Evaluation of the Homeshare Pilot: Interim Evaluation

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In early 2023 the Office for Seniors (OfS) commissioned the Homeshare pilot delivered by Age Concern Auckland. This report presents an interim evaluation of the pilot, to review how the programme has been implemented and delivered, and what can be learned from the pilot to inform future policy and funding decisions.

Age Concern Auckland's homeshare documents, administrative data and quarterly reporting to OfS were reviewed. Interviews were conducted with Age Concern Auckland staff in August 2023 and May 2024. An interview was also conducted with Homeshare Australia and New Zealand Alliance (HANZA) representatives, to understand their support role for the pilot and the wider context of establishing and operating homeshare programmes.

Since no homeshares were established at the time of the evaluation, no homeshare participants could be interviewed. To gain some insight into participants' experiences, one householder involved in the matching process was interviewed. Analysis of barriers, opportunities, and enablers of homeshare establishment, implementation, delivery and sustainability was informed by interviews with three NZ organisations that have initiated a small number of homesharing arrangements.

Age Concern Auckland and the other NZ homeshare providers have identified householders', sharers' and families' interests in Homeshare and note its benefits, not only for ageing in place but also intergenerational benefits.

The Age Concern Auckland Homeshare pilot has been generally implemented as planned although it has varied in some ways from how it was intended to operate as set out in policies and manuals provided by HANZA. Changes have been made to improve operational processes, and to better meet the needs of the communities in which the programme operates.

Programme participants

- By late May 2024, no homeshare arrangement had been achieved, despite two matches having been made. Those matches did not eventuate in a homeshare. Four potential matches were going through vetting processes. In addition, there was a pool of nine householders and four sharers still to be matched.
- Most householders in the matching pool are in their 80s and 90s. They are mostly NZ European.
- Potential sharers often have a pressing need for housing, as their current accommodation is unaffordable or in other ways unsuitable. Most of the potential sharers are women, ranging in age from late 30s to 60s. Sharers' ethnic backgrounds are more varied than the older householders.
- Location is very important to sharers. Most are looking for a homeshare in the area where they have existing connections.
- Both householders and sharers have a preference to share with women. Householders express a preference for older sharers, aged 50 and over.

Connecting the programme with different ethnic and cultural communities has proceeded slowly, as the priority has been to establish the programme first. Currently Homeshare staff are working with Age Concern's Asian services to link them more formally with the programme, with the aim of offering Homeshare in the Asian community.

What is working well

- Programme elements were tested and refined throughout the first year of implementation and operation. HANZA programme manuals and procedures required additional design work to adapt documentation to the NZ context. Changes also needed to be made to HANZA data collection instrumentation and to Age Concern's data collection and monitoring processes to align with the pilot's information and reporting needs.
- To manage risks, Age Concern made changes to policies and operational procedures. Changes have included: consideration of the age of sharer eligibility; adapting the vetting process for international students; adapting forms to ensure essential information is collected and to reduce duplication; adding terms and conditions to the sharing agreement; and setting up data collection and recording processes.
- Promotional and marketing activities have changed over time to focus more intently on community-based advertising, expanding channels to reach sharers, and tailoring advertisements to find sharers for individual householders. Different marketing strategies have been developed to reach older householders and sharers. Extending the range of approaches to generate enquires has been effective.
- Training and on-going support provided by HANZA has helped staff increase their understanding of Homeshare and their ability to implement it.
- Homeshare's location within Age Concern Auckland has enabled the programme to benefit from the organisational infrastructure, and the support, skills and networks of other teams.
- The pool of prospective Homeshare participants is growing. Considerable efforts have been made to respond to enquiries and complete assessments to increase the pool.
- The way that Age Concern works with householders was praised by the older householder interviewed for this evaluation, who gave positive feedback about information and support provided.

Key challenges

There are fundamental challenges to address if Homeshare's sustainability is to be assured.

- Lack of public awareness and knowledge of Homeshare is a major challenge. Considerable time is needed to intensively socialise the homeshare concept within communities before attempting recruitment.
- The pool of sharers must be big enough to enable suitable matches to be made. If the pool is too small it is very difficult to find a compatible match for a householder. The pool of sharers is volatile, since sharers' personal situations can change suddenly and this affects their ability to participate in a homeshare.
- Age Concern has struggled to maintain adequate staff capacity for the programme, due to staff recruitment issues.
- Operating the programme is very time and resource intensive in the establishment, implementation and recruitment/matching stages. Considerable time has been required for marketing and promotional activities, assessments, matching, interviews and introductions, as well as for making changes to HANZA documentation. These time requirements were not anticipated by Age Concern.
- Several policy issues have needed addressing including: the impacts of the sharer's contribution on the older householder's Living Alone allowance and Disability allowance; insurance implications for both the householder and sharer; and the implications of

tenure for those householders living in a home not owned by them. Issues and risks have also been identified around managing exit from a homesharing arrangement.

- Auckland's large geographical area with its diverse communities requires time and resource investment, and affects how and where to promote Homeshare.
- While programme funding has been sufficient, there have been unexpected costs associated with additional work needed on documentation changes. There may be future expenditure on the translation of communications and marketing materials for different ethnic groups, as well as translation of the sharing agreement.

Critical programme factors

The critical factors for a successful Homeshare programme are:

- A sustained funding stream.
- A clearly defined and articulated programme philosophy, strategy and goals.
- Robust policy and operational guidance and manuals tailored to the specific characteristics and needs of the communities served.
- Risk identification and management strategies.
- Organisational leadership and commitment at all levels from board, CEO, managers, and staff.
- Appropriate staffing levels and skill mix for the service provided and communities served. Appropriate staff training and support are critically important.
- Community-based marketing and promotion campaigns targeted to householders and sharers. Socialisation of the homeshare concept in the community is essential as there is low public awareness and understanding of the programme.
- Robust programme monitoring and reporting processes that both meet contractual reporting needs and align with the organisation's existing data collection and monitoring processes.

Recommendations for programme sustainability and transferability

If Homeshare is established as a programme, the implementation of a cross-sectoral, support infrastructure should be considered. It is recommended that the agency that commissions and funds a future Homeshare programme:

- Works on establishing funding pathway options for Homeshare.
- Ensures that funding includes provision for the range of resources required for programme establishment and implementation, including staffing needs, training and support.
- Develops and promulgates standardised policy and operational guidance, tools, templates and manuals tailored to the NZ context and responsive to the specific characteristics and needs of the communities served. Guidance needs to address gaps identified in this evaluation, such as:
    - Specification of how to manage issues concerning older householders' eligibility for various government income support payments.
    - Procedures for risk identification and management. Areas specifically identified as needing risk management strategies are: householders' and sharers' expectations; family expectations and dynamics; abuse or exploitation of participants (both households and sharers); and managing exit from a homesharing arrangement. Risk management strategies should clearly set out risk likelihood and implications,

the extent and limit of Age Concern's responsibilities, as well as risk management procedures.

