnaire for surviving homesharing programs was pre-tested on five homesharing programs in the United States and England. The questionnaire was pre-tested with these international programs due to the small number of surviving programs in Canada and the need to preserve them for the main study. The pretest was conducted to detect and correct errors or problems

concerning ease of comprehension, readability, organization and suitability of questions (McAuley, 1989; Windsor, Baranowski, Clark and Cutter, 1994).

#### **4.5. Measurement**

This section describes the variables examined and the statistics chosen for descriptive purposes and to test the hypotheses.

##### **4.5.1. Dependent Variable**

The key dependent variable in this study was the status of homesharing programs: surviving or closed. Lifespan was also considered a dependent variable and was measured by calculating the life (in years) of homesharing programs and was used in the survival analysis.

##### **4.5.2. Independent Variables**

Tables 2, 3 and 4 present a summary of the independent variables examined in this study. Due to data limitations, three levels of analysis were conducted. Measurement of three variables were conducted on all 35 Canadian homesharing programs (25 closed programs and 10 surviving programs). The second level of analysis included 27 programs (21 closed programs and 6 surviving programs) for 15 variables, including testing of the first hypothesis. The last level of analysis included 12 programs (6 closed programs and 6 surviving programs) for 20 variables and testing of the remaining three hypotheses.

Table 2 shows those variables that were available for all 35 Canadian homesharing programs. Table 3 outlines the variables available for the 6

surviving programs participating in the in-depth follow-up and for 21 closed programs. The closed programs used in this portion of the analysis were the 6 closed programs included in the in-depth portion of this study and 15 from the 1989 study for which some relevant data were available. Table 4 shows those variables that were included in the in-depth follow-up portion of this study. As can be seen, the variables in Table 2 focus on some of the general characteristics of the homesharing programs. These independent variables, available for all 35 established homesharing programs, used data from the two previous homesharing studies as well as from the present study.

**Table 2**  
**Independent Variables Available for All 35 Homesharing Programs**

Geographic distribution, by province
Catchment population
Lifespan, in years

### **Geographic Distribution and Catchment Population**

Geographic distribution was measured by determining the city and province in which the homesharing programs were found. Catchment population was measured by the size of the population being served by the program. The two previous studies on homesharing programs found that the majority of programs were located in Ontario in communities with catchment populations of 250,000 and over.

## **Lifespan**

Lifespan was measured by calculating the life (in years) of the homesharing programs. Lifespans for surviving programs were calculated until the year 2000. The organizational literature shows that surviving organizations tend to have longer lifespans than closed organizations, although it is highly unlikely that lifespan causes survival. It was included as an independent variable to see if the literature on nonprofit organizational survival supported findings from this study. As previously mentioned, lifespan is also included as a dependent variable for the survival analysis portion of this research.

Variables shown in Table 3 include client restrictions, target population, form, niche management, components of organizational motivation (objectives) and organizational capacity (niche management, leadership, core resources, human resources), services offered and components of accountability: needs assessment and evaluation.

**Table 3**  
**Independent Variables Available for 6 Surviving and 21 Closed Homesharing Programs**

Client restrictions
Target population
Form
Niche management
<u>Organizational Motivation</u>
Objectives
<u>Organizational Capacity</u>
Use of computer in everyday activities
<u>Accountability</u>
Conducted a needs assessment
Had a formal evaluation of program
<u>Outputs: Services Offered</u>
Average number of matchmaking services
Average number of referrals
Average number of counseling services

### **Client Restrictions**

Client restrictions were measured by calculating the number of and the type of restrictions each program had for its clients. The two previous studies have shown that homesharing programs with a higher number of client restrictions were less likely to survive than those programs with fewer client restrictions.

### **Target Population**

When homesharing programs were asked what their primary target populations were, they could choose from: no target population, well older persons, frail elderly, single parent families, persons with disabilities, university students and newcomers to Canada. The two previous homesharing studies showed that programs having several target populations increased the probability of making matches and overall survival.

### **Form**

The literature suggests that homesharing programs can either be intrinsic, interdependent and independent in their form depending on their organizational dependence. The two previous studies have shown that the majority of programs are either interdependent or independent; few were of the intrinsic form. If the homesharing program is offered within a multi-service organization with its own staff designated to the program, it is considered interdependent. If the program is offered within a department and a staff person is freed up partially from their other duties for homesharing services, the program was considered intrinsic. If the homesharing program is the only service offered by an organization, the program is considered to be independent.

### **Niche Management**

Measurement of this variable included asking programs to record their methods of advertising. The two previous studies showed that the most common advertising techniques were radio/television, flyer distribution, local newspaper, posters in the community, outdoor/bus advertisements, direct mailing, telephone, community information displays, press release and word of mouth.

### **Organizational Motivation**

#### *Objectives*

The two previous studies showed that the four most common objectives of homesharing program were to increase affordable housing, relieve isolation, enable seniors to live independently, and to offer services to seniors or others in need. Measurement of this variable included asking programs to report the objectives of the homesharing program and to rank their importance. Since the objectives of a program are linked to target population and niche management, it was included to see if significant differences existed between the surviving and closed programs.

### **Organizational Capacity**

#### *Technology*

Technology was measured by asking homesharing programs to report if they used a computer in their daily operations and whether or not their current level of technology was sufficient to meet their needs as an organization. The literature on organizational effectiveness indicates that using technology, such as computers, in every day operations is important for survival.



## **Accountability**

This variable was measured by asking surviving and closed programs if they conducted a needs assessment prior to operation and if a formal evaluation was conducted to see if there were differences between accountability practices between surviving and closed programs.

## **Outputs**

### *Services Offered*

The variable services offered was broken down into three separate variables: matchmaking, referral and counselling services. This was done in order to calculate the overall number of individual services offered by the program as well as to measure the type of services being offered. In order to detect differences in services between surviving and closed programs, only the similar type of services offered in the three categories in 1989 and 1994 were measured. For matchmaking, each service was dichotomized (yes/no) and they included 10 different types of services. They included interviewing with each client, conducting in-depth home interviews, reference checks (medical and personal), viewing the home provider and/or the home seeker's dwelling, signing of disclaimer, referral of home sharers to each other, attending the interview between potential home sharers, providing sample home sharers agreement and assisting in the drawing up of the agreement. Types of referral by homesharing programs were dichotomized (yes/no) and included up to 11 and were made to medical services, seniors centres, drug and alcohol counseling, financial management, home care agencies, income assistance, social workers, education/employment centres and credit/financial management. Types of counseling services offered by the programs were dichotomized and included interpersonal skills, other housing options and community services. The 1989

Canadian study found that surviving programs were more likely to have a higher number of matchmaking, counseling and referral services when compared with closed programs.

Variables in Table 4 focus on in-depth questions about the internal environment of the 6 surviving and 6 closed programs in this study.

**Table 4**  
**Independent Variables Available For In-depth Follow-up**  
**(6 Surviving and 6 Closed Homesharing Programs)**

<p><b>Other Components of Organizational Motivation</b></p> <ul style="list-style-type: none"><li>Does the program have a mission statement?</li><li>Is the mission statement updated regularly?</li><li>Do staff and board identify with mission?</li></ul>
<p><b>Other Components of Organizational Capacity</b></p> <ul style="list-style-type: none"><li>Program has a strategic plan</li><li>Board members involved in the development of strategic plan</li><li>Board members support the strategic plan</li><li>Staff support strategic plan</li><li>Concerned about recruiting effective board members</li><li>New orientation for board members</li><li>Board members are skilled in nonprofit governance</li><li>Board completely understands importance of the external environment on Organization</li><li>Board restructured in past five years</li><li>Rigorous regarding governance</li></ul>
<p><b>Accountability</b></p> <ul style="list-style-type: none"><li>Tracked number of client inquiries</li><li>Tracked number of matches</li><li>Tracked duration of matches<sup>6</sup></li></ul>
<p><b>Adaptive Strategies</b></p> <ul style="list-style-type: none"><li>Average number of adaptive strategies</li></ul>
<p><b>Outputs: Performance Outcomes</b></p>
<p><b>Outputs: Perceived Impact of Homesharing Program</b></p>

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<sup>6</sup> This category only included the surviving homesharing programs (N=6).

### *Other Components of Organizational Motivation*

This variable was measured by examining the objectives of the organization. Dichotomous variables (yes/no) comprised whether or not the organization had a mission statement and if the mission statement was updated regularly. When programs were asked how well the staff and board identified with the mission, they answered using a Likert Scale (a lot, somewhat, not at all). The literature shows that programs with a mission statement that is regularly updated and staff that identify with the mission, are more apt to survive than programs that don't (Heuer, 1999; Jacksonville, 1998).

### *Other Components of Organizational Capacity*

The organizational effectiveness literature suggests that a high organizational capacity is a desirable trait for survivorship. Dichotomous variables (yes/no) comprised whether or not the organization had a strategic plan, if it was updated, if the board and staff were included in its development, if the program was concerned about recruiting board members, if an orientation was given to new board members, if board is knowledgeable regarding nonprofit governance and if the leader of the organization is a professional. All positive answers to these questions were associated with a high level of organizational capacity.

### *Adaptive Strategies*

This variable was measured by asking programs to report which adaptive strategies they had used in the last two years, including augmenting revenues, strategies to increase productivity, retrenchment strategies and acquiring power over the environment. There were a total of 22 possible adaptive strategies and each one was dichotomized (yes/no). From this information, the overall number

of adaptive strategies used was calculated for the surviving and closed programs. As previously mentioned the literature on organizational survival shows that surviving programs tended to use more adaptive strategies than closed programs.

*Outputs: Performance Outcomes*

Measuring performance outcomes included number of matches, duration of matches (in months) and the type of matches (rent only, rent plus exchange, intergenerational, both home sharers 55 years and over, etc). This variable was included to see if outcomes differed between surviving and closed programs.

*Outputs: Perceived Impact of Homesharing Program*

The two previous studies showed that the perceived impact of homesharing programs included that it was small impact, but the potential was there, increases housing options/availability of housing units, offers companionship and sense of security to clients, helps people waiting for nonprofit or institutional placement and assists low income people in need of housing. This variable was included in this study to see if differences existed between surviving and closed programs.

#### 4.6. *Assumptions*

It was recognized that the following assumptions potentially introduced error into the results of this study. However, review of the literature lends support to including these assumptions into the design of the study.

##### 1. External Environment

The assumption was made that the external environment is unpredictable and unstable for all homesharing programs across Canada. This creates a "level-playing field" and allows the study to examine the differences in the internal environment and use of adaptive strategies of homesharing programs.

##### 2. Funding

This assumption is an extension of the previous one, as the external environment provides funding to nonprofit organizations. It was assumed that funding is unstable and unpredictable for all homesharing programs across Canada. It was also assumed that the individual budgets for surviving homesharing programs would not be significantly different.

##### 3. Multi-service organizations versus stand-alone homesharing organizations

It was assumed that the internal environments for multi-service organizations offering homesharing and for stand-alone homesharing organizations would not be significantly different.

#### 4. Survival

Survival is defined as the ability of an organization to adapt its internal structures and maintain delivery of its services and programs in concordance with shifts in the external environment. Survival is measured by organizational effectiveness, perceived success and cost effectiveness. Although it is to their benefit, organizations do not have to be cost effective or successful in order to survive in the nonprofit sector. Therefore, it is assumed that organizational effectiveness is the most important aspect of survival.

## Chapter 5

### Results

This chapter starts off with a description of the data analysis of this study followed by the results. The first section of the results describes geographic distribution, catchment size and lifespan of the 10 surviving and 25 closed homesharing programs. This is succeeded by a description of selected general characteristics (form, target population, client restrictions, niche management and services offered), by some components of organizational motivation and capacity (governance and core resources) as well as accountability (needs assessment and evaluation). For some of the variables, sufficient data were available from the present and two prior studies to allow comparison between six surviving programs and 21 closed programs. More in-depth detail is provided throughout the chapter by the twelve programs that completed the questionnaire designed specially for this study. Results relating to the four hypotheses are highlighted throughout the chapter.

#### *5.1. Data Analysis*

Basic descriptive statistics were computed for data collected from the study participants as well as for data from the 1989 and 1994 studies. In order to determine statistically significant differences between surviving and closed programs, selected independent variables were chosen and appropriate tests were employed to establish differences in means (unpaired t-test) as well as to calculate the level of association between the dependent and independent variables (bivariate analysis). A summary of the statistical measures used in this study is shown in Table 5.

### **5.1.1. Unpaired T-Test**

Unpaired t-tests were used to measure the difference in means for several variables. These included: catchment, number of advertising techniques, number of matchmaking, counseling and referral services, organizational motivational and capacity scale, number of staff and volunteers and number of adaptive strategies. The unpaired t-test was chosen for its ability to detect statistically significant differences in means for small samples. Since the t-test assumes normal distribution of the variables being tested, the Kolmogorov and Smirnov test was conducted on each variable to ensure normality.

### **5.1.2. Mann-Whitney U Test**

The Mann-Whitney U test was used for only one variable: lifespan. This test is used for variables that do not assume a normal distribution and is the nonparametric equivalent of the t-test. When lifespan was tested for normality, it did not pass the Kolmogorov and Smirnow test, demonstrating that the surviving and closed homesharing programs did not have the same standard deviation. Since the unpaired t-test assumes similar variances for two populations, it could not be used with lifespan. The Mann-Whitney was therefore applied to examine lifespan when comparing surviving and closed programs.

### **5.1.3. Bivariate Analysis**

Bivariate analyses on the dependent variable of interest -- survival -- were used to determine statistically significant differences in the independent variables, including objectives, client restrictions, matchmaking services,



counseling and referral services, advertising, sponsorship, organizational motivation and capacity, and the accountability variables. Bivariate analyses are used to explain direction and magnitude of association between surviving and closed programs and the independent variables tested. Associations found between the dependent and independent variables were described using Pearson's r and Kendall's Tau, for those variables including the 6 surviving and 21 closed programs. To measure the magnitude, correlation coefficients (from -1.0 to +1.0) are used to explain if the association is weak (0.0 to 0.2), moderate (0.2 to 0.4) and moderate to strong (0.4 and over). Regarding significance level, an alpha level of .05 was used to protect against a Type I error (accepting a false conclusion) rather than a Type II error (rejecting a true conclusion) (Wister and Carriere, 1999). When testing variables including the 6 surviving and 6 closed programs, the Fisher's Exact Test, or F-test, was used and as it is best suited to determine statistically significant variances in smaller samples.

**Table 5**  
**Statistical Tests and Variables Used to Compare Surviving and Closed Programs**

<b>Statistical Measure</b>	<b>Variables</b>
Unpaired T-Test	<ul style="list-style-type: none"> <li>• Mean number of matchmaking service</li> <li>• Catchment size</li> <li>• Mean number of counseling services</li> <li>• Mean number of referral services</li> <li>• Mean number of advertising techniques</li> <li>• Mean number of staffing</li> <li>• Mean volunteer hours</li> <li>• Mean number of adaptive strategies</li> <li>• Mean score for organizational motivation and capacity scale</li> </ul>
Mann-Whitney U Test	<ul style="list-style-type: none"> <li>• Lifespan</li> </ul>

<b>Statistical Measure</b>	<b>Variable</b>
Bivariate Analysis	<ul style="list-style-type: none"> <li>• Objectives</li> <li>• Target population</li> <li>• Client restrictions</li> <li>• Variables comprising organizational motivation and capacity (see Table 4)</li> <li>• Accountability</li> </ul>
Kaplan-Meier Survival Analysis <sup>7</sup>	<ul style="list-style-type: none"> <li>• Organizational motivation and capacity (high versus low)</li> <li>• Services offered (high versus low matchmaking and referral)</li> <li>• Accountability (yes versus no)</li> <li>• Adaptive strategies (high versus low)</li> </ul>

## 5.2. *General Description of Homesharing Programs in Canada*

### 5.2.1. Geographic Distribution and Catchment Size

#### **Geographic Distribution**

Table 7 shows the geographic distribution, lifespan and catchment size of all 35 homesharing programs established in Canada since 1980. Of the three programs established in British Columbia, one remains. It is located in New Westminster. The two closed programs were located in White Rock and in Vancouver. Alberta was host to three programs; one remains in operation and is located in Edmonton. The two closed programs were located in Calgary and Edmonton, respectively. Manitoba's sole program, now closed, was located in Winnipeg. In Ontario, a total of 20 programs were established, six of which are still in operation in East York/Flemingdon, Scarborough, North York, Etobicoke,

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<sup>7</sup> The Kaplan-Meier Survival Analysis is described in the further detail in Chapter 5.

Windsor, and York. The 14 closed programs were located in a variety of communities as listed in Table 7. Quebec has been home to seven homesharing programs. The two surviving programs are located outside of Montreal; one in Jonquiere and the other in Gatineau. Four of closed programs were located in Montreal and one in Riviere de Loup. In the more eastern part of Canada, one program was established and since closed in Dartmouth, Nova Scotia.

### Catchment Size

Table 6 shows there was no significant difference in population size of catchment areas when the 10 surviving programs were compared with the 23 closed programs ( $t=.135$ ,  $df=1$ , ns).