  - Time recording templates to identify the range of tasks required for implementing and operating the programme and recording the time needed.
  - Robust programme monitoring and reporting processes and templates that both meet contractual reporting needs and can be aligned with the provider's existing data collection and monitoring processes.
  - Recording and promulgating good practice and real examples of 'what works'.

Homeshare programme providers have a critical role and responsibility to ensure the sustainability of their programme. It is recommended that programme providers:

- Ensure that there is a clearly defined and articulated programme philosophy, strategy and goals for Homeshare, that includes strong alignment with local needs and community demographics, including cultural diversity.
- Clearly define the geographical area and/or community that the programme will cover and use this as a test-bed for implementation and achieving matches before expanding the programme.
- Ensure there is a programme coordinator/lead, preferably as a fulltime position. Establish and maintain required staffing levels and skill mix for the service provided and communities served.
- Ensure appropriate staff training and support are provided. There may need to be professional development for specific programme activities such as matching, or sudden events, such as crisis management or conflict resolution.
- Develop community-based marketing and promotion campaigns targeted in ways to best reach the different audiences of householders and sharers. This is firstly to socialise the homeshare concept in the community and secondly to facilitate appropriate matches.
- Provide information to local agencies, organisations and services about Homeshare to increase their understanding, awareness and support for the programme, and ensure appropriate referrals.
- Consider how local organisations could be active supporters of Homeshare through partnering to provide resources and expertise.
- Engage with families of older people to raise their awareness of the programme and manage expectations or risks.

1. Introduction

Homesharing is a type of shared living, where an older person, usually a homeowner, shares their home with another person (the sharer) in a formal arrangement, established through an organisation. Often the organisation provides on-going support for the homesharing arrangement.

Homeshare programmes are based on principles of companionship, mutual benefit, and a safe and secure home environment for both the older householder and sharer. Homesharing enables ageing-in-place and enhances social connection for the older householder, while also providing reciprocal benefits to the sharer, including a stable, affordable home. A key feature of homesharing is that the sharer provides some low-level practical help and companionship in exchange for free or low-cost housing. However, the sharer is not a live-in carer. Nor is the arrangement a substitute for the older person accessing formal home-based care services or other services if needed.

While homesharing programmes have been operating overseas for 25-30 years, in NZ homesharing is a recent innovation. In early 2023 the Office for Seniors (OfS) commissioned the Homeshare pilot delivered by Age Concern Auckland. This report presents an interim evaluation of the pilot, to review how the programme has been implemented and delivered, and what can be learned from the pilot to inform future policy and funding decisions.

This report is structured as follows:

- Section 2 outlines the evaluation purpose, scope and method.
- Section 3 describes the Homeshare pilot programme logic.
- Section 4 describes programme development, implementation and activities.
- Section 5 describes the characteristics of those participating in Homeshare, the householders and sharers.
- Section 6 reports on key issues and challenges in establishing the pilot.
- Section 7 identifies the important factors enabling establishment and delivery.
- Section 8 presents the evaluation's conclusions and makes recommendations for improving the functioning of homeshare programmes.

2. Evaluation purpose, scope and method

Originally, the purpose of the evaluation was to review:

- Whether the programme has been successfully delivered according to the programme's overall goals and objectives. Expected programme benefits and outcomes are specified in the RFP and provider contract as follows:
  - Householder participants' ability to continue to live in their homes with 'homeshare' support, including reduced or delayed need for health and aged residential care services.
  - Homesharer participants' access to affordable (low or no cost) accommodation in exchange for providing an agreed level of support.
  - For both householders and homesharers, the potential for improved social connection, companionship and feeling of safety, and benefits of an intergenerational living arrangement (where relevant).

  - Efficient utilisation of existing housing stock.
- How well the programme's performance measures have been met, as set out in the provider contract.
- How cultural perspectives have been considered in the development and implementation of the pilot, and their contribution to its success.
- What can be learned from the pilot to inform future policy and funding decisions, including programme viability and transferability.

Elements of the evaluation were revised to reflect the status of the programme and the anticipated projection of implementing and delivering the Homeshare programme, because no homeshare arrangements were established during the duration of the evaluation. That was to be expected, given the trajectories common among these sorts of initiatives (Coffey, 2010), but the consequence was that no homeshare participants could be interviewed. Nor could performance measures and expected programme benefits and outcomes for householders and sharers as set out in Age Concern's contract with OfS be analysed. It is expected, that if the pilot is extended, future evaluation will be conducted, which focuses on delivery and outcomes.

Consequently, this is a formative evaluation. That is, it focuses on the programme's logic, examines how the programme has been implemented and delivered, considers whether is it working as expected, and comments on what can be learned so far to improve programme delivery and effectiveness. The key areas of the evaluation are:

i. Establish the Homeshare programme logics and activities. This is separately reported in "Homeshare Programme Logic", 15 September 2023.

ii. Assist Age Concern Auckland to develop a robust data collection methodology, enabling them to meet their contractual reporting requirements while still supporting day-to-day programme delivery. This involved review of the reporting requirements set out in the contract with Age Concern Auckland, identification of potential gaps in data collection and providing advice to Age Concern on requirements of the data variables to be included as well as an appropriate database to store this information. This review is separately reported in "Homeshare Programme: Data Collection and Reporting", 2 October 2023.

iii. Describe the programme's key activities, processes and characteristics.

iv. Identify programme features critical for programme sustainability and transferability.

This evaluation report focuses on items iii. and iv. It refers to the reports produced in i. and ii. for supporting material and analysis.

The main methods for collecting data were through Age Concern Auckland's homeshare documents, administrative data and quarterly reporting to OfS, and interviews.

Three interviews were conducted with Age Concern Auckland staff, in August 2023 and May 2024. Staff included the Homeshare Lead, Social Connections Manager, Social Connections Coordinators and Volunteer Coordinator (See Appendix 1 for question topics). It was intended to interview communications staff, however difficulties Age Concern has experienced in recruiting the communications role prevented this.