**Table 6**  
**Catchment Size and Lifespan**  
**(All 35 Homesharing Programs)**

Variable	Category	Surviving (N=10)	Closed (N=25)
Catchment Size (Population of catchment area)	Mean	461,554	486,223
	SD	526,706	464,497
	Range	56,503 - 1,831,665	17,210 - 1,831,665
Lifespan (years)	Mean	10.1	4.66
	SD	5.07	2.46
	Range	0.5 - 15	0.5 -10

**Table 7**  
**Geographic Distribution**  
**(All 35 Homesharing Programs)**

Variable	Category	Surviving (N=10)		Closed (N=25)	
		N	%	N	%
Geographic Distribution (by city and province)	<b>British Columbia</b>				
	Vancouver	0	0	1	4
	White Rock	0	0	1	4
	New Westminster	1	10	0	0
	Total	1	10	2	8
	<b>Alberta</b>				
	Edmonton	1	10	1	4
	Calgary	0	0	1	4
	Total	1	10	2	8
	<b>Manitoba</b>				
	Winnipeg	0	0	1	4
	Total	0	0	1	4
	<b>Ontario</b>				
	Sudbury	0	0	1	4
	Niagara	0	0	1	4
	Toronto	0	0	1	4
	Ottawa	0	0	1	4
	East York/Flemingdon	1	10	0	0
	Scarborough	1	10	0	0
	Peterborough	0	0	1	4
	York	1	10	0	0
	Sault Ste Marie	0	0	1	4
	North Bay	0	0	1	4
	London	0	0	1	4
	Kitchener	0	0	1	4
	Etobicoke	1	10	0	0
	North York	1	10	0	0
	Windsor	1	10	0	0
	Brant	0	0	1	4
	Brockville	0	0	1	4
	Cambridge	0	0	1	4
	Hamilton	0	0	1	4
	Peel/Halton	0	0	1	4
	Total	6	60	14	56
	<b>Quebec</b>				
	Montreal	0	0	4	16
	Riviere de Loup	0	0	1	4
	Jonquiere	1	10	0	0
	Gatineau	1	10	0	0
	Total	2	20	5	20
	<b>Nova Scotia</b>				
Dartmouth	0	0	1	0	
Total	0	0	1	4	
<b>TOTAL</b>		<b>10</b>	<b>100</b>	<b>25</b>	<b>100</b>

Table 8 shows that a crosstabulation using population size as the independent variable shows no statistically significant differences between the surviving and closed programs (Tau c=.44, ns). This suggests that population size does not seem to impact the likelihood of a program's survivability.

**Table 8**  
**Population Size in Surviving and Closed Programs**

Population Size	Surviving (N=10)		Closed (N=23 <sup>8</sup> )	
	N	%	N	%
100,000 or less	1	10	6	26.1
100,001 - 300,000	4	40	3	13.0
300,001 - 500,000	1	10	4	17.4
500,001 - 700,000	3	30	4	17.4
700,001 and over	1	10	6	26.1

Tau c = -.44, ns

### **5.2.2. Year established and lifespan<sup>9</sup>**

Seven of the 10 surviving programs were established between 1985 and 1988 (three in 1985, two in 1987 and two in 1988), two programs opened between 1989 and 1993 (one in 1989 and one in 1993) and one program was established in 1998. Of the 25 closed programs, six closed between 1980 and 1988 (one in 1983, two in 1986 and three in 1988), four closed between 1989 and 1993 (one in 1989 and one in 1992 and two of the programs' closure dates were not available). For the 15 programs that closed between 1994 and 2000, one closed in 1994, one in 1995 and one in 1999 (the other 11 program closure dates are not known,

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<sup>8</sup> Population sizes for two cities could not be found in the 1996 Census data, N=23

<sup>9</sup> Since closure dates for 13 of the 25 closed programs were not known, the research estimated the dates of closures based on the political and economic literature available. Of those programs closing between 1989 and 1993, a median date of 1991 was chosen as the date of closure. For those programs closing between 1994 and 2000, the year of 1996 was chosen as a closure date. This was the year after the funding cut by the Liberals and most of the programs closing were in Ontario during this time.

however, the research on the political environment in Ontario supports the probability that the majority of them closed around 1996, after the Ontario government cut funding to those organizations providing non essential services). The average lifespan for surviving programs was significantly longer than for closed programs. As can be seen in Table 6, the mean lifespan of surviving programs is 10.1 years and approximately 4.7 years for closed programs (Mann-Whitney  $U = 55.5, p < .01$ ).

### ***5.3. Additional General Characteristics of Homesharing Programs and Selected Organizational Components***

Table 9 shows select information on the variables analyzed for the 6 surviving and 21 closed homesharing programs. These include other general characteristics of programs (form, target population, client restrictions, niche management, services offered) and others concentrate on the organizational components of homesharing programs (objectives, strategic plan, governance, core resources, and needs assessment and evaluation). Additionally, information from the in-depth follow-up from the six surviving and six closed programs is reported on those select variables included in this section.

**Table 9**  
**Additional General Characteristics of Homesharing Programs and Selected**  
**Organizational Components**  
**(6 Surviving and 21 Closed Homesharing Programs)**

Variable	Category	Surviving N=6		Closed N=21		
		N	%	N	%	
<b>General Characteristics</b>						
Form <sup>10</sup>	Intrinsic	0	0.00	2	9.50	
	Interdependent	5	83.3	8	38.1	
	Independent	1	16.7	11	52.4	
Target Population	Frail elderly	3	50.0	4	19.0	
	Well older persons	1	16.7	18	85.7	
	Single parent	4	66.7	5	23.8	
	University students	2	33.3	4	19.0	
	Persons with disability	4	66.7	3	14.3	
	Newcomers to Canada	3	50.0	1	4.76	
	Low income singles	1	16.7	2	9.50	
Client Restrictions <sup>11</sup>	Age	0	0.00	9	60.0	
	Geographic location	2	33.3	11	73.3	
	Ability to take care of themselves	5	83.3	7	46.6	
	Religious/cultural affiliation	0	0.00	1	6.67	
	Household type	1	16.7	1	6.67	
	Mental health	2	33.3	8	53.3	
	Drug/Alcohol abuse	3	50.0	11	73.3	
	Financial	1	16.7	1	6.67	
	Criminal record	2	33.3	2	13.3	
<b>Organizational Motivation</b>						
Objectives	Provide affordable housing	4	33.3	19	90.5	
	Keep older persons independent	3	50.0	9	42.9	
	Provide services to persons in need	1	8.3	10	47.6	
	Relieve isolation	1	8.3	16	76.2	
<b>Organizational Capacity</b>						
<b>Strategic Plan</b>	Program has a strategic plan	6	100	10	47.6	
<b>Governance</b>	Board of directors	6	100	13	62.0	
	Advisory committee	0	0.00	4	9.0	
	No board of directors	0	0.00	4	9.0	
<b>Niche Management</b> (Average number of advertising techniques)	Mean	5.83		4.48		
	SD	1.72		1.99		
	Range	0-9		0-9		
<b>Core Resources</b>	Technology	Use of computer in everyday activities	4	66.7	13	61.9
<b>Accountability</b>	Needs Assessment and Evaluation	Conducted needs assessment	2	33.3	10	47.6
		Had formal evaluation	1	16.7	12	57.1

<sup>10</sup> One missing case, N=26

<sup>11</sup> Due to an error on the part of the research, data on client restrictions was only available from those closed programs from the 1989 study, N=21

Variable	Category	Surviving (N=6)		Closed (N=21)	
		N	%	N	%
<b>Services Offered</b>					
Matchmaking	Mean	3.67		7.95	
	SD	1.03		1.67	
	Range	0-10		0-10	
Counseling	Mean	1.60		2.72	
	SD	1.14		0.67	
	Range	0-3		0-3	
Referral	Mean	8.00		4.28	
	SD	1.00		1.18	
	Range	0-11		0-11	

### 5.3.1. Form

As shown in Table 10, there was no statistically significant difference between the form of surviving and the closed programs (Chi-Square = 4.784,  $p < .09$ ). It is interesting to note that of those programs initiated since 1993 none were of the intrinsic form. Most homesharing programs currently in operation are offered within a department or as a separate program within a multi-service organization.

**Table 10**  
**Program Form in Surviving and Closed Programs**

Form	Surviving (N=6)		Closed (N=21)	
	N	%	N	%
Intrinsic	0	0	2	9.5
Interdependent	5	83.3	7	33.3
Independent	1	16.7	12	57.1
Total	6	100	21	100

Chi-Square= 4.784, ns



### **5.3.2. Target Population**

When asked about their primary target population, four (66.7%) of the six surviving programs answered single parent families and university students. 50% of the programs reported that well older persons (55 years and over) and newcomers to Canada were their target population. By comparison, Table 11 presents the differences in target population for the 21 closed homesharing programs. 86% of the closed programs answered that their primary target population was well elderly persons, aged 55 years and over. 24% targeted both single parent families and university students and 19% targeted frail elderly persons.

When each of the target populations were dichotomized (yes/no) and crosstabulated with program status (surviving/closed), it was found that surviving programs were significantly less likely than closed programs to target well older persons for their service (Pearson  $r=-.567$ ,  $p<.01$ ). It was also found that surviving programs were significantly more apt than closed programs to target persons with disabilities (Pearson  $r=.497$ ,  $p<.01$ ) and newcomers to Canada (Pearson  $r=.529$ ,  $p<.01$ ). Surviving programs were also significantly more likely than closed programs to target single parents as their target population (Pearson  $r=.378$ ,  $p<.05$ ).

**Table 11**  
**Target Populations of Surviving and Closed Homesharing Programs+**

Target Population	Surviving (N=6)		Closed (N=21)		Pearson r
	N	%	N	%	
Frail elderly	3	50.0	4	19.0	.294 ns
Well older persons (55 yrs +)	1	16.7	18	85.7	-.567**
Single parent	4	66.7	5	23.8	.378*
University students	2	33.3	4	19.0	.143 ns
Persons with disabilities	4	66.7	3	14.3	.497**
Newcomers to Canada	3	50.0	1	4.76	.529**
Low income singles	1	16.7	2	9.52	.189 ns

+Multiple Answers Permitted

\*p<.05, \*\*p<.01, ns = not significant

### **5.3.3. Client Restrictions**

Five (83.3%) of the six surviving programs reported that both home providers and home seekers had to have the ability to take care of themselves and half of the programs would not match home providers or home seekers with drug and/or alcohol abuse problems. 50% indicated a restriction of both a criminal record and a mental health disability. By comparison, the listed restrictions in Table 12 differ slightly for closed programs. Most evident is the restriction for age that closed programs enforced. 60% of the closed participating programs indicated that one of the home sharers had to be 55 years and 73% placed restrictions on geographic location.

When each restriction was dichotomized (yes/no), and a bivariate analysis conducted using programs status (surviving/closed), it was found that surviving programs were significantly less likely than closed programs to have age restrictions (Pearson  $r = -.548$ ,  $p < .01$ ).

**Table 12**  
**Client Restrictions for Surviving and Closed Homesharing Programs+**

Client Restrictions	Surviving (N=6)		Closed (N=21)		Pearson r
	N	%	N	%	
Age	0	0.00	9	60.0	-.548*
Geographic location	3	50.0	11	73.3	-.067 ns
Ability to take care of themselves	5	83.3	7	46.6	.335 ns
Religious/cultural affiliation	0	0.00	1	6.67	-.141 ns
Household type	2	33.3	2	13.3	.141 ns
Mental health	2	33.3	8	53.3	-.181 ns
Drug/Alcohol abuse	3	50.0	11	73.3	-.224 ns
Financial	1	16.7	1	6.67	.354 ns
Criminal record	2	33.3	2	13.3	.230 ns

+Multiple Answers Permitted

\*p<.01, ns = not significant

#### **5.3.4. Niche Management**

As shown in Table 13, surviving homesharing programs promoted their services largely by word of mouth and by a local newspaper. Five (83.3%) of the surviving programs used both radio/television and flyer distribution. Three (50%) used posters in the community, community information displays, and press releases. Closed programs used similar advertising techniques as the surviving programs. Twenty (95.2%) of the 21 of the closed participating programs marketed their services by means of a local newspaper/newsletter and 17 (76.1%) used both the radio/television and flyer distribution as an avenue to market their program. Fourteen (66.7%) and 13 (61.9%) of the participating closed programs used word of mouth and community posters, respectively. Less utilized marketing methods for both surviving and closed programs included outdoor/bus advertisements, direct mailing, and telephone.

When each advertising techniques was dichotomized (yes/no), and cross tabulated with status of program (surviving/closed), it was found that surviving

programs were more likely than closed programs to use community information displays (Pearson  $r=.434$ ,  $p<.05$ ).

To detect differences between surviving and closed programs and average number of advertising techniques, all the individual methods of advertising were combined to create a scale with a highest possible score being 10. There was no statistically significance between the mean number of advertising techniques for surviving and closed programs. The survivor group had an average of 5.83 advertisement techniques and the closed programs had a mean of 4.48 ( $t=1.504$ ,  $df=24$ , ns).

**Table 13**  
**Niche Management for Closed and Surviving Homesharing Programs+**

Type of Advertisement	Surviving (N=6)		Closed (N=21)		Pearson r
	N	%	N	%	
Radio/Television	5	83.3	16	76.1	.071
Flyer distribution	5	83.3	16	76.1	.071
Local newspaper/newsletter	6	100	20	95.2	.189
Posters in the community	4	66.7	13	61.9	.082
Outdoor/Bus advertisement	0	0.00	5	23.8	-.255
Direct mailing	1	16.7	0	0.00	.367
Telephone	1	16.7	4	19.0	-.025
Community information displays	4	66.7	4	19.0	.434*
Press release	3	50.0	3	14.3	.357
Word of mouth	6	100	14	66.7	.255

+Multiple Answers Permitted

\* $p<.05$

### **5.3.5. Select Organizational Motivational Variables**

#### **Objectives**

Increasing affordable housing was a primary objective of four (33.3%) of the six surviving participating programs. 50% also indicated that enabling older people to remain independent in the community was a primary objective. As shown in Table 14, while the most common primary objective for closed

programs was to increase affordable housing (90.5%), the second most common was relieving isolation for older persons (76.2%).

When each variable was dichotomized (yes/no) and cross-tabulated with status of program (surviving/closed), it was found that surviving programs were significantly less likely than closed programs to consider relieving isolation as one of their primary objectives (Pearson  $r = -.512$ ,  $p < .01$ ).

**Table 14**  
**Primary Objective of Surviving and Closed Homesharing Programs+**

Objective	Surviving (N=6)		Closed (N=21)		Pearson r
	N	%	N	%	
Affordable housing	4	66.7	19	90.5	-.279 ns
Keep older persons independent	3	50.0	9	42.9	.06 ns
Providing services to those in need	1	16.7	10	47.6	-.262 ns
Relieve isolation	1	16.7	16	76.2	-.512*

+Multiple responses permitted

\*  $p < .01$

In support of the above findings, when in the in-depth follow-up, the programs were asked to rank the importance of their objectives, 83.3% (5) of the surviving programs ranked affordable housing as their first or second most important objective. Among the closed programs, 66.7% reported that their most important objective was to increase the supply of affordable housing. Half of the closed programs also indicated that relieving problems of isolation for older people was either their first or second most important objective.

### 5.3.6. Select Organizational Capacity Variables

#### **Strategic Plan**

All six surviving programs and 10 (47.6%) of the 21 closed programs indicated having a strategic plan<sup>12</sup>. Surviving programs were significantly more likely than closed programs to have a strategic plan (Pearson  $r=.443$ ,  $p<.05$ ).

#### **Type of Governance**

When type of governance was crosstabulated with status of program (Table 15), no statistically significant difference was found between surviving and closed programs (Chi-Square=3.248, ns).

**Table 15**  
**Type of Governance, Surviving and Closed Homesharing Programs**

Type of Governance	Surviving (N=6)		Closed (N=21)	
	N	%	N	%
Board of Directors	6	100	13	62.0
Advisory Committee	0	0.00	4	19.0
No Board of Directors	0	0.00	4	19.0

Chi-Square = 3.248, ns

#### **Technology**

Four (66.7%) of the six participating surviving programs used technology in its every day operations as did about 62% of the closed programs. A cross-tabulation of technology did not show a statistical significance between surviving and closed programs (Pearson  $r=.041$ , ns). In the in-depth follow up,

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<sup>12</sup> In the 1989 Homesharing study, programs were asked if they had a business plan. It was assumed that a business plan was similar to a strategic plan.

programs were asked to comment on the program's level of technology and if it was suitable for its operations. 66.7% of the surviving participating programs felt it was and two of the programs indicated they would like to see more technology included in the day-to-day operations. All of the six surviving programs felt that staff was proficient using technology as part of the day to day operations of the program.

### **5.3.7. Accountability: Needs Assessment and Evaluation**

Two (33.3%) of the six surviving programs and 11 (52.3%) of the 21 closed programs conducted a needs assessment prior to delivering their services. There was no statistical significance for this variable when it was cross tabulated with program status (Pearson  $r=-.120$ , ns).

Regarding evaluation, surviving programs were less likely than closed programs to evaluate their programs. One (16.7%) of the six surviving programs compared with 12 (57.1%) of 21 had their homesharing program formally evaluated. A bivariate analysis showed the difference to lack statistical significance (Pearson  $r=.337$ ,  $p<.08$ ).

### **5.3.8. Outputs: Services Offered**

#### **Matchmaking**

All of the surviving and closed programs were considered to be a "referral and counselling" model, which is they offered services beyond exchanging phone numbers between potential home providers and home seekers. As shown in Table 16, when each individual matchmaking service was crosstabulated with program status, it was found that surviving programs were significantly less likely than closed programs to conduct in-depth home interviews (Pearson  $r=-$

.780,  $p < .001$ ), do medical reference checks (Pearson  $r = -.410$ ,  $p < .05$ ), do personal reference checks (Pearson  $r = -.434$ ,  $p < .05$ ), view homeprovider's home (-.463,  $r < .01$ ), view home seekers home (Pearson  $r = -.378$ ,  $p < .01$ ), attend introductions between home sharers (-.555,  $p < .01$ ), and assist in drawing up home sharers agreement (-.663,  $p < .001$ ).

**Table 16**  
**Matchmaking Services Offered by Surviving and Closed Homesharing Programs+**

Service	Surviving (N=6)		Closed (N= 21 )		Pearson r
	N	%	N	%	
Interview each client	6	100	21	100	---
Conduct in-depth home interviews	2	33.3	21	100	-.780***
Reference checks					
Medical	0	0.00	10	47.6	-.410*
Personal	2	33.3	17	80.9	-.434*
View home provider's home	1	16.7	15	71.4	-.463**
View home seeker's home	0	0.00	9	42.9	-.378*
Signing of disclaimer	4	66.7	15	71.4	-.043 ns
Referral of home sharers to each other	3	50.0	18	85.7	-.357 ns
Attend introductions between potential clients	0	0.00	14	66.7	-.555**
Provide sample home sharers agreement	3	50.0	17	80.9	-.294 ns
Assist in drawing up home sharers agreement	2	33.3	20	95.2	-.663***

+Multiple Answers Permitted

\* $p < .05$ , \*\* $p < .01$ , \*\*\* $p < .001$ , ns = not significant

### Referral and Counselling

Five (83.3%) of the six surviving programs and 18 (85.7%) of the 21 closed programs offered both referral and counselling services. All six surviving and 21 closed programs offered the counselling services, but one of the six surviving and three (14.3%) of the 21 closed programs did not refer clients to other community organizations. As shown in Table 17, when all of the counseling variables (housing options, community services, and interpersonal skills for homesharing) were dichotomized (yes/no) and crosstabulated with program status (surviving/closed), it was found that surviving programs were less likely



than closed programs to counsel clients on community services (Pearson  $r=-.586$ ,  $p<.01$ ) as well as on interpersonal skills for homesharing (Pearson  $r=-.647$ ,  $p<.001$ ).

When each of the referral variables were dichotomized (yes/no) and crosstabulated with program status (surviving/closed), it was found that surviving programs were more likely than closed programs to refer clients: for legal advice (Pearson  $r=.462$ ,  $p<.05$ ), to seniors centres (Pearson  $r=.722$ ,  $p<.001$ ), and for education and/or employment services (Pearson  $r=.744$ ,  $p<.001$ ).

**Table 17**  
**Counselling and Referral Services Offered by Surviving and Closed Programs+**

Type of Service	Surviving (N=6)		Closed (N=21)		Pearson r
	N	%	N	%	
<b>Counseling</b>	<b>6</b>	<b>100</b>	<b>21</b>	<b>100</b>	
Housing options	4	66.7	14	66.7	-.036 (ns)
Community services	3	50.0	18	85.7	-.586**
Inter-personal skills for homesharing	1	16.7	16	76.2	-.647***
<b>Referral of Services</b>	<b>5</b>	<b>83.3</b>	<b>18</b>	<b>85.7</b>	
Legal	5	100	8	44.4	.462*
Medical	2	40.0	7	38.9	.009 (ns)
Income assistance	5	100	12	66.7	.313 (ns)
Other housing services	5	100	15	83.3	.204 (ns)
Seniors centers	5	100	3	16.7	.722***
Drug/Alcohol centre	3	60.0	5	27.8	.279 (ns)
Social worker	3	60.0	12	66.7	-.058 (ns)
Home support agencies	2	40.0	4	22.2	.167 (ns)
Education/Employment	4	80.0	1	5.56	.744***
Family/Personal counselling	3	60.0	6	33.3	.225 (ns)
Credit/Financial management	3	60.0	4	22.2	.114 (ns)

+Multiple answers permitted

\* $p<.05$ , \*\* $p<.01$ , \*\*\* $p<.001$ , ns = not significant

### Hypothesis 1

Surviving homesharing programs will have more matchmaking, referral and counseling services for home sharers than closed programs.

In order to test this hypothesis, individual variables from each type of services were added together to create a separate scale for matchmaking, referral and counseling. The maximum score for matchmaking was 10, 11 for referral and three for counseling. It was expected that surviving homesharing programs would have more matchmaking, referral and counseling services. As shown in Table 18, the unpaired t-tests found support for one variable, referral. Surviving programs were more likely than closed programs to refer clients ( $t=6.411$ ,  $df=24$ ,  $p<.001$ ). Average referrals made by surviving programs were 8.0 and 4.28 for closed. However, there was an unexpected finding regarding the relationship between homesharing program status and matchmaking services and counseling. Surviving programs were less likely than closed programs to offer more matchmaking services ( $t=6.632$ ,  $df=24$ ,  $p<.001$ ) and counseling services ( $t=2.835$ ,  $df=24$ ,  $p<.01$ ). The average number of matchmaking services offered by surviving programs was 3.67 and 7.95 for closed programs and the average number of counseling services was 1.6 for surviving and 2.72 for closed programs.

**Table 18**  
**Means for Services Offered for Surviving and Closed Programs**

Variable	Surviving (N=6)		Closed (N=6)		T value, df
	Mean	S.D.	Mean	S.D.	
Matchmaking	3.67	1.43	7.95	1.03	$t=6.632^{**}$ , $df=24$
Counselling	1.60	1.14	2.72	0.67	$t=2.835^*$ $df=24$
Referrals	8.0	1.00	4.28	1.18	$t=6.411^{**}$ , $df=24$

Unpaired T-test, \* $p<.01$ , \*\* $p<.001$ , ns=not significant

#### 5.4. *Internal Environment Characteristics*

This section presents results for the remaining internal environment variables for surviving and closed programs. It includes results from the in-depth follow up for the six surviving and six closed programs. Table 19 presents variables for organizational motivation and capacity. It summarizes variables comprising organizational motivation and capacity. All 15 are shown to show which variables make up the organizational motivation and capacity scale created to test the second hypothesis. However, results for only those variables in **bold** are given in this section. For organizational motivation, they are mission and for organizational capacity, they are strategic planning, recruitment of and orientation for board members, perceived level of governance skill, and rigorous regarding governance, rigorous regarding personnel, have a website and rigorous managing budget. Following this section, results regarding outcomes and adaptive strategies are given.

**Table 19**  
**Organizational Motivation and Capacity**  
**(6 Surviving and 6 Closed Programs)**

Variable Grouping	Surviving N=6		Closed N=6	
	N	%	N	%
<u>Organizational Motivation</u>				
*Program has a mission statement	6	100	5	83.3
*Mission is updated regularly	5	83.3	3	50.0
*Staff and Board identify with mission	6	100	5	83.3
<u>Organizational Capacity – Strategic Planning</u>				
*Program has a strategic plan	6	100	6	100
*Board members involved in the development of strategic plan	6	100	2	33.3
*Board members support the strategic plan	5	83.3	4	66.7
*Staff support strategic plan	4	66.7	6	100
*Concerned about recruiting effective board members	5	83.3	4	66.7
*New orientation for board members	4	66.7	4	66.7
*Board members are skilled in nonprofit governance	2	33.3	3	50.0
*Board completely understands the importance ext. environment on organization	1	16.7	4	66.7
*Board restructured in past 5 years	2	33.3	2	33.3
*Rigorous regarding governance	5	83.3	6	100
<u>Organizational Capacity – Core Resources</u>				
*Use computers in every day operations	4	66.7	5	83.3
*Have web site	0	0.00	0	0.00
<b>Overall Capacity Score</b>	Mean	10.2	Mean	9.5
	SD	1.94	SD	2.51
	Range	8-13	Range	7-13

#### 5.4.1. Organizational Motivation

##### **Mission**

As shown in Table 20, no statistical significance was found for the three organizational motivation variables.

**Table 20**  
**Organizational Motivation**

Variables	Surviving (N=6)		Closed (N=6)		Relative Risk
	N	%	N	%	
Does the program have a mission statement?	6	100	5	83.3	.45, ns
Is the mission statement updated regularly?	5	83.3	3	50.0	2.5, ns
Do staff and board identify with mission?	6	100	5	83.3	.45, ns

\*F-Test, ns = not significant

## 5.4.2. Organizational Capacity

### **Strategic planning**

As shown in Table 21, there was no statistical significance when the three variables of strategic planning were crosstabulated with program status.

**Table 21  
Strategic Planning**

Variables	Surviving N=6		Closed N=6		Relative Risk
	N	%	N	%	
Board members support the strategic plan a lot	5	83.3	5	83.3	1.0, ns
Staff support the strategic plan a lot	4	66.7	6	100	0.45, ns
Board members are very involved in development of strategic plan	4	66.7	2	33.3	2.0, ns

\* F-Test, ns=not significant

### **Governance**

Table 22 shows no statistical significance for the six variables of governance (recruitment and orientation of board members and board restructuring, perceived governance skill of board, rigorous regarding governance).

**Table 22  
Governance**

Variables	Surviving (N=6)		Closed (N=6)		Relative Risk
	N	%	N	%	
Very concerned about recruiting effective board members	5	83.3	4	66.7	1.67, ns
Orientation for new board members					
Board restructuring in the past 5 years	4	66.7	4	66.7	1.00, ns
Board members very skilled in nonprofit governance	2	33.3	3	50.0	0.7, ns
Board completely understands importance of environment and its influences on programs	1	16.7	4	66.7	0.28, ns
Rigorous regarding governance	2	33.3	2	33.3	1.00, ns
	5	83.3	6	100	1.00, ns

\* F-Test, ns=not significant

### **Web Site**

None of the six surviving or six closed programs had a web site.

## Hypothesis 2

Surviving homesharing programs are more likely than closed programs to have high organizational motivation and capacity.

In order to test this hypothesis, individual variables for both organizational motivation and capacity were added to create a scale with a maximum possible score of 15. For example, having a mission statement, updating it regularly and having staff and board identify with the mission, would each be given a score of one. The mean for the organizational motivation and capacity scale for the surviving group was 10.2 and 9.5 for the closed group. An unpaired t-test confirmed no statistical significance for the organizational motivation and capacity variable ( $t=.5147$ ,  $df=10$ , ns).

Table 23 summarizes those variables measured for accountability and for adaptive strategies.

**Table 23**  
**Select Variables for Accountability and Adaptation Strategies**  
**(6 Surviving and 6 Closed Homesharing Programs)**

Variable Grouping	Category	Surviving N=6		Closed N=6	
		N	%	N	%
Accountability	Formal Evaluation of program	1	16.7	5	83.3
	Actively measures outcomes	6	100	5	83.3
	Monitors number of client inquiries	3	50.0	6	100
	Monitors number of matches made	3	50.0	N/A	
	Monitors duration of matches	3	50.0	N/A	
Accountability Scale	Mean	1.50		2.50	
	SD	0.84		0.84	
	Range	0-3		0-3	
Adaptive Strategies	Mean	7.33		4.33	
	SD	3.83		4.18	
	Range	3-12		1-11	

### 5.4.3. Accountability

#### **Monitoring Practices**

As shown in Table 24, there were no statistically significant differences in the types of monitoring practices between surviving and closed programs.

**Table 24**  
**Monitored Outcomes for Surviving and Closed Programs**

Variable	Surviving Programs (N=6)		Closed Programs (N=6)		Relative Risk
	N	%	N	%	
Number of people inquiring about home sharing/ month	3	50.0	6	100	0.33, ns
Reasons for their inquiries	3	50.0	5	83.3	0.5, ns
Number of interviews conducted/month	3	50.0	5	83.3	0.5, ns
Number of people registered and the number actually matched	3	50.0	6	83.3	0.33, ns
Reasons for not choosing homeshare	3	50.0	4	66.7	0.71, ns

\*F-Test, ns = not significant

#### **Hypothesis 3**

Surviving homesharing programs will have more formal databases for accountability purposes than closed programs.

In order to test this hypothesis, three variables (conducted a needs assessment, formal evaluation and measurable outcomes) were added to create an accountability scale with a highest possible score of 3. It was expected that surviving programs would have more accountability practices than closed programs. In fact, the opposite was found; surviving programs were less likely than closed programs to have more accountability practices in place. There was a difference between the two groups approaching statistical significance. The average number of accountability for surviving programs was 1.5 and 2.50 for closed programs ( $t=2.062$ ,  $df=5$ ,  $p<.06$ ).

#### 5.4.4. Adaptive Strategies

There were no statistically significant differences between the two groups when a bivariate analysis was conducted on each of the individual adaptive strategies. As shown in Table 25 the most widely used strategy by surviving programs (83.3%) was expanding networking with other agencies/organizations and increasing efforts to gain media attention to increase charitable donations (83.3%). The two most widely used adaptive strategies by participating closed programs were exploring new grant funding (83.3%) opportunities and appealing to new funding sources (66.7%).

**Table 25**  
**Adaptive Strategies Used by Surviving and Closed Programs +**

Adaptive Strategy	Surviving (N=6)		Closed (N=6)		Relative Risk
	N	%	N	%	
<b>Augmenting Revenues</b>	<b>5</b>	<b>83.3</b>	<b>5</b>	<b>83.3</b>	<b>1.0, ns</b>
Implemented or increased client fees	0	0.00	1	16.7	00. ns
Increased efforts to gain media attention	5	83.3	2	33.3	3.6, ns
Appealed to new funding sources	2	33.3	4	66.7	0.5, ns
Conducted special fundraising efforts	2	33.3	0	0.00	2.5, ns
Increased board members participating in fundraising	1	16.7	0	0.00	2.2, ns
Explored new grant funding opportunities	2	33.3	5	83.3	0.36, ns
<b>Adaptation to Unexpected Expenses/Funding Reductions</b>	<b>3</b>	<b>50.0</b>	<b>2</b>	<b>33.3</b>	<b>1.4, ns</b>
Initiated or increased staff training efforts	2	33.3	1	16.7	1.5, ns
Increased staff workloads	3	50.0	2	33.3	1.4, ns
Increased reliance of volunteers	1	16.7	1	16.7	1.0, ns
Computerized record keeping to reduce personnel costs	2	33.3	1	16.7	1.5, ns
Eliminated or shrunk service	1	16.7	0	0.00	2.2, ns
Reduced outreach	2	33.3	1	16.7	1.5, ns
Provided Services on a first-come first-served basis	3	50.0	1	16.7	2.0, ns
<b>Strategies to Acquire Power over the Environment</b>	<b>5</b>	<b>83.3</b>	<b>3</b>	<b>50.0</b>	<b>2.5, ns</b>
Expanded networking with other agencies	5	83.3	2	33.3	3.6, ns
Restructured board to recruit new and knowledgeable inds.	4	66.7	1	16.7	2.8, ns
Increased time making government contacts	2	33.3	3	50.0	0.7, ns
Joined a voluntary association for lobbying and unified action	1	16.7	1	16.7	1.0, ns
<b>Other Strategies</b>	<b>3</b>	<b>50.0</b>	<b>1</b>	<b>16.7</b>	<b>2.0, ns</b>
Added membership to organization	2	33.3	0	0.00	2.5, ns
Added new services and populations	1	16.7	0	0.00	2.2, ns
Added new management practices	0	0.00	1	16.7	0.0, ns
Added new marketing strategy	1	16.7	0	0.00	2.2, ns
Added new technology	3	50.0	0	0.00	3.0, ns

+Multiple responses permitted

\* F-Test, ns = not significant



#### **Hypothesis 4**

Surviving homesharing programs will have applied a greater number of adaptive strategies than closed programs.

This hypothesis was tested by adding all of the individual adaptive strategies to create a scale with a highest possible score of 22. Surviving programs were significantly more likely than closed programs to use more adaptive strategies ( $t=5.139$ ,  $df=10$ ,  $p<.001$ ). The average number of adaptive strategies used in the past two years by surviving programs was 8.3 and the average number used by closed programs two years prior to closing was 4.0 strategies.

#### **5.5. *Outputs***

This section is divided into the two parts. First, results are given for the performance outcomes, including number of clients inquiring about homesharing, number of matches made and duration of those matches are given followed by the results for the qualitative aspect of homesharing, that is the perceived impact of the homesharing in Canada.

##### **5.5.1. Performance Outcomes**

With respect to matches<sup>13</sup>, the average number of matches for surviving programs was significantly higher than for closed programs. The mean number

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<sup>13</sup> Number of matches was the only available variable from the 1989 study. Duration of matches and type could not be located at the time of the study.

of matches in one year for surviving programs was 81.8 and 11.7 for closed programs ( $t=5.516$ ,  $df=18$ ,  $p<.001$ ).

In 1999, surviving programs registered between 37 and 259 clients for the homesharing programs, with an average of 132. Dividing the average number of matches with the average number of clients registered calculates the percentage of registered clients that were matched. In 1999, approximately 62% of registered clients were matched in a homesharing agreement. The duration of matches in 1999 ranged from 3 months to a year, with an average of 8 months.

When asked what type of matches were being made by the program, surviving programs indicated that almost 100% were “rent only”, i.e., no service exchange component. One surviving program indicated that 2-3% of their matches were “service exchange plus rent”, 2-3% of all matches involved two homesharers 55 years and over, and approximately 60% of matches were intergenerational.<sup>14</sup>

### **5.5.2. Perceived Impact of Homesharing Programs**

Surviving programs were more likely than closed programs to assist low-income people in need of housing. Four (66.7%) of the six surviving programs compared with zero of the closed programs reported that their program assisted low income people in need of housing. As shown in Table 26, a bivariate analysis showed the difference to lack statistical significance ( $r=4.0$ ,  $p=.06$ ).

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<sup>14</sup> Five of the six surviving programs did not track type of matches.

**Table 26**  
**Perceived Impact of Homesharing Programs +**

Perceived Impact	Surviving (N=6)		Closed (N=6)		Relative Risk
	N	%	N	%	
Increases housing options/availability of housing units	4	66.7	1	16.7	2.8, ns
Offers companionship and sense of security to clients	1	16.7	1	16.7	2.8, ns
Assists low income people in need of housing	4	66.7	0	0	4.0, p=.06
Helps people waiting for non-profit or institutional placement	2	33.3	0	0	2.5, ns
The impact of homesharing is small, but the potential is there	1	16.7	4	66.7	0.5, ns

+Multiple answers were allowed

\* F-test, ns = not significant

### 5.6. *Survival Analysis*

A problem that arises when comparing the surviving and the closed homesharing programs is that the surviving programs have a differentiated risk of closure. Recently established and surviving program may close in the near future. In order to deal with the issue of risk exposure, it is necessary to use survival analysis. The Kaplan-Meier Survival Analysis estimates survival rates using time, event and presence of censored cases.