One interview was conducted with two Homeshare Australia and New Zealand Alliance (HANZA) representatives, the Director and Homeshare Development Officer, and the HANZA chair, to understand their support role for the pilot and the wider context of establishing and operating homeshare programmes (See Appendix 2 for question topics). HANZA, the peak body for homeshare programmes operating in Australia and New Zealand, was commissioned by OfS to support the establishment of the Age Concern Homeshare pilot. HANZA provides a range of manuals, resources and training support.

Since no homeshares were established at the time of the evaluation, no homeshare participants could be interviewed. To gain some insight into participants' experiences, one householder involved in the matching process was interviewed (see Appendix 3 for question topics).

Analysis of barriers, opportunities, and enablers of homeshare establishment, implementation, delivery and sustainability has been informed by interviews with three NZ organisations that have initiated a small number of homesharing arrangements (Homeshare for Her Nelson, Eastern Bay Villages, Age Concern Hawkes Bay). Appendix 4 presents the findings from those interviews, which are also discussed in Sections 6 and 7.

3. The Homeshare pilot programme logic

The Homeshare pilot covers the same area as Age Concern Auckland, which is most of the Auckland Council area, from the southern border and north to Rodney. The northern part of the Council's area is covered by another Age Concern.

Age Concern Auckland had two main objectives that it wanted a Homeshare programme to achieve:

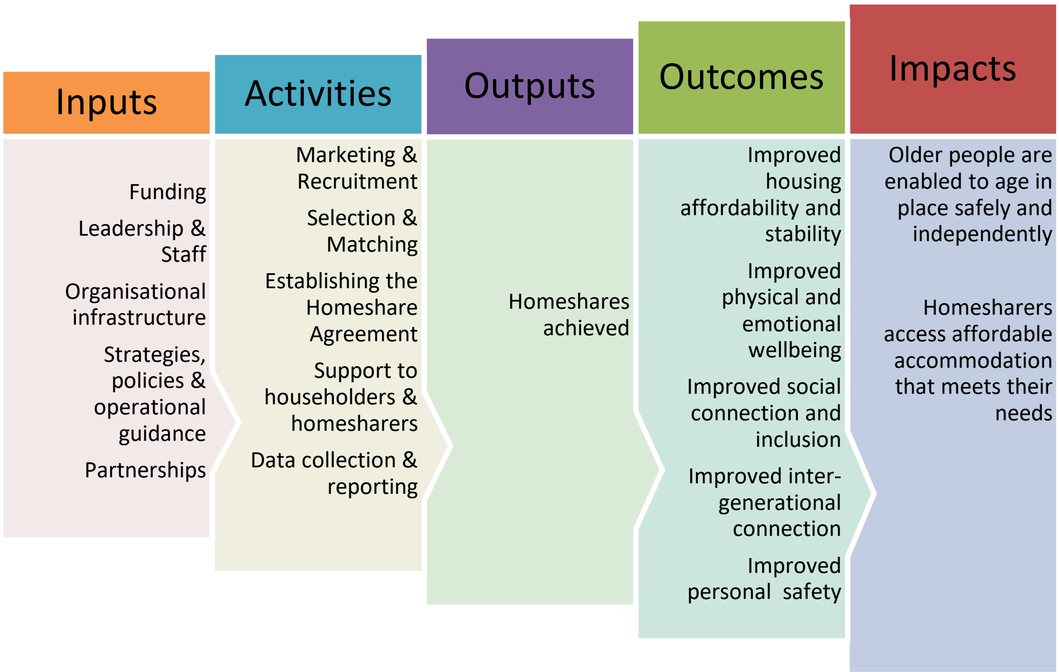
- Addressing loneliness and social isolation among older people, and lack of practical support from them.
- Providing a housing option for older people that enables them to stay in their homes and communities for longer.

Age Concern staff commented that most of the seniors they work with are aged over 80 and have long-term health conditions or disabilities. Many would benefit from a sharer's support. Staff were also awareness of younger people needing affordable accommodation and the lack of housing supply in Auckland, particularly for young people with limited means such as students.

The Homeshare pilot was set up to provide a comprehensive service, not just to facilitate contact between older householders and sharers. The programme's core activities include promotion, screening, vetting, and matching services, as well as support for the householder and sharer once the homesharing arrangement is established. On-going support can include mediation and assistance with termination of sharing arrangements.

A programme logic was prepared as part of the evaluation. This sets out the main components of the Homeshare programme, showing how inputs, activities and outputs work together to achieve outcomes, and potentially, community impacts (Figure 1).

Figure 1: Homeshare: Programme Components



4. Programme development, implementation and activities

This section provides an overview of:

- Programme funding
- Staffing and skills
- Promotion and advertising
- Enquiries, assessment and interviewing
- Matching and introductions.

Programme funding

The programme is fully funded through the contract with OfS, with the contract covering staffing and operational expenses.

Age Concern does not charge fees to the older householder or sharer, as current funding enables the programme to operate without charging a fee. As such the programme aligns with other Age Concern services, all of which are free. The need to charge a fee will be reviewed, as a consideration is whether future funding will be available and sufficient to cover programme costs.

Staffing and skills

The pilot sits within Age Concern's Social Connections service. The staff time allocated to the programme through the contract is 1.5 FTE. This was expected to comprise one full-time and one 0.5 position. However, this level of staffing has not eventuated and over the programme's duration staff hours dedicated to the programme has fluctuated. Although staff in the Social Connections team have assisted with Homeshare tasks, staff time has not reached the 1.5 FTE allocation.

The skills needed to operate the programme were identified by staff as including:

- Experience and knowledge of working with older people
- Working with volunteers
- Social work
- Counselling
- Conflict resolution
- Marketing and communications

To assist in skills development and knowledge of Homeshare, the pilot was established and implemented with the help of HANZA, which offers expert advice, support and capacity-building to organisations operating or aspiring to operate Homeshare programmes.[1] OfS contracted HANZA to provide expert advice, training and homeshare manuals to Age Concern Auckland. As well as accessing one-to-one specialised advice and support from HANZA, this arrangement also enabled Age Concern staff to join a community of practice network run by HANZA. Staff reported that the advice and training from HANZA has been invaluable in setting up the programme. The one-to-one support provided and community of practice meetings have been particularly helpful. Staff noted that specific training may be needed in future to work with Asian clients, and also other ethnic groups if enquiries are received from them.

Promotion and advertising

Staff started by promoting Homeshare through Age Concern channels including the newsletter, members, and stakeholder networks. Promotion then expanded with flyer drops in targeted areas, library noticeboards, presentations to local groups and organisations, and a presence at senior expos. In September 2023 a page about Homeshare was set up on the Age Concern website. A small number of enquiries were received through the webpage, however enquiries have increased due to a concentrated effort on promotional activities from March 2024. That has included the use of google ads and advertisements in community newspapers throughout Auckland.

To increase exposure of Homeshare to potential sharers, a tailored advertisement was run for one older householder living in a rural area in South Auckland. This tailored advertisement, posted on a local supermarket noticeboard and other community venues has garnered some response. It is intended to use this targeted strategy to find a suitable sharer for another older householder. Age Concern is also looking to do tailored advertisements in health centres.

There has been less use of social media, although use of Facebook community pages for tailored advertisements is increasing. Any use of social media must comply with Age Concern's policies.

In future, as part of Age Concern Auckland's 75th anniversary, Homeshare's online presence will be expanded with video interviews about the programme.

Enquiries, assessment, and interviewing

Most enquires about the programme come directly from older people, although increasingly enquiries and referrals originate from family members. Few referrals to the programme are made from other services, although Age Concern has received referrals from a GP, a social

[1] See The role of Hanza

service, and a hospital social worker. Other services operated within Age Concern also refer people to the programme.

All enquires are accepted and provided with a package of information about Homeshare, to ensure individuals understand the programme's purpose, how it works, and participants' rights and responsibilities. The nature of the programme as a pilot is also covered, including what will happen after the pilot end date. Prospective participants are assured that Age Concern will continue to support them after the pilot finishes.

Those who wish to proceed with Homeshare are interviewed and checked to see if they meet the criteria for the programme. The criteria for the householder are:

- aged 65 or older
- willing to share their home with another person
- their home is suitable for sharing
- they are living independently and not in need to high-level care
- if they are not the owner of the home, they have permission from the homeowner to have a sharer.

The criteria for the homesharer are:

- aged 18 and over
- have appropriate social and language skills
- willing to share a house with an older person
- willing to provide an agreed level of support to the householder in exchange for a lower accommodation cost.

Prospective participants are asked about their needs, motivations and reasons for their interest in the programme to ensure the programme is appropriate for them. Those who meet the criteria and wish to continue undergo a police check. Character references are sought from potential homesharers, but not from householders.

A few changes have been made to assessment processes. Initially, the programme settled on a lower age limit of 23 years for the sharer because this was thought to be a more mature age than 18, which is the minimum sharer age typical of Homeshare programmes. However, Age Concern received feedback from both potential sharers and householders that the lower age limit should be flexible, as younger people can be suitable as sharers. An added consideration from householders, was that they wanted to give an accommodation opportunity to younger people, including tertiary students. Consequently, the minimum age for sharers was set at 21.

The vetting procedure has been adapted for international students. Since they have passed police checks from their own country and by the university in order to study in NZ, those checks are deemed sufficient for participation in Homeshare. International students who have lived in NZ for more than one year are covered by a NZ police check.

Matching and introductions

Age Concern staff have experience in assessments and matching, since those processes are part of the organisation's volunteers programme. Similar skills and processes are used for Homeshare. The matching process involves sharer and householder meeting, firstly with an Age Concern staff member present and then without the staff member. Several meetings can occur between prospective sharer and householder. Sometimes meetings include family of the householder.

Staff are instrumental in not only facilitating matches, but also in assessing whether a match will work and gently facilitating exit if one party decides against the match. As one staff member said:

> *There must be a way that either party can call it off if they feel the match will not work … There has to be trust on the part of the sharer and owner that Age Concern will deal with it if there is not a possible match.*

5. Participants in Homeshare

By late May 2024, no Homeshare arrangement had been achieved, despite two matches having been made. The reasons for a match not proceeding to a homeshare were, in the first instance, change in the sharer's circumstances. They left NZ with the intention to return and move in with the older householder but were unable to do so. In the second instance, communication challenges suggested that the householder and sharer would struggle to sustain a sharing arrangement.

While no sharing arrangements have been established during the evaluation timeframe, there have been enquiries from prospective participants and the pool of both older householders and sharers is growing (Table 1).

Table 1: Numbers of Householders (H) and Sharers (S) engaging with Homeshare

	Quarterly Reporting Period							
Activities	**March-May 2023**		**July-Sept 2023**		**Oct-Dec 2023**		**Jan-March 2024**	
	H	**S**	**H**	**S**	**H**	**S**	**H**	**S**
Enquiries	37	7	15	13	9	6	12	12
Registrations	-	-	6	6	2	3	3	5
Assessments	-	-	9	6	2	3	1	3
Introductions	-	-	-	-	3	3	5	4

Data source: Age Concern Auckland Quarterly Reports

By late May 2024, four potential matches were going through vetting processes. In addition, there was a pool of nine householders and four sharers still to be matched.

An understanding of householders' and sharers' characteristics and their interests in Homeshare can be obtained from examining the enquiries Age Concern has received, and the matching pool. A brief description of householders and sharers is presented below.

Householders

Age Concern reports that, in general, the older householders interested in Homeshare have good family support, and are linked into services they need such as home-based care. Nevertheless, householders see the programme as benefitting them by way of practical help with small tasks around the home, such as changing a light bulb, or in the garden. Many of the householders emphasise the need for help with domestic tasks, more so than a desire for companionship.

Most householders that are in the matching pool are in their 80s and 90s, but one is between 65-70. There is a mix of men and women. Two are working, while the rest are retired. While most live alone, one couple is seeking a sharer. The householders are mostly NZ European, although two are Indian.

Householders want women sharers, and there is a preference for older sharers, aged 50 and over.

Vignette: a householder

M is a homeowner aged over 90 living on his own. He has a long-term health condition, which is managed. M receives some home-based support including a personal alarm, a cleaner and gardener, although he considers that having a sharer would help him to stay in his home longer. He is looking for some practical support such as cooking. Companionship, such as sharing a meal or watching TV together, would also be appreciated:

> *"The thing for me, I don't look after myself very well. I don't cook. I don't want to go into a rest home. I've lived here since 1973, it's where I want to hang my spurs when I die. My stamping ground, it's got everything I want."*

M's children are keen for a homesharing arrangement, as they would like someone staying in the house, to increase their father's safety. M too acknowledges it would be "good to have help in the house overnight if I have a fall."

M's first preference is for an overseas student. The accommodation and facilities provided to the sharer include their bedroom, bathroom and toilet for the sharer's own use, as well as shared use of living areas and facilities such as the television. M says that the home can be organised so that the sharer has privacy and can do their own activities, or spend time with M.