In this case, the model allowed for comparison of overall survival rates between the surviving and closed homesharing programs using lifespan (the number of years in existence) as the time, program closure as the event, and surviving programs as the censored cases. The length of time of operation for open programs is therefore only used until the survey date, at which point they are censored from the analysis. By dichotomizing organizational motivation and capacity, services offered, accountability and adaptive strategies into “high and low” or “yes and no” variables, the Kaplan-Meier Survival Analysis was able to estimate whether lifespan was a predictor of organizational survival. For services offered, it was possible to conduct a survival analysis for the six surviving programs and 21 closed programs participating in the in-depth follow-

up. Survival analysis for organizational motivation and capacity, accountability and adaptive strategies could only be measured for the six surviving and six closed programs participating in the study.

### **5.6.1. Organizational Motivation and Capacity**

This variable was dichotomized based on scores obtained from the organizational motivation and capacity scale created for the second hypothesis. A median split was not used in this case, as all programs had scores higher than 7. The median of this variable was 11 and used for the survival analysis. The mean lifespan for programs with high organizational motivation and capacity was 11.67 years and 12.51 for programs with low organizational motivation and capacity. The Log Rank Test showed no statistically significance between the two groups (Log Rank Test = 0.34, df=1, ns).

### **5.6.2. Accountability**

A dichotomous variable was created from the accountability scale used to measure the third hypothesis. The variable's median of 2 was used to split the new variable into a high/low status. Programs with high accountability had a score of 2 or higher and those with low had a score of less than two. The mean lifespan for programs with high accountability was 7.27 years and 14.0 years for surviving programs. There was no statistically significant differences in lifespan for high and low accountability (Log Rank Test = 2.35, df=1, ns).

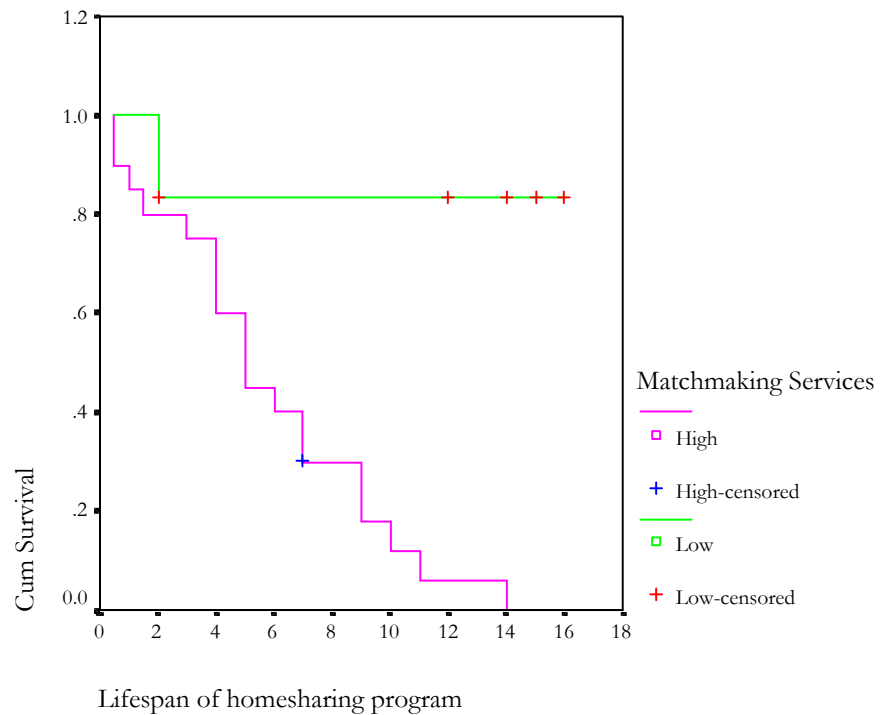
### **5.6.3. Adaptive Strategies**

Using the mean for the number for adaptive strategies used by homesharing programs, a dichotomous (high/low) variable was created. Programs using 5 or more adaptive strategies were considered as high and those using less than five were considered low. The average lifespan for programs using high adaptive strategies was 13.25 years and 8.0 years for programs using a low number of adaptive strategies. The Log Rank Test showed no statistical significant difference between the two groups (Log Rank Test = 1.54, df=1, ns).

### **5.6.4. Matchmaking Services**

The matchmaking services variable was dichotomized into a high/low variable using a median split. Those programs offering 5 or more matchmaking services were considered high and those offering 4 or less were considered low. The mean survival time for programs offering a low number of matchmaking services was significantly longer at 13.67 years when compared to 5.86 years for those programs offering a higher number of matchmaking services (Log rank test = 8.68, df=1, p<.01). Figure 4 shows the survival curve for homesharing programs using matchmaking services as the independent variable and lifespan as the dependent variable. The top line in the graph shows the cumulative survival for programs with the low matchmaking services; it plateaus around 0.8. Programs with high matchmaking services have a decline in cumulative survival. The (+) sign indicates the censored cases.

**Figure 4**  
**Matchmaking**



### **5.6.5. Referrals**

The variable referral was created by dichotomization using a median split. Programs referring clients to six or more of their referral agencies were considered high and those referring clients to fewer than six were considered low. Mean lifespan for high referral programs was 8.57 and 6.67 for low referral programs. The log rank test showed no statistically significant differences for high and low referral programs (Log Rank Test = 0.42, df=1, ns).

### **5.6.6. Counseling**

Programs with high counseling were those offering two or more services and low counseling including programs offering between 0 and 1 services. There was no statistically significant difference between the mean lifespan for high

counseling, (6.33 years) and the mean lifespan for low counseling programs (9.13 years) (Log Rank Test = 1.95, df=1, ns).

## Chapter 6

### Discussion

This chapter begins by summarizing the range of client services and operational characteristics of surviving homesharing programs in Canada and comparing them to the two previous studies in 1989 and 1994. Secondly, it identifies those variables in the internal environment associated with a program's survival. Attention then turns to how the study findings relate to the literature on the Open Systems (OS) model and to those key factors associated with a homesharing program's ability to survive in the nonprofit sector. The limitations of the study are then discussed and suggestions for further research are proposed.

#### *6.1. Comparison of 1989, 1994 and 2000 Study Findings*

To better understand how surviving homesharing programs have changed since the original study (1989), this section provides a summary of the evolution of the six surviving programs in this study. This was achieved by examining the surviving programs characteristics at the time of the 1989 and 1994 Canadian studies. Prior to describing these changes, the following explanation regarding the relevancy of the comparison of the 1989, 1994 and 2000 study findings is warranted. When this study first began, the researcher was not cognizant of the large number of closed programs (15) and the small number of established programs (3) in Canada since 1994. Since there are only 10 homesharing programs serving seniors remaining, it is of very little value to



compare the six participating surviving programs with the 1989 and 1994 study findings. Essentially it would be similar to comparing the surviving and closed programs. Also, because the entire data set was not available from 1989 and 1994 studies, comments are made based on general changes as per the previous Canadian studies and were not empirically tested. However, there are some findings that are relevant to the evolutionary changes of surviving programs from 1989 to 2000, which are discussed in following sections. They are geographic distribution, lifespan, target population and client restrictions, form and specific components of organizational motivation and performance outcomes.

#### **6.1.1. Geographic Distribution**

As per the 1989 and 1994 studies, the majority of homesharing programs are still found in Ontario and Quebec. Noteworthy is the fact that since 1994, provinces east of Quebec no longer offer homesharing programs.

#### **6.1.2. Lifespan**

The most interesting finding relating to lifespan is that seven of the 10 surviving programs were established in the first wave, i.e., 1980-1988. Two were established in wave two, (1989-1993) and one in wave three (1994 - 1999). This suggests that these seven surviving programs have been and are able to continuously manage their internal environments to meet the changes in the external environment for at least 12 years. Based on the nonprofit organizational literature, there could be one of two explanations. It could be that surviving programs have evolved to a higher level of organizational capacity or they have employed a number of adaptive strategies in order to create a balance internally

to meet the demands of the external environment (Heuer, 1999; Netting and Williams, 1997). Since there was little or no difference in organizational capacity when surviving and closed programs were compared, it can be surmised that the surviving programs were continuously implementing the necessary adaptive strategies since their early stages of operation and continued to do so up until this study.

One other factor may account for the survival of these 10 programs. Lifespan in itself can be advantageous for homesharing programs. Organizations that have been, on average, in operation longer are likely to have more experience than those who are younger. Since seven of the 10 surviving programs are at least 12 years old, these programs may have had more experience and stability when funding to homesharing programs was cut in 1993 and in 1995 when compared to those programs who were younger in their years of operation.

### **6.1.2. Target Population and Client Restrictions**

When compared with the Canadian literature on homesharing, (Boyd-Noel, 1994; Gutman and Doyle, 1989) findings from this study show that the six surviving programs have shifted their target population from primarily seniors and expanded it to include single parent families, persons with disabilities and newcomers to Canada. In 1989, 100% of the established programs targeted seniors and in 1994 and 2000, almost 67% of the established programs targeted seniors. This likely demonstrates that while targeting seniors remains important for recruiting clients to homeshare, many of the surviving programs have broadened their target population to include a more diverse population to be served and housed.

With respect to client restrictions, compared to the 1989 and 1994 studies, findings from the present study show that surviving programs have fewer restrictions regarding age, geographic location, household type, mental health and drug/alcohol abuse. Regarding age, in 1989 and 1994, almost 50% of the 1989 and less than 14% of the 1994 programs required that one person be 55 years or over in a homesharing match. In 2000, none of the six surviving programs had age restrictions. It also appears that surviving programs are putting more weight on serving those clients with the ability to take care of themselves. In 1989 and 1994, about 38% and 64% of programs required that individuals were able to take care of themselves. In 2000, 83.3% of the surviving programs restricted their services to independent and able clients.

Based on the organizational adaptation literature, it appears that surviving programs are also making adaptations in the form of their client restrictions. This likely reflects an expansion services whereby homesharing became one of many housing programs targeting low-income seniors and therefore, also accounts for the changes in clientele (shifting from seniors to a diversified population) (Netting and Williams, 1997; McMurtry et al., 1991).

This was further supported in the in-depth follow-up. All of the interdependent homesharing programs reported other services besides matchmaking, referral and counseling. These other services included settlement services for immigrants or refugees, language training and/or ESL programs, advocacy, homelessness and eviction prevention programs, and rent banks. The diversity of these services is a reflection of those adaptations made with respect to target population and client restrictions by homesharing programs and demonstrates an important transition in their evolution from 1989 to 2000.

### **6.1.3. Form<sup>15</sup>**

The most interesting finding regarding form is that five of the six surviving programs are interdependent. However, in the 1989 study, 4 of these programs were independent. Additionally, all five of the surviving interdependent programs merged with another organization as result of provincial cuts in funding as a means to survive. The literature on nonprofit survival shows that merging has been primarily used in the for-profit sector "to deal with environmental uncertainty" (Golensky and DeRuiter, 1999: 2) and is slowly being incorporated into the nonprofit sector. Traditionally, merging is used as a last resort rather than as a planned tool. Advantages of merging include increasing the range of funding opportunities, improving organizational efficiencies by economies of scale, maximizing clientele through expansion of targeting a diverse population and decreasing competition for limited resources (Golensky and DeRuiter, 1999: 3). It appears that this merging strategy has strengthened the survival homesharing programs by combining several housing programs into one organization, i.e., Housing Help Centres.

### **6.1.4. Organizational Capacity**

It was difficult to determine if organizational capacity had changed in the surviving programs, as it was not fully addressed in the two previous studies. This section includes comparing select variables of organizational capacity

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<sup>15</sup> The study findings could only be compared with the 1989 study, as they were not reported in Boyd-Noel's 1994 study.

(strategic planning, governance, human resources and core resources) that were addressed from the 1989 study to the findings from the present study.

### **Strategic Planning**

Compared with the 1989 programs, the findings from this study suggest that surviving programs have increased their use of strategic planning. In 1989, less than half of all established programs had a strategic plan whereas all of the six surviving programs currently have a plan. The literature on nonprofit organizations suggests that programs are having to become more innovative regarding their funding sources as well being increasingly accountable to its clients, community and, in particular, their funders (Alexander, 1999; Jacksonville, 1998). This is achieved primarily by having a clear and regularly updated mission statement, a strategic plan and a set of measurable program outcomes. Findings from this study suggests that homesharing programs are more aware of the importance of planning for good service delivery as well as being accountable to their clients, community and funders.

### **Governance**

Findings from the present study show that the six surviving programs had a board of directors more often than those programs established in 1989 (39%). It seems that advisory committees were also used as a type of board of directors in the 1989 and the two may have had similar roles and responsibilities regarding governing for homesharing programs. Having a board of directors rather than an advisory committee has likely evolved from programs seeking nonprofit status, which states, among others, that nonprofits need to be self-governing internally with a voluntary board of directors. Nonprofit status is also key in

accessing public funding and for certain types of private funding and it is possible that in more recent years, advisory committees were not considered equal to a board of directors. Subsequently, homesharing programs may have shifted in order to meet the requirements of nonprofit status.

### **Technology**

The use of technology (in the form of a computer) seems to have changed considerably when the present findings from this study were compared to the 1989 study. It appears that the main difference is that all six surviving programs use computers in every day operations and in the 1989 study, programs were in the preliminary stages of acquiring computers (21% used technology in their every day operations). This finding seems to parallel the worldwide shift in the use technology in the workplace from the late 1980s to the year 2000, rather than specifically for homesharing programs.

### **Performance Outcomes**

The number of inquiries<sup>16</sup> per month, the number of matches made, and the duration of these matches was used to determine performance outcomes. It was difficult to compare the findings from this present study to the 1994 study due to the small number of surviving programs tracking their outcomes (three out of six) from this study. However, it is estimated that the number of homesharing inquiries has decreased by at least half when compared to the 1994 study.

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<sup>16</sup> Number of inquiries are compared only for the 1994 and 2000 programs as the 1989 study did not include this variable in their study.

With respect to matches made, it appears that there was a considerable range of matches being made by the different programs. Typically, programs in their early years of establishment appeared to have made fewer matches than those programs that were in operation longer. For example in the 1989, all of the programs established between 1980 and 1985, were making between 20 and 300 matches per year, whereas almost all of the programs established between 1986 and 1988 made zero to 19 matches per year. The present study findings show a similar trend; the one program established in 1998 had only made three matches to date, whereas those programs established in the 1980s were making between 70 and 126 matches per year. This may reflect that programs with longer lifespan may have more advantages than newer programs. For example, programs with a longer lifespan may have reputable name among its clients and other professionals in the community than those programs just starting. The concept of homesharing might be well defined in a community where an older homesharing program is located. Consequently, they may receive more referrals and inquiries, and subsequently are able to make more matches from this larger pool of clientele.

Duration of matches seems to be similar for findings from the 1994 study and this research. For both the 1994 and current study, the length of matches ranged from three months to over a year with an average duration of approximately eight to nine months. This likely demonstrates that homesharing is still being used by younger home seekers as an intermittent alternative for housing. The literature on homesharing shows that typically older persons are looking for longer more permanent matches and are often the home providers, whereas the younger sharers are looking for a temporary housing solution until they are able to find a more permanent solution and they are typically the home seekers (Danigelis and Fengler, 1991; Gutman and Doyle, 1989; Jaffe and Howe,

1988). Since the surviving homesharing programs are targeting a more diversified clientele, it appears that homesharing still remains a temporary housing solution for most of its users.

#### **6.1.5. Perceived Impact of Homesharing**

It appears that the perceived impact of homesharing programs has gradually shifted from having a small impact (1989) to the avoidance of premature institutionalization and increasing availability of housing (1994) to providing affordable housing options for low-income individuals (2000). These trends suggest that the concept of homesharing has expanded to include a wide variety of populations with a diversity of housing needs. For example, in the late 1980s, homesharing was still very new to Canada and the awareness levels of clients, community and professionals may not have been optimal. In 1994, it appears that the homesharing concept became better known and programs were aiming to promote continued independence for seniors as well as provide alternative housing options for other populations, including single parents, newcomers to Canada, university students, etc. The present study findings suggest that homesharing is becoming a viable option for low-income individuals, including seniors, the homeless, single parent families, newcomers to Canada and persons with a disability. It also appears that providing access to affordable housing appears continues to be a major concern for housing programs, especially in Ontario.

In the in-depth follow-up, many of the programs indicated that homesharing is often the only option for persons with a low income, which includes many populations, one of which continues to be seniors.



## 6.2. *Key Differences between Surviving and Closed Homesharing Programs*

This section provides a summary of the key differences between surviving and closed homesharing programs. Differences in general characteristics are described followed by organizational motivation and capacity, services offered, accountability, adaptive strategies and perceived impact of homesharing.

### **6.2.1. General Characteristics**

#### **Lifespan**

Surviving programs were significantly more likely than closed programs to have a longer lifespan (Mann-Whitney  $U = 55.5$ ,  $p < .01$ ). Findings from this study parallel those from the literature on organizational survival (Bielefeld, 1994; Galaskiewick, 2000). It is highly unlikely that lifespan causes a program to survive. Rather, it is more likely that surviving programs have longer lifespans due to their ability to adapt their internal environment.

#### **Target population and client restrictions**

The present study found that surviving programs were significantly less likely than closed programs to target well older persons for their programs (Pearson  $r = -.567$ ,  $p < .01$ ) and more likely than closed programs to target single parents (Pearson  $r = .378$ ,  $p < .05$ ), newcomers to Canada (Pearson  $r = .529$ ,  $p < .01$ ) and persons with a disability (Pearson  $r = .497$ ,  $p < .05$ ). In the 1994 study, Boyd-Noel commented on the changes programs had made to their target population. Her study found that homesharing programs were broadening their target populations to allow for a larger clientele pool to increase the likelihood of

making successful matches. It appears that the six surviving programs are using a similar adaptive strategy, diversification of target population, as a means to increase their clientele pool as well as to meet the rising need for housing for low-income individuals and the homeless.

Surviving programs were also significantly less likely than closed programs to have an age restriction (Pearson  $r = -.548$ ,  $p < .01$ ). This is similar to the findings on target population. It appears that surviving programs are serving a range of clients with heterogeneous characteristics with less emphasis on seniors. In the in-depth follow-up, the programs in Ontario indicated that many of their clientele were low income or homeless with fewer older adult clients (approximately 2-3%). Having fewer client restrictions allows for an increase in eligible home sharers and increases the likelihood of making more matches.

### **Form**

Surviving homesharing programs were not quite significantly more likely than closed programs to be interdependent (Chi-Square=4.784,  $p < .09$ ). In the in-depth follow-up, five of the six surviving programs indicated that when their funding was cut in 1993, they were forced to merge with another organization as a survival strategy. Generally, the surviving homesharing programs are being offered within a department that offers other community housing programs. As previously mentioned, the literature suggests that merging with another organization is used to deal with environmental uncertainty and to offset competition for resources, i.e., funding (Golensky and DeRuiter, 1999).

### **6.2.2. Organizational Motivation and Capacity**

The second hypothesis stated that surviving programs would have a higher organizational motivation and capacity when compared to closed programs. The findings from the present study did not support this hypothesis. It appears that surviving and closed programs were both very aware of the importance of the internal environment and its impact on an organization's ability to produce outputs. As seen in the OS approach, one component of effectiveness is a successful cycle of inputs-transformation-outputs. It appears that both surviving and closed programs demonstrated an effective and well-managed internal environment and that this component may not influence survival. It does however show that programs can be successful in certain areas, such as organizational motivation and capacity, but that this does not necessarily guarantee that they will survive

### **6.2.3. Accountability**

The third hypothesis stated that surviving programs would have higher accountability (e.g., a higher number of accountability practices) compared with closed programs. The findings from this study do not support the hypothesis. In fact, there was a trend in the opposite direction: surviving programs were less accountable than closed programs. It is plausible that the form of a program, either independent or interdependent, may have influenced this finding. Since more closed programs were independent than surviving programs, it could be that the closed programs were required to be more diligent in their accountability practices. It is plausible that surviving programs were accountable as a department and therefore, were not required to track the specific outcomes of their homesharing program. As previously mentioned, merging is often advantageous as it reduces competition for funding.

Speculation could be made that it is more plausible to access funding for an organization that manages several housing programs, including homesharing, rather than obtaining funding support for one homesharing program. This may, therefore, account for the differences in accountability practices between the closed and surviving programs.

#### **6.2.4. Adaptive Strategies**

The fourth hypothesis stated that surviving programs would use more adaptive strategies than closed programs. This hypothesis was statistically supported in the present study findings with respect to the total number of services used ( $t= 5.139$ ,  $df=10$ ,  $p<.001$ ) and in the literature on organizational adaptation (Alexander, 1999l; Golensky and DeReuiter, 1999; Bielefeld, 1994; McMurtry, Netting and Ketner, 1991). However, there was no statistically significant difference between the surviving and closed programs in the types of adaptive strategies used. This could possibly be explained by the terminology used in the questionnaire. In the service cutbacks strategy section, there was no mention of a decrease in matchmaking, counseling, and/or referral services as type of service reduction. Instead, a more vague term was used: eliminated or shrunk service. It is possible that programs did not associate changes in matchmaking services with eliminated or shrunk services and therefore did not report this as an adaptive strategy.

#### **6.2.5. Services Offered**

The first hypothesis was that surviving programs would be more offer more matchmaking, referral and counselling services than closed programs. The rationale for this hypothesis was derived from findings in the 1989 homesharing

study, whereby surviving programs had offered more matchmaking services and engaged in more services offered (referral and counselling services). The present study found support for one variable, referral ( $t=6.411$ ,  $df=24$ ,  $p<.001$ ).

Unexpectedly, an inverse relationship was found for matchmaking ( $t=6.632$ ,  $df=24$ ,  $p<.001$ ) and counseling ( $t=2.835$ ,  $df=24$ ,  $p<.01$ ). Surviving programs offered fewer matchmaking and counseling services than closed programs.

A likely explanation for the finding emerged in-depth follow-up. The telephone interviews with the six surviving showed that programs were experiencing higher workloads, an increasing number of clients with complex cases and high internal stress. Since matchmaking is considered very labour intensive by many of the surviving programs, it appears that they tend to offer those matchmaking services that require the least amount of time. Also, at the time of the 1989 study, it appears that funding was more generous than in the present study and with no significant changes in staffing since 1989, it is plausible that the homesharing programs studied in 1989 had more time to offer more matchmaking services than the surviving programs from this study.

Surviving programs were also less likely than closed programs to conduct in-depth home interviews (Pearson  $r=-.780$ ,  $p<.001$ ), do medical (Pearson  $r=-.410$ ,  $p<.05$ ) and personal (Pearson  $r=-.434$ ,  $p<.05$ ) reference checks, view home providers ( $-.463$ ,  $p<.010$ ) and home seekers' (Pearson  $r=-.378$ ,  $p<.01$ ) homes, attend the introduction between potential clients (Pearson  $r=-.555$ ,  $p<.01$ ) and assist in the drawing up of homesharing agreements (Pearson  $r=-.663$ ,  $p<.001$ ). Surviving programs were also significantly less likely than closed programs to offer community education and services (Pearson  $r=-.583$ ,  $p<.01$ ) and interpersonal skills for homesharing (Pearson  $r=-.647$ ,  $p<.001$ ). Since referrals are easily made and less time consuming, it appears that surviving programs are

referring their clients rather than providing additional matchmaking services and counseling.

The findings from the survival analysis showed that lifespan was a predictor of the number of matches offered by programs. Those programs offering a lower number of matchmaking services were significantly more likely than those offering a higher number of matchmaking services to have a longer lifespan (Log Rank Test=8.68, df=1,  $p<.01$ ). It could be concluded that surviving programs had longer lifespans because they were successful making adaptations (e.g., service reduction) to the number of matchmaking services (progressively decreasing) in order to respond favorable changes in the external environment (e.g., funding cutbacks).

### **6.2.6. Perceived Impact of Homesharing Programs**

The majority of surviving programs reported that their most important impact was both increasing housing options and assisting low-income people in need of housing. At the time of the 1989 study, most of the closed programs had felt similar to the established programs in noting that the impact of homesharing is small, but the potential is there. It is plausible that perceived impact was influenced by such factors as lifespan. Since lifespan was significantly higher for surviving programs than closed programs, perhaps the closed programs never reached a point where they felt as though they were impacting their clients in the same capacity that the surviving programs were.

### ***6.3. The Impact of the External Environment: Obstacles faced by Homesharing Programs***

The majority of surviving programs reported that the main obstacle faced by their homesharing program was either a lack of public awareness and/or funding barriers. Closed programs thought that funding barriers were the main obstacle with the legalities around homesharing and unrealistic expectation of the clients being secondary obstacles. In conjunction with these findings, when the closed programs were asked to state the reasons for program dissolution, all of the programs indicated a lack of funding (one program indicated a change in government, which implied changes in the priorities of funding distribution). Furthermore, of all the adaptive strategies applied, closed programs were most likely to have explored new grant funding opportunities (83.3%) whereas surviving programs tended to expand their networking with other agencies (83.3%). The types of adaptive strategies employed by the surviving and closed programs appear to parallel their perceived obstacles faced by their programs.

This would suggest that programs are making adaptations to their internal environments to counterbalance threats in the external environment.

#### **6.4. *Study Findings as They Relate to the Open Systems (OS) Model***

The open systems model provided a comprehensive approach to diagnosing effectiveness or, survival in the case of Canadian homesharing programs. The open systems model demonstrated that homesharing programs were able to acquire their inputs from the environment, transform them into outputs and use their outcomes to provide feedback to create a balance between the internal and external environments (see Figure 2). The literature also suggests that surviving homesharing programs are capable of using the open systems model to create self-maintenance based on acquiring resources from the environment (Scott, 1998). In fact, the literature stipulates that homesharing programs need interaction and resources from the external environment in order to survive (Buckely, 1967, in Scott, 1998). Since homesharing programs are continually going to be faced with challenges that present themselves in the external environment, it appears that the process in which programs create a balance between their internal and external environments is the key to survival.

According to the OS literature, the open model includes two important concepts of effectiveness: a well-managed and effective internal environment and making adaptations in response to changes in the external environment. There are two sets of system processes to enable organizational effectiveness: morphostasis and morphogenesis (Scott, 1998). The former refers to processes that tend to preserve or maintain a program's state and the latter describes processes that change a program (Scott, 1998). In the case of homesharing programs, it appears that surviving and closed programs were not different



regarding organizational motivation and capacity, which could suggest similar morphostasis processes. Regarding the internal environment, organizational motivation and capacity are important for stability and maintenance regarding how well a program can produce its outputs. On the other hand, it appeared that surviving programs were different regarding services offered and adaptive strategies. This may reflect differences in the surviving and closed program's morphogenesis processes. Surviving programs were significantly more likely to have implemented more adaptive strategies and to have changed the services they offered in order to adapt to the external environment. This supports one of the underlying principles of the open systems model; homesharing have to adapt in order to survive. Surviving programs are not the same as they were in 1989 or 1994 nor are they the same as closed programs. This research has shown that homesharing programs have had to constantly change in order to survive. According to Scott (1998: 100) "To survive is to adapt, and to adapt is to change".

#### **6.5. *Key Factors in the Survival of Homesharing Programs Serving Seniors in Canada***

It appears that the implementation of adaptive strategies is the key factor in the survival of homesharing programs in Canada. While the overall number of adaptive strategies applied was significantly different between surviving and closed programs, the type of adaptive strategies employed appears to be just as important. However, choosing what type of adaptive strategy to use appears to depend on the external environment presented to each individual program. Generally, it appears that surviving programs were significantly more likely than closed programs to alter the services they offered (matchmaking, referral and

counseling). Survival meant decreasing the number of matchmaking and counseling services and increasing the number of referrals.

Other key factors that emerged from the findings of this study, include form, target population and client restrictions, and lifespan. Being of the interdependent form is more advantageous regarding survival. This relates back to the literature on merging: bringing two organizations together to form one reduces the impact of environmental uncertainty and offsets competition for resources as well as taking advantage of organizational efficiencies and maximizing access to clients (Golensky and DeRuiter, 1999). Having a diverse target population and few client restrictions also increases the likelihood of survival. Surviving programs exemplified this by marketing their services to several different populations and by having fewer client restrictions. Using such tactics maximizes the overall number of overall and increases the pool for making potential matches.

Although lifespan was significantly longer for surviving programs, it is highly unlikely that it causes survival. Speculation, however, can be made that a longer lifespan leads to increased experience in dealing with changes in the external and internal environments as well as increased awareness by clients, in the community and by funders. Having a longer lifespan also allows for increased exposure and awareness by other community programs and professionals and promotes the use of partnerships by way of referrals and support.

## **6.6. *Study Limitations***

This study was subject to a series of limitations, which are discussed in the following section.

### **6.6.1. Sample and Group Size**

Even though the homesharing concept and homesharing programs have been in existence in Canada since 1980, the overall number of established programs (35) was small. Furthermore, the number of programs still in operation (10) was very small. Only a few variables were measured using all 35 programs while other variables were limited to 27 and 12 cases, respectively. The small sample in this study may have been prone to variability and may have failed to demonstrate significant differences between the surviving and closed programs. Also, the surviving and closed groups were unequal in their group size. An unequal group size may have affected the results. Since the standard deviation tends to decrease with increased sample size, the small and unequal group size may have introduced error into some of the findings. Despite the small sample sizes, it is important to note that the two groups were well represented: at least 60% of all surviving programs represented the survivor group for all of the variables and 24% to 100% of programs represented the closed group.

### **6.6.2. Unavailability of Data**

Only the original data from the 1989 study could be located at the time of the study. The data available in this study was used for those programs in existence in 1989 but closing after 1994. It was very difficult to determine if surviving programs changed some of their practices since 1989, such as objectives, target populations, client restrictions, services offered, etc. Not having the original data from the 1994 study may have affected the results. For instance, some of the differences found between surviving and closed programs

may not have been as significant if the original data from the 1994 study were available and used in this study. Despite not having this data, statistical significant differences were found for matchmaking and accountability when only the 6 surviving and 6 closed programs were compared.

Finally, there were some areas of the internal environment that should have been inquired about with the closed programs. For instance, program outcomes should have been addressed in the closed homesharing program questionnaire. At the time of the study, the researcher felt that many of the closed programs would not have had access to this data. Some insight, whether speculative or not, on behalf of the closed programs would have allowed for some comparison between the surviving and closed groups.

### **6.6.3. Study Parameters**

Examining the internal efficiency of an organization is an important part of organizational effectiveness, however, it limits itself to a narrow view of effectiveness. In order to provide a holistic view of organizational effectiveness, the scope of diagnosis should include the efficiency of the internal environment, the human relation side of an organization and its cost-effectiveness. This study examined the internal environment, with the organization as the primary focus. Measuring cost-effectiveness is important as it provides information on the ratio between the costs of producing outputs in relation to the overall number of matches being made. It typically measures whether or not a program is financially feasible to offer, that is, if a nonprofit program is breaking even rather than losing money. Human relations focus more on the person side of an organization, an important aspect of organization effectiveness, as the people make up the organization and provide skills to produce the outputs. An

examination of organizational culture, internal stress, conflicts, and communication between employers and employees allows the organization to determine how happy and productive the employees are (Hodge et al., 1996). Despite its limited focus, this study provided an in-depth examination of how well homesharing programs were using, managing and adapting their resources to create an efficient internal environment, one that matched the external environment and increased their likelihood of survival.

#### **6.6.4. Generalizability**

Findings from this study are primarily applicable to homesharing programs in Canada. Some of the results may be generalized to regions in other countries offering homesharing programs, however, some may not be applicable due to differences in such factors as funding, political environment, clientele, etc.

#### ***6.7. Implications for Further Research***

This study gives insight into the factors most likely associated with the survival of homesharing programs serving seniors in Canada. Findings from this study can be practically applied by existing programs and for those just starting up. From this study, many questions intimately related to other aspect of homesharing programs and other nonprofit programs were raised. As previously mentioned, this study focused exclusively on homesharing programs. There was no research done on the clients using the services provided by these programs. Future research could include data on and/or from the individual home sharer. This would provide support for the “softer”, more qualitative outcomes of programs, such as improving quality of life, health status, etc., as well determining reasons for choosing homesharing and whether or not these have changed from findings presented in the earlier literature.

This study made the assumption that the external environment was unstable and unpredictable for the surviving programs, but it did not explore if differences existed in the external environment for each program. It is plausible that factors in the external environment were too overwhelming for some programs and precipitated a decline in their operation. Further research is warranted to determine these differences for each province as well as exploring how surviving and closed nonprofit programs perceived the role and impact the

external environment had on the sustainability of their organization. It also appears that homesharing programs used a variety of different adaptive strategies. It could be speculated that certain changes in the external environment require employing specific adaptive strategies for survival.

Comparing surviving and closed homesharing programs to other types of nonprofit organizations serving seniors, such as seniors centres, housing societies (subsidized and market), citizen support services, etc., would provide further insight into similarities and differences between the range of organizations serving seniors. Taking this to another level and comparing surviving and closed Canadian homesharing programs to those programs in other countries would expand the range of generalizability on key characteristics impacting survival.

## Chapter 7

### Conclusion

The primary goals of this study were to identify those variables in the internal environment most likely associated with a homesharing program's survival and to examine how homesharing programs have evolved since the two previous studies done in 1989 and 1994. Based on a review of the literature, the Open Systems (OS) model was used as a guide to measure organizational effectiveness of homesharing programs. The assumption was made that the external environment of homesharing programs was constant for each individual program. The primary focus of this research was to identify and describe those variables in the internal environment most likely associated with a homesharing organization's survival.

Four hypothesis were subsequently developed and tested. The dependent variable was program status (surviving or closed) and the primary independent variables were services offered (matchmaking, referral and counseling services), organizational motivation and capacity, accountability and adaptive strategies.

Data were collected from six surviving and six closed programs by a written questionnaire addressing their (past) program's operating and organizational characteristics. This study also included an in-depth telephone questionnaire with the six surviving programs. For some variables, all 35 established homesharing programs were included and for other select variables, the six surviving and data on 21 closed programs (15 from the 1989 study) were available for analysis.

The findings were presented in two sections. The first section gave insight in how homesharing programs have changed since the original study in 1989.



However, when the study first began, the researcher was not aware of the large number of closed programs since 1994. Since only 10 programs remained, it was of little value to compare the surviving programs with the 1989 and 1994 findings. However, there were some results relevant to the evolutionary changes of surviving programs from 1989 to 2000.

The majority of programs are still found in Ontario and Quebec and no provinces east the latter offer homesharing programs. Seven of the 10 surviving programs were established between 1980 and 1988, suggesting that they have been able to continuously manage their internal environment to meet the changes in the external environment for at least 12 years. Surviving programs have been adapting their internal environment by changing their form and target populations, imposing fewer client restrictions, and adding new technology. The perceived impact of homesharing appears to have shifted from a small impact (1989) to the avoidance of premature institutionalization/increasing housing (1994) to providing affordable housing options for low-income individuals (2000).