So far, M has found the service provided by Age Concern to be "really great". He commented on the thoughtful and kind way that staff have engaged with him. He expressed disappointment at the length of time taken to find a match, however emphasised that this is not a complaint. He understands the process is complex: "that's the way it is. It hasn't happened yet, but that's not for want of trying."

Sharers

Age Concern staff report that sharers often have a pressing need for housing, as their present accommodation is unaffordable or in other ways unsuitable.

Most of the potential sharers are women. They range in age from late 30s to 60s. Although most are single, one couple wish to enter the programme. Currently sharers are either living with family or renting. Some are working, while others are studying. Their ethnic backgrounds are more varied than the older householders, and include NZ European, Asian, South American, and Pacific people looking to share. Like the householders, sharers have a preference to share with women.

A primary consideration when matching sharers with householders is that location is important to sharers. Most sharers are looking for a homeshare in the area where they have existing connections. They have connections to work, services and social networks, and consequently most do not want to relocate. A few sharers are looking to relocate to a specific area to be closer to their connections, or to meet certain needs. Another consideration is that sharers are not only concerned about the location of their accommodation, but also the facilities that are offered in the accommodation.

The pool of sharers is volatile, since sharers' personal situations can change suddenly and this affects their ability to participate in a homeshare. This uncertainty has already been experienced in one match that did not proceed to a homesharing agreement, due to the sharer's change in circumstances. Such changes add complexity to the assessment and matching processes, which already take considerable time.

Families

As noted earlier, more family members are asking about Homeshare. Families see Homeshare as providing a level of care and support that they are not always able to provide.

In a few instances, family members have asked Age Concern to talk to their parent about Homeshare, believing that their elder would benefit from the programme, but the parent is not interested. In contrast, some parents are interested in Homeshare, but want to keep their conversations confidential.

Cultural considerations

Age Concern noted that while the householder group is not ethnically diverse, it has attracted Indian as well as NZ European participants. The group of sharers is more ethnically diverse, made up of people from various cultural backgrounds.

Staff observed that prospective Homeshare participants do not seem to have a cultural preference for whom they live with, being more interested in finding someone they can get along with. Nevertheless, it is acknowledged that people from certain cultural backgrounds may have preferences for a house mate that speaks their language and understands their dietary practices and preferences.

Connecting the programme with different ethnic and cultural communities has proceeded slowly, as the priority has been to establish the programme first. Currently Homeshare staff are working with Age Concern's Asian services to link them more formally with the programme, with the aim of offering Homeshare in the Asian community. Although many Asian communities have traditionally lived in multi-generational households, staff noted that this is changing, with more older people in those communities living alone. Offering Homeshare across different communities will require information to be available in relevant languages.

Staff commented that the Auckland service has few Pacific and Māori clients, and furthermore those communities tend to have strong family support networks. As a consequence there has been little promotion of the programme specifically for those communities.

Two interviewees in another programme, run by Virtual Eastern Bays Villages, noted that Homeshare has been developed within non-Māori contexts, conceptual and operating frameworks and is not necessarily something that older Māori would consider, since they usually prefer whānau to support them. However, it was considered that such a programme could have benefits for kaumātua, kuia and their whānau. They commented that for the programme to work in different cultural contexts, such as for Māori, it would need to ensure that the needs of those cultures were met.

6. Challenges and meeting them

This section summarises the challenges in setting up and delivering the Age Concern Auckland Homeshare pilot. Where relevant this discussion includes observations made by HANZA representatives, who have considerable knowledge of Homeshare programmes internationally. This section also includes the perspectives of those setting up and operating the three other NZ Homeshare programmes.

Specific challenges in operating Homeshare relate to policy and procedures, promotion and marketing, staff capacity and capability, programme expenditure, time spent on programme activities, recruitment and matching, managing exit from a homesharing arrangement, programme monitoring and reporting, and funding sustainability.

Policy and procedures

Age Concern note that the HANZA programme manuals and procedures have been essential in establishing the programme, however additional, unanticipated design work was needed to adapt documentation to the NZ context. Staff found both gaps and duplication in the procedures and forms. Consequently, the time from April-December 2023 was devoted to amending, testing and ensuring policies and procedures were working.

A gap was identified in the assessment questions, which did not capture all the information needed. Some of the questions were only asked of householders but should also be asked of sharers. Now the assessment questions for householders and sharers are similar. Another example was the sharing agreement. Although this has been based on HANZA's model, specific terms and conditions for householder and sharer have been added, with the input of legal advice. A third example was the need to design a vetting procedure specifically for international students, depending on their time living in NZ (as noted above).

Staff found that the various HANZA templates duplicated questions. They received feedback from prospective homeshare participants that the forms and questions were repetitive. In response staff have worked on eliminating duplication and streamlining processes.

Several issues raised by older householders have had to be addressed in policies and procedures. These include:

- Impacts of the boarder contribution on senior's living alone allowance. Staff reported that this is one of the most common questions asked by seniors. After work on this issue, Age Concern have set the amount of the sharer's contribution to include recompense for any impact on the allowance.
- Impacts of having a boarder on senior's eligibility for home-based care and hours entitlement. At the time of writing, Age Concern is in discussions with the three NASC (needs assessment and coordination) services across Auckland, to understand how the programme can work alongside those services. It is understood that a householder with existing supports will not have those impacted by participation in Homeshare.
- Insurance requirements for sharer and householder.

A further issue encountered by staff was that the term 'homeowner' does not capture the situation of an older person living in a home owned by a family trust, or in a property owned by a family member. In those cases the permission of the property owner is required to establish a homeshare arrangement.

Interviewees involved in other NZ homeshare programmes commented on the importance of robust and comprehensive policies and operating procedures to manage potential risks. They noted the need for clarification of how the Living Alone allowance and Disability allowance may impact on the financial situation of the householder, as well as insurance matters. Those programmes also identified risks requiring management around:

- Potential for abuse or exploitation of either the older person or the sharer. These risks are currently managed by Age Concern Auckland through the police and references checks, and a thorough and robust interview process. However, it is noted that character references are only required of sharers. It may assist with risk management to also require references from householders.
- The impact of the older householder's family and family dynamics on the operation of the homeshare arrangement.

Promotion and marketing

Lack of public awareness and knowledge of Homeshare has hampered Age Concern's ability to recruit people into the programme. Staff identify low programme visibility and low awareness as a major challenge.