Unpaired t-tests, bivariate analyses and survival analyses were employed to test the four hypotheses and determine the key differences between surviving and closed programs. The results showed partial support for the first hypothesis and supported the fourth hypothesis. Surviving programs were significantly more likely than closed programs refer more clients. Surviving programs were also significantly more likely than closed programs to use more adaptive strategies. Of interest was the unexpected finding regarding part of hypothesis one. Surviving programs were significantly less likely than closed programs to offer more matchmaking and counseling services. There was also an unpredicted finding for the third hypothesis. Surviving programs were less likely than closed programs to have more accountability practices. Other

significant differences between surviving and closed programs were target population and client restrictions, niche management and perceived impact of homesharing programs. There was no difference in the organizational motivation and capacity of surviving and closed programs.

Limitations of the project and areas of future research were discussed. This study provided more insight into nonprofit organizational effectiveness and specifically, explored some of the key survival factors of homesharing programs serving seniors in Canada.

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## *APPENDIX A -- Information Letter and Questionnaire to Identify Surviving Homesharing Programs in Canada*

28 August, 2000

To All Canadian Homesharing Programs/Housing Registries:

Re: Current Homesharing Agency Update

I am a graduate student in the Gerontology Masters program at Simon Fraser University. As part of my degree requirements, I am re-examining homesharing programs in Canada serving seniors. The goal of this study is to update existing 1989 and 1994 data on homesharing in Canada with current trends. Also, new information regarding organizational change and nonprofit agency survival in Canada will be a component of my thesis.

For the purpose of my study, homesharing will be defined as: "a living arrangement in which unrelated people occupy a single dwelling, share common areas, such as the kitchen, bathrooms and living rooms, [and] have some private space, including bedrooms". As many of you know, homesharing is not new: formal homesharing organizations have been in effect in Canada for 20 years, in the United States for over 25 years and in the UK for approximately six years. Currently, there are approximately 15 homesharing programs in Canada. The United States' homesharing programs have reached over 350, and England hosts six (6) programs. Furthermore, homesharing exists in Germany, Spain, and at present, Australia recently received government funding to initiate two pilot homesharing programs.

Homesharing can occur by three different methods, two of which formal organizations assist and serve consumers. Firstly, homesharing matches can be self-initiated or naturally occurring, whereby home sharers negotiate their agreement privately with little or no agency involvement. A prime example of this type of agency would be a housing registry, whereby the registry provides a name and the sharers must rely on their own capacities and resources to create a match. Secondly, there are agency-assisted homesharing programs, in which formal programs provide specific matchmaking services such as screening, matching, and follow-up services. Lastly, programs can offer sponsored-shared housing, whereby the agency owns or manages a group home. Generally, Canadian organizations are predominantly agency-assisted models and may offer peer-to-peer matches, intergenerational matches, and barter agreements. Other agency services include interviewing potential homesharers, assisting with matching process, as well as housing options counselling and community services information and education.

For my proposal, I am required to update the current listing of operating programs, whether it be a homeshare organization, or a housing help centre offering matching services. This letter is to invite your organization to complete the following one page information sheet regarding your program and its services. The information you provide me will allow for development of a subsequent questionnaire for my thesis regarding agency characteristics and organizational change for surviving Canadian homesharing programs. I will be providing those eligible and interested homesharing programs with further information regarding my thesis in the near future.

Additionally, I am also the contact person for *Homeshare International*, based in Europe, whose organization is designing a web site addressing the many international facets of homesharing. These include international developments, information on planning, developing, and implementing homeshare programs, marketing and funding strategies, etc. The web site is still

in the process of development and upon its completion, I will be sending all interested organizations the URL and other pertinent information.

If you have any questions or concerns, please feel free to contact me at 604-570-0977 or by e-mail at [wjohnsto@sfu.ca](mailto:wjohnsto@sfu.ca).

Please return you completed questionnaire to:

Wendy Johnstone  
4467 Triumph Street,  
Burnaby, BC V5C 1Z8

OR by fax at:

(604) 689-1051

Your participation will ensure an accurate and current database, not only for my thesis, but also for *Homeshare International*. Thank you for your time and information.

Sincerely,

Wendy Johnstone  
Masters Candidate, Gerontology Program  
Simon Fraser University

Attach.

**CANADIAN HOMESHARING PROGRAMS 2000**

**CONTACT INFORMATION**

Name of Homesharing Program: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Telephone Number: \_\_\_\_\_

E-mail: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Position: \_\_\_\_\_

- 1) Does your organization offer homesharing services?  
 Referral only, i.e., housing registry only  
 Referral and counselling, i.e., matchmaking homesharers, interviewing clients, follow-up, etc?
  
- 2) Does your program serve seniors, as a portion of your clientele?  
 Yes  
 No
  
- 3) Are you a nonprofit organization?  
 Yes  
 No
  
- 4) Please list any other known homesharing programs in your province or in Canada?  
  
\_\_\_\_\_

**☺ THANK YOU FOR YOUR TIME! ☺**

Aug 2000

***APPENDIX B -- Information Package and Consent (Surviving and Closed Programs)***

**Canadian Homesharing Study  
Letter of Information  
Active Programs**

February 2001

Dear Homesharing Program Coordinator:

I am a graduate student in the Gerontology Masters program at Simon Fraser University. As part of my degree requirements, I am re-examining homesharing programs in Canada. The goal of this study is to update and expand existing data on homesharing programs in Canada with new information on organizational characteristics and determinants of agency survival. By producing information on Canadian homesharing programs serving seniors, your agency will help complete a 10-year study. Therefore, your participation in this study is very important.

Your role will involve the completion of a short written questionnaire and a telephone interview. Examples of questions I will ask about the general background on your agency, its objectives, matchmaking activities, staffing, organizational structure, funding, etc. The written questionnaire will take approximately 30 minutes and the telephone interview will require an additional 30 minutes. I am very flexible and would be more than happy to conduct the telephone interview before or after work hours if your prefer.

The information you provide will be held strictly confidential and your name will not appear on any reports. You will be identified only by the province your agency is located in. You do not have to respond to any questions you are not comfortable answering. The more programs that participate in the study: the more favorable the results. There are no risks involved for those who participate in the study or their clients.

If you have concerns or questions about the study or need further information, please contact me at (604)-785-7023 Monday through Friday between 9 a.m. to 5 p.m. or at (604) 570-0977 in the evenings. Alternatively, you can contact my supervisor, Dr. Gloria Gutman at (604) 291-5062 Monday to Friday between 9 a.m. to 4 p.m. If you have any complaints regarding the study, you may contact myself and/or Dr. Gutman.

I will be contacting you by telephone, approximately two weeks after you receive this letter, to confirm your participation in the study. I will also be available at this time, to answer any questions or concerns you may have. The entire study will take approximately 4 months to complete. A summary of the results will be made available. Please find attached a consent form and a self-addressed and stamped return envelope for your convenience.

Sincerely,

Wendy Johnstone  
Masters of Gerontology Candidate  
Simon Fraser University

**Canadian Homesharing Study  
Letter of Consent -- Surviving Programs**

The Simon Fraser University and those conducting this project agree to the ethical conduct of research and to the protection at all times of the interest, comforts, and safety of all participants. This form and the letter of information are given to you for your protection and full understanding of the project procedures. Your signature on this form will mean that you have received a Letter of Information, which describes the procedures, possible risk, and benefits of this project, that you have received enough time to consider the information and that you voluntarily agree to participate in the project.

Any information that is obtained during this study will be kept confidential fully permitted by law. Knowledge of your identity is not required. You will not be required to write your name or any other identifying information on the project materials. Materials will be held in a secure location and will only be used for project evaluation.

Having been asked by Wendy Johnstone, a graduate student in Gerontology at the Simon Fraser University, to participate in a research project, I have read the procedures specified in the document.

I understand the procedures to be used and the personal risks to me in taking part in this study. I understand that I can withdraw my participation in this experiment at any time.

I also understand that I may register any complaint I might have about the project with Wendy Johnstone, or Dr. Gloria Gutman, project supervisor at (604) 291-5062.

I may obtain a summary of the results of this study, upon its completion, by contacting Wendy Johnstone at (604) 785-7023.

I have been informed that Wendy Johnstone will hold the project material confidential.

As coordinator of the homesharing program/agency, I have the authority to represent the agency for the purpose of this study.

I agree to participate by 1) completing a written questionnaire, and 2) partaking in a telephone interview between Wendy Johnstone and myself.

Time Frame: February 2001 to April 2001

Program Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Signature: \_\_\_\_\_

Witness: \_\_\_\_\_

Date: \_\_\_\_\_

**Canadian Homesharing Study  
Letter of Information  
Closed Programs**

February 2001

To Whom It May Concern:

I am a graduate student in the Gerontology Masters program at Simon Fraser University. As part of my degree requirements, I am re-examining homesharing programs in Canada. The goal of this study is to update and expand existing data on homesharing programs in Canada with new information on organizational characteristics and determinants of agency survival. By producing information on Canadian homesharing programs serving seniors, both closed and active, your information will help complete a 10-year study. Therefore, your participation in this study is very important.

Your role will be to complete a short written questionnaire. Examples of questions I will ask about the general background on the closed agency, its objectives, matchmaking activities, staffing, funding, etc. The written questionnaire will take approximately 30-40 minutes to complete.

The information you provide will be held strictly confidential and your name will not appear on any reports. You will be identified only by the province your agency was located in. You do not have to respond to any questions you are not comfortable answering. The more closed programs that participate in the study: the more favorable the results. There are no risks involved for those who participate in the study or their clients.

If you have concerns or questions about the study or need further information, please contact me at (604)-785-7023 Monday through Friday between 9 a.m. to 5 p.m. or at (604) 570-0977 in the evenings. Alternatively, you can contact my supervisor, Dr. Gloria Gutman at (604) 291-5062 Monday to Friday between 9 a.m. to 4 p.m. If you have any complaints regarding the study, you may contact myself and/or Dr. Gutman.

I will be contacting you by telephone, approximately two weeks after you receive this letter, to confirm your participation in the study. I will also be available at this time, to answer any questions or concerns you may have. The entire study will take approximately 4 months to complete. A summary of the results will be made available. Please find attached a consent form and a self-addressed and stamped return envelope for your convenience.

Sincerely,

Wendy Johnstone  
Masters of Gerontology Candidate  
Simon Fraser University

**Canadian Homesharing Study  
Letter of Consent -- Closed Programs**

The Simon Fraser University and those conducting this project agree to the ethical conduct of research and to the protection at all times of the interest, comforts, and safety of all participants. This form and the letter of information are given to you for your protection and full understanding of the project procedures. Your signature on this form will mean that you have received a Letter of Information, which describes the procedures, possible risk, and benefits of this project, that you have received enough time to consider the information and that you voluntarily agree to participate in the project.

Any information that is obtained during this study will be kept confidential fully permitted by law. Knowledge of your identity is not required. You will not be required to write your name or any other identifying information on the project materials. Materials will be held in a secure location and will only be used for project evaluation.

Having been asked by Wendy Johnstone, a graduate student in Gerontology at the Simon Fraser University, to participate in a research project, I have read the procedures specified in the document.

I understand the procedures to be used and the personal risks to me in taking part in this study. I understand that I can withdrawal my participation in this experiment at any time. I also understand that I may register any complaint I might have about the project with Wendy Johnstone, or Dr. Gloria Gutman, project supervisor at (604) 291-5062.

I may obtain a summary of the results of this study, upon its completion, by contacting Wendy Johnstone at (604) 785-7023.

I have been informed that Wendy Johnstone will hold the project material confidential. Having given my name as a contact person for the closed homesharing program/agency, I have authority to represent the closed homesharing program/agency for the purpose of this study.

I agree to participate by completing a written questionnaire as per the study parameters.

Time Frame: February 2001 to April 2001

Program Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Signature: \_\_\_\_\_

Witness: \_\_\_\_\_

Date: \_\_\_\_\_

**APPENDIX C -- WRITTEN AND TELEPHONE QUESTIONNAIRE (SURVIVING)**

**SIMON FRASER UNIVERSITY  
GERONTOLOGY RESEARCH CENTRE  
SURVIVING HOMESHARING PROGRAM QUESTIONNAIRE**

---

**NAME OF HOMESHARING PROGRAM:** \_\_\_\_\_

**ORGANIZATIONAL MOTIVATION**

This first section is going to ask questions regarding your program's history, mission and objectives.

**History of Organization**

When did the homesharing program begin operation?

\_\_\_\_\_ Month \_\_\_\_\_ year

1. Have there been other homesharing program(s) in your city prior to your program's existence?

Yes  No  Don't know (If NO or DON'T KNOW, Go to Q. 5)

2. If yes, please name the program(s) and date(s) of existence?

\_\_\_\_\_  
\_\_\_\_\_

3. What was the reason for these program(s)' dissolution?

\_\_\_\_\_  
\_\_\_\_\_

4. Is your homesharing program a "stand-alone" program, i.e., you only offer homesharing services.

Yes (Go to Q. 11)  No

5. What type of organization runs your homesharing program?

- Housing Help Centre for Seniors  
 Housing Help Centre for any population  
 Seniors Centre  
 Other (please specify): \_\_\_\_\_

6. What other type of services besides homesharing does the organization offer?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



**Mission Statement**

**QUESTIONS 8 TO 10 FOR ONLY THOSE HOMESHARING PROGRAMS RUN BY A MULTI-SERVICE ORGANIZATION**

7. Does the multi-service organization have a written mission?  
 Yes     No     Don't know    (If NO or DON'T KNOW, Go to Q. 14 )
8. Is the multi-service organization's mission statement updated on a regular basis?  
 Yes     No     Don't know
9. Do the staff and the board identify with the mission?  
 Yes     No     Don't know

**QUESTIONS 11 TO 13 FOR ALL "STAND ALONE" HOMESHARING PROGRAMS**

10. Does your homesharing program have a written mission?  
 Yes     No     (If NO, go to Q. 14 )
11. Is your homesharing program's mission updates on a regular basis?  
 Yes     No
12. Do the staff and the board identify with the program's mission?  
 Yes     No

**Objectives**

13. Please rank the importance of your homesharing program's objective(s)? A rank of (1) is considered the most important objective. Only rank those objectives that apply to your program.
- \_\_\_ a) To increase the supply of affordable housing
  - \_\_\_ b) To relieve problems of isolation for older people
  - \_\_\_ c) To enable older people to remain independent in the community
  - \_\_\_ d) To provide services to older persons/others in need
  - \_\_\_ e) Other \_\_\_\_\_
  - \_\_\_ f) Other \_\_\_\_\_
14. Is this objective/are these objectives the same as when the program started?  
 Yes     No

## ORGANIZATIONAL CAPACITY

The following section will examine strategic planning, leadership, governance and niche management, and human resources in your program/organization.

### Strategic Planning

#### QUESTIONS 16 TO 20 FOR ONLY THOSE HOMESHARING PROGRAMS RUN BY A MULTI-SERVICE ORGANIZATION

15. Does the multi-service organization have a strategic plan?

Yes     No     Don't know (If NO or DON'T KNOW, Go to Q. 26)

16. To what degree is the multi-service organization's board of directors involved in the development of the strategic plan?

Very Involved     Somewhat Involved     Not Involved     Don't know

17. To what degree do your board members support the strategic plan, e.g., are they committed to the organization?

Support it a lot     Support it a little bit     Do not support it     Don't know

18. To what degree does the staff of the multi-service organization support the strategic plan?

Support it a lot     Support it a little bit     Do not support it     Don't know

19. To what degree do the volunteers of the multi-service organization support the strategic plan?

Support it a lot     Support it a little bit     Do not support it     Don't know

#### QUESTIONS 21 TO 24 FOR ALL "STAND ALONE" HOMESHARING PROGRAMS

20. Does your homesharing program have a strategic plan?

Yes     No     Don't know (If NO or DON'T KNOW, Go to Q. 26)

21. To what degree is your homesharing program's board of directors involved in the development of the strategic plan?

Very Involved     Somewhat Involved     Not Involved     Don't know

22. To what degree do your board members support the strategic plan, e.g., are they committed to the organization?

Support it a lot     Support it a little bit     Do not support it     Don't know

23. To what degree does your homesharing staff support the strategic plan?

Support it a lot     Support it a little bit     Do not support it     Don't know

24. To what degree do your homesharing volunteers support the strategic plan?

Support it a lot     Support it a little bit     Do not support it     Don't know

### Leadership

25. Does a single executive head your program?

Yes    (Go to Q. 30)     No

26. If NO, who runs your homesharing program? \_\_\_\_\_

27. What is their position or role in the homesharing program?  
\_\_\_\_\_

28. Has there been a turnover of more than two executive directors/program manager in the past five years?

Yes     No

29. Has there been a major leadership crisis within the past five years?

Yes     No

30. Is your executive director/program manager a professional?

Yes     No

31. If "Yes", what is his/her profession?  
\_\_\_\_\_

#### **Governance**

32. Is your homesharing program governed by:

- A board of directors for the multi-service organization and the homesharing program is among one of their programs (Go to Q. 34)  
 A board of directors solely for the homesharing program (Go to Q. 39)

#### **QUESTIONS 34 TO 38 ONLY FOR THOSE HOMESHARING PROGRAMS RUN BY A MULTI-SERVICE ORGANIZATION**

33. To what degree is the multi-service organization concerned about recruiting effective board members?

Very concerned     Somewhat concerned     Not concerned at all     Don't know

34. Is there an orientation for new board members?

Yes     No     Don't know

35. Has the multi-service organization's board been restructured in the past five years?

Yes     No     Don't know

36. How skilled are the organization's board members in nonprofit governance?

Very skilled     Somewhat skilled     Unskilled     Don't know

37. To what degree does the multi-service organization's board of directors understand the importance of the environment and its influence on the organization?

Completely understand     Somewhat understand     Do not understand     Don't know

**QUESTIONS 39 TO 43 FOR ALL "STAND ALONE" HOMESHARING PROGRAMS**

38. To what degree is the homesharing program concerned about recruiting effective board members?

- Very concerned     Somewhat concerned     Not concerned at all     Don't know

39. Is there an orientation for new board members?

- Yes     No     Don't know

40. Has the homesharing program's board been restructured in the past five years?

- Yes     No     Don't know

41. How skilled are the homesharing program's board members in nonprofit governance?

- Very skilled     Somewhat skilled     Unskilled     Don't know

42. To what degree does the homesharing program's board of directors understand the importance of the environment and its influence on the organization?

- Completely understand     Somewhat understand     Do not understand     Don't know

**Niche Management**

43. How do you promote your services? (Check all that apply)

- |  |   |
|--|---|
| <input type="checkbox"/> Radio/Television          | <input type="checkbox"/> Telephone                      |
| <input type="checkbox"/> Flyer Distribution        | <input type="checkbox"/> Community information displays |
| <input type="checkbox"/> Local Newspaper           | <input type="checkbox"/> Press Release                  |
| <input type="checkbox"/> Posters in the Community  | <input type="checkbox"/> Word of Mouth                  |
| <input type="checkbox"/> Outdoor/Bus advertisement | <input type="checkbox"/> Newsletter                     |
| <input type="checkbox"/> Direct mailing            | <input type="checkbox"/> Other: _____                   |

**Human Resources**

44. What paid staff does your homesharing program have at this time?

Staff Job Title	Responsibilities	FT/PT
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

45. What volunteer staff does your homesharing program have at this time?

Volunteer Job Title	Responsibilities	Hrs/week
_____	_____	_____
_____	_____	_____
_____	_____	_____

46. Does your homesharing program have written job descriptions for all staff?

Yes  No

47. Have your staffing numbers changed since your program started?

Yes  No

48. Does your homesharing program have written job descriptions for all volunteers?

Yes  No

49. Have your volunteer numbers changed since your program started?

Yes  No

**CORE RESOURCES**

This next section is going to ask you questions regarding your sponsorship and funding sources.

**Sponsorship**

50. Does your homesharing program currently have a sponsoring agency?

Yes  No (If NO, Go to Q. 58)

51. Who are the current sponsors of your homesharing program?

Name(s): \_\_\_\_\_

52. What form of sponsorship is it?

a)  Regional Municipality  Housing Department  
 Planning Department  
 Seniors Department  
 Social Services Department

b)  Private, non-profit agency  Seniors Organization  
 Family/Community Service  
 Community Group  
 Church  
 Health Service  
 Housing Service

c)  Autonomous non-profit agency

d)  Commercial Operation

53. What resources do your sponsors provide for you: (Please check all that apply)

Office Space/and or free rent  Volunteers  
 Office Equipment  Financial  
 Staff -- home sharing  Other  
 Staffing management  
 Secretarial assistance  
 Bookkeeping

54. Since your program started have you had a change in: sponsoring agency, sponsorship status or both? Please circle.

55. Is your sponsoring agency supportive with respect to your homesharing program?

- Very supportive
- Fairly supportive
- Not very supportive

**Funding**

56. We would like to know what funding your agency received for this fiscal year (April 1, 2000 March 31, 2001) -- Please note: only home sharing program budget, not the entire organization's budget). Please list all funding amounts. If it easier to send separately, please attach to questionnaire.

Government Contracts: \_\_\_\_\_

Charitable Contributions: \_\_\_\_\_

Client Fees: \_\_\_\_\_

Public Grants: \_\_\_\_\_

Private Grants: \_\_\_\_\_

Other Sources: (please specify): \_\_\_\_\_

57. What is your total budget for April 1, 2000 to March 31, 2001?

\_\_\_\_\_

58. Is there a reserve fund or other cushion for lean times?

- Yes     No

**Technology**

59. Does your homesharing program use computer technology in its every day operations?

- Yes     No

60. Does your homesharing program have a web site?

- Yes     No

**PROGRAM AND PROCESS MANAGEMENT**

**Planning**

61. Did your homesharing program complete a needs assessment prior to developing your programs?

- Yes     No

**MONITORING AND EVALUATION**

62. Please indicate if you track the following information on your or program operations and inquiries. If you answer yes to any of the following questions, please indicate your findings in the space provided.

	Yes	No	Findings
The number of people who inquire about homesharing, on average, per month			
The reasons for their inquiries			Please list reasons
The number of interviews conducted, on average, per month			
The number of introductions required to make one match			
The number of people registered and the number of people actually matched			
Why people decide not to homeshare			Please list reasons

63. Is your homesharing program disciplined/rigorous about the following systems? (New)

- Personnel  Yes  No
- Budget  Yes  No
- Managing time  Yes  No
- Governance  Yes  No

64. Does your organization seek evaluation of its homesharing program?

- Yes  No

65. Does your organization actively measure the outcomes of your homesharing program?

- Yes  No

**PROGRAM SERVICES**

This following section will look at your homesharing program’s services including matchmaking activities, additional services outside of homesharing, and service exchange

**Client Selection Criterion**

66. What are the primary target population(s) for your program? (Check all that apply)

- No Target Population
- Well Older persons (age: \_\_\_\_\_)
- Frail Elderly (define: \_\_\_\_\_ )
- Single Parent Families
- Persons with disabilities
- University Students
- Newcomers to Canada
- Other: \_\_\_\_\_

67. What is the catchment area of your program? \_\_\_\_\_

**Restrictions**

68. Some programs restrict themselves to certain target populations or areas. Please indicate whether your homesharing program has a restriction and if it applies to home providers, home seekers, or both.

Restriction Category	Home provider	Home seeker	Both
Age	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Geographic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to take care of themselves	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Religious and/or cultural affiliation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Household type	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mental health	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Drug/Alcohol Abuse	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Length of time on Registry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

69. Have any of these restrictions changed since the program started?

Yes  No

**Match-Making Activities**

70. Please indicate which activities your homesharing program uses. Please place any additional comments in the right border space

	YES	NO
• Interview each client	<input type="checkbox"/>	<input type="checkbox"/>
• Conduct in-depth home interviews	<input type="checkbox"/>	<input type="checkbox"/>
• Reference checks:		
Medical	<input type="checkbox"/>	<input type="checkbox"/>
Landlord	<input type="checkbox"/>	<input type="checkbox"/>
Police	<input type="checkbox"/>	<input type="checkbox"/>
Personal	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>
• Note how many references are required: Providers: _____ Seekers: _____		
• View home provider's home	<input type="checkbox"/>	<input type="checkbox"/>
• View home seeker's home	<input type="checkbox"/>	<input type="checkbox"/>
• Signing of disclaimer	<input type="checkbox"/>	<input type="checkbox"/>
• Referral of home sharers to each other	<input type="checkbox"/>	<input type="checkbox"/>
• Arranging introductions between potential clients	<input type="checkbox"/>	<input type="checkbox"/>
• Attend introductions between potential clients	<input type="checkbox"/>	<input type="checkbox"/>
• Organize introductory teas, socials	<input type="checkbox"/>	<input type="checkbox"/>
• Provide sample home sharer's agreement	<input type="checkbox"/>	<input type="checkbox"/>
• Assist in drawing up home sharer's agreement	<input type="checkbox"/>	<input type="checkbox"/>
• Arrangement of trial periods	<input type="checkbox"/>	<input type="checkbox"/>
• Follow-up to see how match is progressing	<input type="checkbox"/>	<input type="checkbox"/>
• Method:		
phone calls	<input type="checkbox"/>	<input type="checkbox"/>
Home visits	<input type="checkbox"/>	<input type="checkbox"/>
Match evaluation questionnaire	<input type="checkbox"/>	<input type="checkbox"/>
• Mediation of disputes	<input type="checkbox"/>	<input type="checkbox"/>



71. Have your matchmaking activities changed since your program first started?

Yes  No

72. Is your matchmaking service free?

Yes  No If "NO", How much do you charge? \_\_\_\_\_

**ADDITIONAL SERVICES/INFORMATION PROVIDED TO CLIENTS**

73. Does your home sharing program provide counselling to clients?

Yes  No (Go to Q. 77)

74. If YES, what type of counselling?

- Housing options counselling
- Community services information and education
- Inter-personal skills for home sharing
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_

75. Do you think a referral and counselling model is more effective than a referral only mode for homesharing programs?

Yes  Somewhat  No  Don't know

76. Does your home sharing program routinely refer clients to other services?

Yes  No (go to Q. 79)

77. If YES, what other services do you refer your clients?

	% of clients referred
<input type="checkbox"/> Legal	_____
<input type="checkbox"/> Medical	_____
<input type="checkbox"/> Income assistance	_____
<input type="checkbox"/> Other housing services	_____
<input type="checkbox"/> Seniors Centers	_____
<input type="checkbox"/> Drug/alcohol Centre	_____
<input type="checkbox"/> Social workers	_____
<input type="checkbox"/> Home support programs	_____
<input type="checkbox"/> Education/employment	_____
<input type="checkbox"/> Family/Personal counselling	_____
<input type="checkbox"/> Credit/Financial management	_____
<input type="checkbox"/> Other: _____	_____

**PROGRAM OUTCOMES**

78. This section will examine the number of clients served, those clients matched, and the duration of these matches. Clients served include any person inquiring about homesharing.

	1999	1998	1997	Comments
What percentage of your inquiries were 55 years and over in?				<input type="checkbox"/> Did not track
What percentage of your inquiries were 55 years and under in?				<input type="checkbox"/> Did not track
How many clients did you register for homesharing?				<input type="checkbox"/> Did not track
How many matches did you make?				<input type="checkbox"/> Did not track
What percentage of your matches was intergenerational?				<input type="checkbox"/> Did not track
What percentage of your matches was service exchange only?				<input type="checkbox"/> Did not track
What percentage of your matches were service exchange plus rent?				<input type="checkbox"/> Did not track
What percentage of your matches was rent only?				<input type="checkbox"/> Did not track
What percentage of your matches involved two home sharers 55 year and over?				<input type="checkbox"/> Did not track
Overall, what was the average duration of a match (in months)?				<input type="checkbox"/> Did not track
What was average duration of an intergenerational match (in months)?				<input type="checkbox"/> Did not track
What was the average duration of a service exchange match (in months)?				<input type="checkbox"/> Did not track
What was the average duration of a match (in months) involving two home sharers 55 years and over?				<input type="checkbox"/> Did not track

79. What do you consider the most important impact of your homesharing program? Please check only one answer.

- Increases housing options/availability of housing units
- Offers companionship and sense of security to clients
- Assists low income people in need of housing
- Helps people waiting for non-profit or institutional placement
- The impact of home sharing is small, but the potential is there
- Other: \_\_\_\_\_

## SURVIVAL OF HOMESHARING ORGANIZATIONS IN CANADA

### Management and Operational Survival

80. In your opinion, what operational and management procedures contribute to your program's survival? Please check all those that apply.

- |                          |  |            |       |
|--------------------------|--|------------|-------|
| <input type="checkbox"/> | Regular staff meetings   | How often? | _____ |
| <input type="checkbox"/> | Reliable, mature volunteers  |            |       |
| <input type="checkbox"/> | Strong management committee  |            |       |
| <input type="checkbox"/> | Good record keeping system   |            |       |
| <input type="checkbox"/> | Well-organized policy and procedures                               |            |       |
| <input type="checkbox"/> | Strong marketing and advertising to appropriate target populations |            |       |
| <input type="checkbox"/> | Procedures and forms set up before service commenced operations    |            |       |
| <input type="checkbox"/> | Experienced Staff  |            |       |
| <input type="checkbox"/> | Strong Leader in Organization                                      |            |       |
| <input type="checkbox"/> | Professional Management  |            |       |
| <input type="checkbox"/> | Other: _____   |            |       |
| <input type="checkbox"/> | Other: _____   |            |       |

### Obstacles

81. What do you consider to be the main obstacles to homesharing in Canada? Please rank all applicable answers, with 1 being the most important obstacle.

- \_\_\_\_\_ Lack of public awareness/misconceptions re: home sharing concept  
\_\_\_\_\_ Funding barriers  
\_\_\_\_\_ Legalities around home sharing, i.e., zoning by-laws.  
\_\_\_\_\_ Unrealistic expectations of clients  
\_\_\_\_\_ Lack of philanthropic giving in Canada  
\_\_\_\_\_ Other: \_\_\_\_\_

82. What other obstacle(s) do you think your program is faced with?

\_\_\_\_\_

### Adaptive Strategies

83. What adaptive strategies has your program used in the past two years to survive as a homesharing program in Canada? Please check all that apply.

#### Augmenting Revenues

- Implemented or increase client fees  
 Increased efforts to gain media attention re: to increase charitable donations  
 Appealed to new funding sources  
 Conducted special fundraising efforts  
 Increased board members participation in fundraising  
 Explored new grant funding opportunities

Adaptation to Unexpected Expenses or Funding Reductions

*Strategies to Increase Productivity*

- Initiated or increased staff training efforts

*Strategies Utilizing "Organizational Slack"*

- Increased staff workloads
- Increased reliance on volunteers
- Computerized record keeping to reduce personnel costs

*Strategies Involving Service Cutbacks*

- Eliminated or shrunk service
- Reduced Outreach
- Provided service on a first-come first-served basis

*Strategies to Acquire Power over Environment*

- Expanded networking with other agencies
- Restructured board of directors to recruit new and knowledgeable individuals
- Increased time making government contacts
- Joined a voluntary association for lobbying and unified action

*Other Strategies*

- Strategies to increase private donations
- Added Membership to organization
- Added new services and populations
- Added new management practices, i.e., strategic planning, professional leadership, SWOT analysis,
- Added new technology
- Added a marketing strategy
- Merged with another organization(s)
- Considered terminating agency

**☺ THANK YOU FOR YOUR TIME!☺**

**SIMON FRASER UNIVERSITY  
GERONTOLOGY RESEARCH CENTRE  
SURVIVING HOMESHARING PROGRAM TELEPHONE INTERVIEW**

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The external environment refers to the environment outside of the organization's boundaries, including social, cultural, political, economic, technological, and physical sectors. Often the external environment is examined to uncover the opportunities and the threats presented to the environment. Organizations rely on their external environment for human resources and funding. Depending on the environment's state: placid, variable, or turbulent, an organization has to respond to these environmental changes in order to survive. In this struggle to survive, organizations will change their activities and structures; to create a balance between themselves and their environments.

**EXTERNAL ENVIRONMENT**

- 1) Is the external environment of your agency predictable?
- 2) Does the organization have a monopoly in its catchment
- 3) Has there been a recent and sudden change in the environment?

**EXTERNAL RESOURCES**

- 4) Is there external political support for your organization?
- 5) Is there external opposition to your organization?
- 6) Is there a history of homesharing in your external environment?
- 7) How does the external environment provide resources for your organization?

**HISTORY OF ORGANIZATION**

- 8) What have been some of your organization's major achievements and milestones to date?
- 9) What have been some of your biggest struggles to date, as an organization?
- 10) Which obstacles have changed?
- 11) Has your organization been recognized in the past 5 years?
- 12) Has there been a rapid growth or decline in your agency?
- 13) Is there internal conflict over ideas, decisions?
- 14) Is internal stress high?

**OBJECTIVES**

You mentioned that your objective(s) has (have) changed. In what ways do these objectives differ from the original one(s)?

- 15) Why was there a change in objective?

- 16) To what extent do you feel you are meeting your organization's objectives? Do you have data to support this?

#### **MANAGEMENT**

- 17) What areas in your management or operational procedures could be improved?

#### **STRATEGIC PLANNING**

- 18) How do you know if the strategy is applied in your organization on a regular basis?

#### **MISSION STATEMENT**

- 19) Who was involved in creating the mission statement and objectives?
- 20) Do you think the staff are devoted to the mission?

#### **LEADERSHIP**

- 21) What type of impact has (or not having) a strong leader had on the organization?
- 22) Are decisions in the organization/department made unilaterally or collaboratively?

#### **STAFFING AND VOLUNTEERS**

- 23) Do they feel they do meaningful work?
- 24) Are there regular employee performance evaluations?
- 25) Do you have the resources to pay your staff properly?
- 26) Do volunteers feel a sense of ownership at the organization?
- 27) You mentioned a change in staffing, why did this change occur?
- 28) You mentioned a change in volunteer numbers, what prompted this change?

#### **LEARNING**

- 29) How does the organization support training for staff and the board, e.g. offer in-house training, encourage outside training?
- 30) Does the organization have a system for preventing and/or red-flagging potential problems?
- 31) Does the organization appear to learn from its mistakes?
- 32) Does the organization/department understand client ideas/feedback on how to improve the program?

33) And do they utilize it?

34) How about staff ideas/feedback on how to improve the program? And do they utilize it?

### **SPONSORING**

35) Why was there a change in sponsorship?

### **FUNDING**

36) What difficulties have you encountered in pursuing these different funding sources?

37) Are you currently pursuing new sources of funding?

Yes     No

38) If YES, have you had any success?

39) If you are receiving funding from outside sources, e.g., government, private donors, etc., do you have any concerns regarding the stability of this funding?

### **ACCOUNTABILITY**

40) Is the organization/department accountable to its clients?

41) To the community?

42) To its funders?

### **MARKETING**

43) Please describe how your organization implements a marketing program which matches your mission and goals and with the needs of your target population?

44) How do potential clients find out about your program and services?

45) How has your marketing affected your homesharing program?

### **TECHNOLOGY**

46) Do you think your organization's level of technology (e.g. computes, software) is suitable to carry out your day-to-day functions?

47) Do you feel that your staff's technological proficiency is adequate in your organization?

## **RESTRICTIONS**

- 48) You mentioned changes in your restrictions. Please indicate which ones have changed and why did they change?
- 49) You mentioned changes in your activities. Please indicate what activities have been added, omitted, or otherwise changed?