HANZA notes that a strong focus in the establishment phase on providing information through community channels about Homeshare is needed to generate understanding of the programme's value and benefits, how the programme works, and allaying concerns about seniors' safety. The other NZ homeshare programmes found that considerable time needed to be spent on intensively socialising the homeshare concept before attempting recruitment. Those programmes encountered misunderstandings and differing expectations among prospective sharers, householders, families and community service providers. Regarding the latter, it was found that due to misunderstandings about Homeshare's purpose, some community organisations referred unsuitable people to the programmes, e.g., older people with high care needs and younger people urgently in need of housing.

In response to promotion and marketing challenges, Age Concern have refined their activities to increase engagement with the programme:

- Different marketing strategies have been developed to reach older householders and sharers. Age Concern already had communication channels with older people through their existing programmes. However, new marketing channels needed to be created beyond their membership and clients to reach different communities of older people. Those have included promoting the programme through other service for seniors, local community newspapers and other local media, Facebook and a 'pop up' presence. The latter has included stalls at senior expos, which have been useful as people have asked a lot of questions. Currently, Age Concern is discussing having stands in local libraries.
- Reaching sharers has required new channels to be developed, including through tertiary education providers, local shopping centres/supermarkets, and social media platforms used by younger people such as Instagram.
- Most of the seniors Age Concern deals with are aged 80 and over, and many are not familiar with information technology. This lack of connectivity has implications for not only promoting Homeshare to seniors but also communicating with them during programme delivery. Staff note that online marketing needs to be carefully targeted to be effective for seniors and does not reach all older people.

- Auckland’s geographical spread and its diverse communities affects how and where to promote Homeshare. Marketing has evolved to focus on specific geographical or social communities, and used local communications channels such as community newspapers, place-based facilities (e.g., libraries) and meetings with groups.
- Simply using untargeted advertising for sharers has not been effective. One of the other NZ programmes was inundated with hundreds of enquires from people needing accommodation, prompting a move to seeking householders first, and then finding matches for individuals, according to their location, circumstances, need, and personal characteristics. Another homeshare provider used tailored advertising to find sharers for householders. Age Concern has started to run advertisements seeking sharers specifically for an older householder and tailoring the advertisement to their needs. Advertisements have been run through community channels such as the local supermarket.
- Advertising needs to be tailored to the different circumstances and experiences within the pool of sharers. For example, younger sharers may have different awareness, understanding and expectations of sharing with an older person and their needs, compared to an older sharer with a range of life experiences. One example was given of a householder, who commented after the first meeting with a prospective sharer, that she felt she would be looking after the sharer, rather than receiving support from them.

Successful promotions methods

- Community newspaper advertisements
- NZ Listener article
- Google advertisements directing people to the Age Concern Homeshare web page
- Tailored advertisements seeking a sharer for a householder
- Targeted social media promotions
- ‘Pop up’ opportunities

As the Auckland pilot and the three other NZ homeshare programmes have found, families seek information about the programme, and often have contact with the programme before their elder. Families can be instrumental in encouraging their elder to consider the programme. Targeting information about Homeshare to families could increase socialisation of the Homeshare concept and eventual recruitment.

Staff capacity and capability

Age Concern Auckland has struggled to maintain the level of staffing resources needed for the programme. Initial estimates were that there needed to be two full time positions to run the programme to ensure sufficient capacity to manage the programme when people are on leave or sick. In May 2024 it was confirmed that this estimate was still appropriate. The pilot was funded for 1.5 FTEs although this staffing level has not been achieved.

Age Concern Auckland and the other homeshare programmes reported that time needing to be spent on the programme fluctuates and has to be responsive to prospective participants. For example, not all contact with prospective participants can be done in in business hours. Often sharers who are studying or working can only meet in evenings or weekends. Communications with family members also take time and cannot always happen in business hours.

Age Concern staff and HANZA emphasised that a range of skills are needed to run the programme. HANZA noted that the required skills may not be available in the host organisation and suitable staff will need to be recruited. Staff also need to receive training specific to the programme.

Time spent on Homeshare

The amount of time needed to operate the programme varies because there are cycles of activity, combining periods of intense activity with less busy times. Considerable time is required for marketing and promotional activities, assessments, matching, interviews and introductions. The three other NZ homeshare programmes confirmed the ebb and flow of activities and suggested that the programme's business model should reflect the varying time commitments and resources needed.

Time recording is important to identify the range of tasks required for implementing and operating the programme and estimating the time resources needed. Age Concern staff noted that the length of time needed for programme establishment and delivery has been under-estimated. Areas where time and associated costs have been under-estimated are:

- Developing NZ-relevant policy, procedures and forms, including obtaining advice on specific policy and operational matters.
- Staff training.
- Time taken to do interviews. This is both actual time (typically around 1.5-2 hours) and elapsed time (e.g., it can take several days to complete an interview).
- Marketing and recruitment of sharers.
- The matching process is person-centred and individualised to the householder's and sharer's preferences, interests and support needs. Matches may involve several meetings, including with family members, and take months to achieve.
- Establishing a complaints procedure and a problem-solving pathway to help the participants deal with any issues.

Recruitment and matching

Age Concern has found that recruitment has taken longer than expected, both for sharers and householders. A key issue has been to ensure that people receive information about the programme so that they understand what the programme is about. Age Concern and other NZ homeshare programmes observed that the expectations of householders and sharers must be managed.

HANZA and other homeshare programmes emphasized that Homeshare is not a solution to homelessness. Nevertheless, sharers are often in unsatisfactory housing and actively seeking accommodation, therefore their focus is on meeting their own housing needs and they wish to move in as soon as possible. Age Concern Auckland has found that sharers' preferred locations often do not match with the locations of householders and their expectations regarding the standard and use of housing space and amenities can be greater than the householder can or is willing to supply.

Age Concern staff have also found that sharers tend to focus on the benefits to them of sharing, and it is not until the introduction stage that they become aware of the implications of sharing, which will involve formalised sharing arrangements including rules. Staff have found that householders are also concerned about the implications of sharing. Increased energy consumption due to sharing is one of the most commonly raised issues by householders. Again, that issue emerges at the introduction stage when participants talk about the practicalities of a sharing arrangement.

Other NZ homeshare programmes have found that the householder may expect or need a higher level of care and support than the programme provides. They may also expect a higher level of board payment than is appropriate for the programme, and which does not match with the sharer's expectations or ability to pay. Such expectations can cause a homeshare match to be difficult to establish, or to end once established. Other homeshare programmes have also found that many seniors are not used to sharing with non-family, and consequently can struggle with sharing facilities in the home. Interviewees cited a few instances where a share could not proceed beyond the trial period because the householder did not like living with another person in the house.