## **COUNSELLING**

- 50) Why do you think counselling is important for matchmaking?

## **RECORD KEEPING AND EVALUATION**

- 51) What was measured in your evaluation and what were your findings?



**APPENDIX D -- WRITTEN QUESTIONNAIRE (CLOSED HOMESHARING PROGRAMS)**

**SIMON FRASER UNIVERSITY  
GERONTOLOGY RESEARCH CENTRE  
CLOSED HOMESHARING PROGRAM QUESTIONNAIRE**

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**NAME OF HOMESHARING ORGANIZATION**

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**ORGANIZATIONAL MOTIVATION**

This first section is going to ask questions regarding the deceased organization's history, mission and objectives.

**History of Organization**

1. When did the home sharing program begin operation?

\_\_\_\_\_ Month \_\_\_\_\_ year

2. When did the home sharing agency close?

\_\_\_\_\_ Month \_\_\_\_\_ year

3. What was the reason for the organization's dissolution?

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4. Was the homesharing program a "stand-alone" program, i.e., it only offered homesharing services

Yes (go to Q. 10)  No

5. What type of organization ran the homesharing program?

- Housing Help Centre for seniors  
 Housing Help Centre for any population  
 Seniors Centre  
 Other (please specify): \_\_\_\_\_

6. What other type of services besides homesharing did the organization offer?

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**Mission Statement**

**QUESTIONS 7 TO 9 FOR ONLY THOSE HOMESHARING PROGRAMS RUN BY A MULTI-SERVICE ORGANIZATION**

7. Did your multi-service organization have a written mission?  
 Yes     No     Don't know (If No or don't know, Go to Q. 13 )
8. Was the multi-service organization's mission statement updated on a regular basis?  
 Yes     No     Don't know
9. Did the staff and the board identify with the mission?  
 Yes     No     Don't know

**QUESTIONS 10 TO 12 FOR ALL "STAND ALONE" HOMESHARING PROGRAMS**

10. Did your homesharing organization have a written mission?  
 Yes     No     Don't know (If No or don't know, Go to Q. 13 )
11. Was your mission statement updated on a regular basis?  
 Yes     No     Don't know
12. Did the staff and the board identify with the mission?  
 Yes     No     Don't know

**Objectives**

13. Please rank the importance of the closed homesharing program's objective(s)? A rank of (1) is considered the most important objective. Only rank those objectives that applied to the program.
- \_\_\_ a) To increase the supply of affordable housing
  - \_\_\_ b) To relieve problems of isolation for older people
  - \_\_\_ c) To enable older people to remain independent in the community
  - \_\_\_ d) To provide services to older persons/others in need
  - \_\_\_ e) Other \_\_\_\_\_
  - \_\_\_ f) Other \_\_\_\_\_

**ORGANIZATIONAL CAPACITY**

The following section will examine strategic planning, leadership, governance and niche management and human resources in the closed homesharing program

**Strategic Planning**

**QUESTIONS 14 TO 18 FOR THOSE HOMESHARING PROGRAMS RUN BY A MULTI-SERVICE ORGANIZATION**

14. Did the multi-service organization have a strategic plan?  
 Yes     No     Don't know (If No, Go to Q. 24 )

15. To what degree was the multi-service organization's board of directors involved in the development of the strategic plan?

- Very Involved       Somewhat Involved       Not Involved       Don't know

16. To what degree did the board members support the strategic plan?

- Supported it a lot       Supported it a little bit       Did not support it       Don't know

17. To what degree did the staff support the strategic plan?

- Supported it a lot       Supported it a little bit       Did not support it       Don't know

18. To what degree did the volunteers support the strategic plan?

- Supported it a lot       Supported it a little bit       Did not support it       Don't know

**QUESTIONS 19 TO 23 FOR "STAND ALONE" HOMESHARING PROGRAMS ONLY**

19. Did the homesharing program have a strategic plan?

- Yes       No       Don't know (If No, Go to Q. 24)

20. To what degree was the homesharing board of directors involved in the development of the strategic plan?

- Very Involved       Somewhat Involved       Not Involved       Don't know

21. To what degree did the board members support the strategic plan?

- Supported it a lot       Supported it a little bit       Did not support it       Don't know

22. To what degree did the staff support the strategic plan?

- Supported it a lot       Supported it a little bit       Did not support it       Don't know

23. To what degree did the volunteers support the strategic plan?

- Supported it a lot       Supported it a little bit       Did not support it       Don't know

**Leadership**

24. Did a single executive head the homesharing program?

- Yes (Go to Q. 27 )       No

25. If NO, who ran the homesharing program?

\_\_\_\_\_

26. What was their position or role in the homesharing program?

\_\_\_\_\_

27. Had there been more than two executive directors in the last five years, prior to closing?

- Yes       No

28. Had there been a major leadership crisis within the last five years, prior to closing?

Yes  No

29. Was the executive director a professional? (New)

Yes  No

30. If "Yes", what was his/her profession?

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### **Governance**

31. Was the homesharing program governed by:

- A board of directors for the multi-service organization and the homesharing program was among their programs to govern (Go to Q. 32)
- A board of directors solely for the homesharing program (Go to Q. 37)

### **QUESTIONS 32 TO 36 ONLY FOR THOSE HOMESHARING PROGRAMS RUN BY A MULTI-SERVICE ORGANIZATION**

32. To what degree was the multi-service organization concerned about recruiting effective board members?

Very concerned  Somewhat concerned  Not concerned at all  Don't know

33. Was there an orientation for new board members?

Yes  No  Don't know

34. Had the multi-service organization's board been restructured in the past five years?

Yes  No  Don't know

35. To what degree were the board members skilled in nonprofit governance?

Very skilled  Somewhat skilled  Unskilled  Don't know

36. To what degree did the board of directors understand the importance of the environment and its influences on the organization

Completely understood  Somewhat understood  Did not understand  Don't know

### **QUESTIONS 37 TO 41 FOR ALL STAND-ALONE HOMESHARING PROGRAMS**

37. To what degree was the homesharing program concerned about recruiting effective board members?

Very concerned  Somewhat concerned  Not concerned at all  Don't know

38. Was there an orientation for new board members?

Yes  No  Don't know

39. Had the homesharing program's board been restructured in the past five years?

Yes  No  Don't know

40. To what degree were the board members skilled in nonprofit governance?

- Very skilled    Somewhat skilled    Unskilled    Don't know

41. To what degree did the board of directors understand the importance of the environment and its influences on the organization

- Completely understood    Somewhat understood    Did not understand    Don't know

**Niche Management**

42. How did the homesharing program market its services? (Check all that apply)

- |  |   |
|--|---|
| <input type="checkbox"/> Radio/Television          | <input type="checkbox"/> Community information displays |
| <input type="checkbox"/> Flyer Distribution        | <input type="checkbox"/> Press Release                  |
| <input type="checkbox"/> Local Newspaper           | <input type="checkbox"/> Word of Mouth                  |
| <input type="checkbox"/> Posters in the Community  | <input type="checkbox"/> Web Page                       |
| <input type="checkbox"/> Outdoor/Bus advertisement | <input type="checkbox"/> Other: _____                   |
| <input type="checkbox"/> Direct mailing            |   |
| <input type="checkbox"/> Telephone                 |   |

**Human Resources**

43. What was the highest number of paid and volunteer staff during the operation of the homesharing program?

Staff Job Title	Responsibilities	Full-time/ Part-time
_____	_____	_____
_____	_____	_____
_____	_____	_____

Volunteer Job	Responsibilities	Hours/week
_____	_____	_____
_____	_____	_____
_____	_____	_____

43. Did the homesharing program include job descriptions for all staff?

- Yes    No

44. Did the staffing numbers change during the program's operation?

- Yes    No

45. Did the homesharing program include job descriptions for all volunteers?

- Yes    No

46. Did your volunteer numbers change during your agency operation?

- Yes    No

**CORE RESOURCES**

This next section is going to ask you about the closed homesharing program's sponsorship and funding sources

Sponsorship

47. Did the home sharing program have a sponsoring agency?

- Yes       No (If NO, Goto Q. )

48. If YES, do you remember who were the sponsors of the homesharing program?

Name(s): \_\_\_\_\_

49. What form of sponsorship was it?

- |                             |                              |                          |                            |
|-----------------------------|------------------------------|--------------------------|----------------------------|
| a) <input type="checkbox"/> | Regional Municipality        | <input type="checkbox"/> | Housing Department         |
|                             |                              | <input type="checkbox"/> | Planning Department        |
|                             |                              | <input type="checkbox"/> | Seniors Department         |
|                             |                              | <input type="checkbox"/> | Social Services Department |
| b) <input type="checkbox"/> | Private, non-profit agency   | <input type="checkbox"/> | Seniors Organization       |
|                             |                              | <input type="checkbox"/> | Family/Community Service   |
|                             |                              | <input type="checkbox"/> | Community Group            |
|                             |                              | <input type="checkbox"/> | Church                     |
|                             |                              | <input type="checkbox"/> | Health Service             |
|                             |                              | <input type="checkbox"/> | Housing Service            |
| c) <input type="checkbox"/> | Autonomous non-profit agency |                          |                            |
| d) <input type="checkbox"/> | Commercial Operation         |                          |                            |

50. What resources did the sponsors provide for the homesharing program: (Please check all that apply)

- |                          |                               |                          |             |
|--------------------------|-------------------------------|--------------------------|-------------|
| <input type="checkbox"/> | Office Space/and or free rent | <input type="checkbox"/> | Bookkeeping |
| <input type="checkbox"/> | Office Equipment              | <input type="checkbox"/> | Volunteers  |
| <input type="checkbox"/> | Staff -- home sharing         | <input type="checkbox"/> | Financial   |
| <input type="checkbox"/> | Staffing management           | <input type="checkbox"/> | Other _____ |
| <input type="checkbox"/> | Secretarial assistance        |                          |             |

51. Did the program experience a change in sponsoring agency, sponsorship status or both? Please circle.

52. Was the sponsoring agency supportive with respect to the homesharing program

- Very supportive  
 Somewhat supportive  
 Not very supportive

**Funding**

53. Do you remember the approximate overall funding for the homesharing program over one year? Please outline all sources of funding with approximations where applicable.

Government Contracts: \_\_\_\_\_

Charitable Contributions: \_\_\_\_\_

Client Fees: \_\_\_\_\_

Public Grants: \_\_\_\_\_

Private Grants: \_\_\_\_\_

Other Sources: (please specify): \_\_\_\_\_

54. Did the homesharing program have a cushion fund for lean times?

Yes  No

**Technology**

55. Did the homesharing program use computer technology in its every day operations?

Yes  No

56. Did the homesharing program have a web site

Yes  No

**Planning**

57. Did the homesharing program complete a needs assessment prior to developing its program?

Yes  No

**MONITORING AND EVALUATION**

58. Please indicate if the program tracked the following information on your clients or agency operations. If you answered yes, please indicate any approximations in the space provided.

	Yes	No	Findings
The number of people who inquired about homesharing, on average, per month			
The reasons for their inquiries			Please list reasons
The number of interviews conducted, on average, per month			
The number of introductions required to make one match			
The number of people registered and the number of people actually matched			
Why people decided not to homeshare			Please list reasons

59. Was your homesharing program disciplined/rigorous regarding the following systems:

Personnel	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Budget	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Managing time	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Governance	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No

60. Did the homesharing program seek evaluation of its programs?

Yes     No

61. Did the homesharing program actively measure outcomes?

Yes     No

62. What did you consider to be the most important impact of your home-sharing agency in your community? ?  
Please check only one answer.

- Increases housing options/availability of housing units
- Offers companionship and sense of security to clients
- Assists low income people in need of housing
- Helps people waiting for non-profit or institutional placement
- The impact of home sharing is small, but the potential is there
- Other: \_\_\_\_\_

#### PROGRAM SERVICES

This following section will look at the homesharing programs and services, including client criterion, restrictions, matchmaking activities, and additional services,

#### Client Selection Criterion

63. What were the primary target population(s) for your program (check all that apply, but don't read)?

- No Target Population
- Well Older persons (age: \_\_\_\_\_)
- Frail Elderly (define: \_\_\_\_\_ )
- Single Parent Families
- Persons with disabilities
- University Students
- Newcomers to Canada
- Other: \_\_\_\_\_

64. What was your program's catchment area? \_\_\_\_\_



**Match-Making Activities**

65. Please indicate which of the following activities the homesharing program used:

	YES	NO
• Interview each client	<input type="checkbox"/>	<input type="checkbox"/>
• Conduct in-depth home interviews	<input type="checkbox"/>	<input type="checkbox"/>
• Reference checks:		
Medical	<input type="checkbox"/>	<input type="checkbox"/>
Landlord	<input type="checkbox"/>	<input type="checkbox"/>
Police	<input type="checkbox"/>	<input type="checkbox"/>
Personal	<input type="checkbox"/>	<input type="checkbox"/>
• View home providers home	<input type="checkbox"/>	<input type="checkbox"/>
• View home seekers home	<input type="checkbox"/>	<input type="checkbox"/>
• Signing of disclaimer	<input type="checkbox"/>	<input type="checkbox"/>
• Referral of home sharers to each other	<input type="checkbox"/>	<input type="checkbox"/>
• Arranging introductions between potential clients	<input type="checkbox"/>	<input type="checkbox"/>
• Attend introductions between potential clients	<input type="checkbox"/>	<input type="checkbox"/>
• Organize introductory teas, socials	<input type="checkbox"/>	<input type="checkbox"/>
• Provide sample home sharers agreement	<input type="checkbox"/>	<input type="checkbox"/>
• Assist in drawing up home sharers agreement	<input type="checkbox"/>	<input type="checkbox"/>
• Arrangement of trial periods	<input type="checkbox"/>	<input type="checkbox"/>
• Follow-Up to see how match is progressing	<input type="checkbox"/>	<input type="checkbox"/>
• Method: phone calls	<input type="checkbox"/>	<input type="checkbox"/>
Home visits	<input type="checkbox"/>	<input type="checkbox"/>
Match evaluation questionnaire	<input type="checkbox"/>	<input type="checkbox"/>
• Mediation of disputes	<input type="checkbox"/>	<input type="checkbox"/>

66. Did your matchmaking activities change during the program's operation?

Yes     No

67. Was the matchmaking service free?

Yes     No    If "NO", How much did the program charge?  
\_\_\_\_\_

**Additional Services/Information Provided To Clients**

68. Did the homesharing program provide counselling to clients?

Yes     No    (If NO, go to Q. 65)

69. If YES, what type of counselling?

- Housing options counselling
- Community services information and education
- Inter-personal skills for home sharing
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_

70. Do you think a referral and counselling model is more effective than a referral only model for homesharing programs?

Yes       No

71. Why?

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72. Did the homesharing program routinely refer clients to other services?

Yes       No (If No, go to Q. 69)

73. If YES, what other services do you refer your clients to:

- |   |  |
|---|--|
| <input type="checkbox"/> Legal                  | <input type="checkbox"/> Home support agencies       |
| <input type="checkbox"/> Medical                | <input type="checkbox"/> Education/employment        |
| <input type="checkbox"/> Income assistance      | <input type="checkbox"/> Family/Personal counselling |
| <input type="checkbox"/> Other housing services | <input type="checkbox"/> Credit/Financial management |
| <input type="checkbox"/> Seniors Centers        | <input type="checkbox"/> Other: _____                |
| <input type="checkbox"/> Drug/alcohol Centre    |  |
| <input type="checkbox"/> Social workers         |  |

## **SURVIVAL OF HOMESHARING AGENCIES IN CANADA**

### **Management and Operational Success**

74. In your opinion, what operational and management procedures contributed to the homesharing program ceasing in operation? Please check all those that apply.

- Irregular staff meetings
- Strong management committee
- Poor or little record keeping system
- Lack of policy and procedures
- Weak marketing and advertising to appropriate target populations
- Lack of procedures and forms set up before service commenced operations
- Inexperienced Staff
- Lack of strong leader in Organization
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_

75. What do you consider the primary obstacles to homesharing in Canada? Please rank from 1 - 5, with 1 being the most important obstacle.

- \_\_\_\_\_ Lack of public awareness/misconceptions re: home sharing concept
- \_\_\_\_\_ Funding barriers
- \_\_\_\_\_ Legalities around home sharing, i.e., zoning by-laws.
- \_\_\_\_\_ Unrealistic expectations of clients
- \_\_\_\_\_ Lack of philanthropic giving in Canada

76. What other obstacles did you think the homesharing program was faced with?

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## Adaptive Strategies

77. What adaptive strategies did the homesharing program use prior to its closing? Please check all that apply.

### Augmenting Revenues

- Implemented or increase client fees
- Increased efforts to gain media attention re: to increase charitable donations
- Appealed to new funding sources
- Conducted special fundraising efforts
- Increased board members participation in fundraising
- Explored new grant funding opportunities

### Adaptation to Unexpected Expenses or Funding Reductions

#### *Strategies to Increase Productivity*

- Initiated or increase staff training efforts

#### *Strategies Utilizing "Organizational Slack"*

- Increased staff workloads
- Increased reliance on volunteers
- Computerized record keeping to reduce personnel costs

#### *Strategies Involving Service Cutbacks*

- Eliminated or shrink service
- Reduced Outreach
- Provided service on a first-come first-served basis

#### *Strategies to Acquire Power over Environment*

- Expanded networking with other agencies
- Restructured board of directors to recruit new and knowledgeable individuals
- Increased time making government contacts
- Joined a voluntary association for lobbying and unified action

#### *Other Strategies*

- Marketed strategies to increase private donations
- Added Membership to organization
- Added new services and populations
- Added new management practices, i.e., strategic planning, professional leadership, SWOT analysis,
- Added new technology
- Added a marketing strategy
- Merged with another organization(s)

**😊 THANK YOU FOR YOUR TIME!😊**