Other homeshare programmes reported a sense of urgency to make a match, not only on the part of sharers and householders, but also among family members concerned about their elder's care needs.

Top concerns

Householders:

- Safety
- Sharing
- House rules

Sharers:

- House rules
- Exit

Ensuring that appropriate matches are made takes time. Matches cannot be rushed simply to meet a target. Age Concern, HANZA and the other homeshare programmes emphasised the need to grow the pool of sharers to enable suitable matches to be made. If the pool is too small it is very difficult to find a compatible match for a householder. Age Concern has increased focus on recruiting sharers in 2024, in particular through using advertisements targeted to finding suitable sharers for individual householders.

Managing exit from the homeshare

There are risks around terminations for both the sharer and householders. The risk for the sharer is that they suddenly lose accommodation. To manage that risk, Age Concern is discussing whether to set up an emergency fund to help the sharer if they are without accommodation. Further work is needed on assessing whether such a fund is needed, and if so, details of operating a fund, including eligibility requirements and circumstances in which it would be used. Currently, the sharer is encouraged to retain their existing accommodation through the trial period. Age Concern does not proceed with the sharer if they do not have a back-up plan for accommodation. This is a similar approach to another NZ homeshare programme, which opted not to not start a homeshare trial if the sharer had no back-up plan for alternative accommodation.

Programme monitoring and reporting

Because the Homeshare programme is new, Age Concern had no existing data collection or storage platform specifically for the programme. Although data collection instrumentation was provided by HANZA, some of that documentation required development and customisation to a NZ-specific and Auckland-specific context to meet the needs of Age Concern as the local programme provider. As part of the evaluation we reviewed the reporting requirements set out in the contract between Office for Seniors and Age Concern Auckland. This involved identification of potential gaps in data collection and providing advice to Age Concern on requirements of the data variables to be included as well as an appropriate database to store this information. The review highlighted some gaps and areas for improvement, for example:

- Several variables in the HANZA data collection/reporting framework, while potentially valuable sources of information, are not collected by other homeshare providers internationally (or only partially collected) as providers have found them complicated or onerous to collect. Those challenging areas are: time and costs of programme elements; and information for the Personal Wellbeing Index (PWI).

- The reporting tables (Tables A-C) set out in the contract between Office for Seniors and Age Concern Auckland were not deliverable in their original format.
- Some HANZA documentation supplied to Age Concern to facilitate programme delivery, although presented as operational, is generic and more an indicative guideline than a template. Additional steps are required to operationalise processes, for instance where there is a lack of practical examples of how data for certain variables is collected and/or presented in other programmes.
- Where and how collection of data about Homeshare could align with and complement Age Concern's existing data collection processes was identified.
- It was recommended that data is collected through spreadsheets to make reporting more efficient.

Further detail on data collection and reporting issues, and recommendations is presented in "Homeshare Programme: Data Collection and Reporting", 2 October 2023.

Staff report that tailoring Homeshare data collection processes to Age Concern's needs has helped by specifying exactly types of data to be collected, and providing a platform where all data can be recorded in one place. This makes information searching and retrieval easier. The Homeshare lead has refined time recording processes to improve knowledge of time taken in specific tasks.

Funding

Age Concern report that funding to operate the programme has been sufficient. The biggest expense is for staff, followed by marketing, both of which were included in funding. There have been unexpected costs, such as legal costs related to tailoring the Homeshare agreement to the NZ programme's requirements. There may be future expenditure on the translation of communications and marketing materials for different ethnic groups, as well as translation of the sharing agreement.

The main concern that Age Concern has is continuity of programme funding. This issue was also raised by HANZA, which noted that persistent funding insecurity is a problem for Homeshare programmes. In their experience, successful homesharing matches take a long time to establish, and as a result, programmes need establishment funding for three years to become fully operational. Interviewees in the other NZ homeshare programmes commented that the investment needed in programme planning and implementation was greater than initially envisaged. Although funding was obtained to establish those programmes, on-going financial support appears to have been more difficult to achieve.

Potential funding sources for a homeshare programme include public funding (from central or local government), philanthropic funding, sponsorships or client contributions. Often the purpose, objectives and groups served by homeshare programmes do not directly align with public and philanthropic funding frameworks. Moreover, lack of public familiarity with such programmes can inhibit access to funding.

The charging of participant fees for matching and no-going services varies among homeshare programmes internationally and is a debated policy. Reliance on funding contributions from householders' and sharers' payments appears to work in some contexts, but is not always a solution, as it risks pricing the service beyond many participants' ability to pay. Age Concern's programme is currently free, but that may be reviewed. Two of the other homeshare programmes interviewed have debated whether the householder and/or sharer should be charged a fee, but they either did not implement or discontinued charging a fee. This was due to concern that any fee charged would need to be justified in terms of the service provided for the payment.

Housing market factors

Demand for Homeshare can be generated simply because people are in housing need, due to unaffordable housing, or otherwise unsuitable housing. This has been noted especially in the case of prospective sharers desperate for housing, which was found not only in Auckland but also in the other homeshare providers' areas. Those providers noted that housing market conditions impacted on the operation of their programmes by attracting applicants who were not suitable as sharers, as they were focused only on their housing need (not the reciprocal relationship and support), and impatient to acquire accommodation.

Other homeshare providers found some householders were primarily motivated to consider Homeshare because they struggle to afford their housing costs and saw the programme as a way of increasing their income. Those providers also commented on the unsuitability of some houses offered by householders, including: the lack of a separate bathroom/toilet for the sharer, insufficient space for residents to be private, or a dwelling in poor condition and needing repairs.

7. Critical factors in a successful and sustainable Homeshare programme

Certain factors must be present to enable a programme to be successful; without those, the programme cannot achieve its desired outcomes. The broad array of critical success factors range from inputs such as budget and staffing, to specific activities and processes, to organisational culture, strategy and philosophy. External factors beyond the organisation's control, such as policy and funding frameworks and housing market conditions, are also critical to programme success. There are multiple success factors; no individual factor alone is responsible for success or failure.

This evaluation suggests the critical factors for a successful Homeshare programme are:

- A sustained funding stream. Operating the programme is very time and resource intensive in the establishment, implementation and recruitment/matching stages. Sufficient and reliable funding is needed.
- A clearly defined and articulated programme philosophy, strategy and goals.
- Robust policy and operational guidance and manuals tailored to the specific characteristics and needs of the communities served.
- Risk identification and management strategies. Areas specifically identified in the evaluation are: householders' and sharers' expectations; family expectations and dynamics; abuse or exploitation of participants; and managing exit from a homesharing arrangement.
- Organisational leadership and commitment at all levels from board, CEO, managers, and staff.

- Appropriate staffing levels and skill mix for the service provided and communities served. Appropriate staff training and support are critically important.
- Community-based marketing and promotion campaigns targeted to householders and sharers. Socialisation of the homeshare concept in the community is essential as there is low public awareness and understanding of the programme.
- Robust programme monitoring and reporting processes that both meet contractual reporting needs and align with the organisation's existing data collection and monitoring processes.

Staff say these factors are essential

- A full-time dedicated staff position, with support
- Promotions and marketing tailored to householders and sharers and focused on 'hotspots'
- A strong understanding of the geographical and social communities served

'Stand-alone' or within an organisation?

Internationally, homeshare programmes either operate within a host organisation, or as a stand-alone entity. There is no one 'right' model. Operating Homeshare within a larger organisation can be beneficial. Staff interviewed for this evaluation considered that there are operational advantages of running the programme within Age Concern. For example, staff from other Age Concern services can support Homeshare, the website and other communications resources can be used to promote Homeshare, and organisational infrastructure and processes such as administration, police checks, complaints procedure and health and safety policies can be used by Homeshare.

HANZA representatives confirmed that in their experience, homeshare programmes work best in an organisation with operating goals and values compatible with Homeshare's values, such as home-based care providers or community services, with goals of supporting older people to age in place. They note that some programmes start as 'standalone' but became part of an existing organisation to benefit from organisational infrastructure.

Other homeshare providers that were interviewed for this evaluation differed in their perspectives, seeing both advantages and disadvantages of a stand-alone or hosted model. While noting benefits of being part of a larger organisation, they also commented that an advantage of a stand-alone model is its dedicated focus of staff and resources on homeshare, without the risk of those being diverted if organisational priorities change.

8. Conclusions and insights

This formative evaluation of the Age Concern Auckland's Homeshare programme has focused on two areas: the programme's key activities, processes and characteristics; and programme features critical for programme sustainability and transferability.

The programme has been generally implemented as planned although it has varied in some ways from how it was intended to operate as set out in policies and manuals provided by HANZA. Changes have been made to improve processes. This has been prompted by feedback from prospective Homeshare participants, and to better meet the needs of the communities in which the programme operates.

Although HANZA provided data collection instrumentation, changes needed to be made to the instrumentation and to Age Concern's data collection and monitoring processes to align with the programme's information and reporting needs. Some of that documentation has required adaptation to the NZ context.

Age Concern and the three other NZ homeshare providers emphasised the need for robust and comprehensive policies and operating procedures to manage potential risks. To manage risks, Age Concern made changes to policies and operational procedures. Changes have included: lowering the age of sharer eligibility to 21; adapting the vetting process for international students; adapting forms to ensure essential information is collected and to reduce duplication; setting up data collection and recording processes; and adding terms and conditions to the sharing agreement.

Other issues that have needed addressing are: the impacts of the sharer's contribution on the older householder's Living Alone allowance and Disability allowance; insurance implications for both the householder and sharer; and the implications of tenure for those householders living in a home not owned by them. Issues and risks have also been identified around managing exit from a homesharing arrangement.

Operating the programme is very time and resource intensive in the establishment, implementation and recruitment/matching stages. Age Concern found that devoting enough time to ensure programme activities were done well was a major challenge, especially since the organisation struggled to maintain adequate staff capacity for the programme. Age Concern and the three other NZ homeshare providers have highlighted the time required for promotion and marketing to socialise the Homeshare concept, as well as the need to use different methods to reach householders and sharers. The considerable time needed, not only for marketing and promotional activities, but also for making changes to HANZA documentation, assessments, matching, interviews and introductions, was not anticipated by Age Concern.

The large geographical area with its diverse communities has also generated challenges for the programme, as noted in the strong preferences of sharers for locations in which they already live or have connections, and difficulties of matching householders with a limited pool of sharers.

Despite challenges, aspects of the programme are working well. The testing and refining of programme elements through implementation and delivery is an example of what has worked well. Promotional and marketing activities have changed over time to focus more on community-based advertising, expanding channels to reach sharers, and tailoring advertisements to find sharers for individual householders. Age Concern has found that extending the range of approaches to generate enquires has been effective.

Another successful aspect is the training and on-going support provided by HANZA, which was acknowledged by Age Concern staff as critical to increasing their understanding of the programme and their ability to implement it.

Homeshare's location within the larger entity of Age Concern Auckland has enabled the programme to benefit in the establishment and implementation stages from the organisational infrastructure, and the support, skills and networks of other teams.

Although a successful match has not been made, a pool of prospective participants is growing. Considerable efforts have been made to respond to enquiries and complete assessments to increase the pool. The way that Age Concern works with householders was praised by the older householder interviewed for this evaluation, who gave positive feedback about information and support provided.

Overall, while improvements can be made to programme policy and operational processes, there are fundamental challenges to address if Homeshare's sustainability is to be assured. Two key challenges are the programme's low profile and need for an on-going funding stream. Homeshare lacks visibility in NZ, since there is very little awareness and knowledge of the programme. Homeshare is not simply another housing option, nor a solution to housing need. Although it includes elements of care, support and companionship for both householder and sharer, Homeshare is not a substitute for home-based care or other services.

Age Concern and the other NZ homeshare providers have identified householders', sharers' and families' interests in Homeshare and note its benefits, not only for ageing in place but that it also has intergenerational benefits. Nevertheless, in many respects, Homeshare is a niche programme. It is a 'bespoke' model that works best when tailored to and matching the needs of older individuals and sharers. Because of its bespoke character and cross-sectoral benefits, Homeshare cannot be easily accommodated in existing policy and funding frameworks. The challenges of increasing awareness of and support for the programme, as well as improving funding sustainability cannot be solely addressed by programme providers. Those are matters for public policy.

Recommendations for programme sustainability and transferability

If Homeshare is established as a programme, the implementation of a cross-sectoral, support infrastructure should be considered. It is recommended that the agency that commissions and funds a future Homeshare programme:

- Works on establishing funding pathway options for Homeshare.
- Ensures that funding includes provision for the range of resources required for programme establishment and implementation, including staffing needs, training and support.
- Develops and promulgates standardised policy and operational guidance, tools, templates and manuals tailored to the NZ context and responsive to the specific characteristics and needs of the communities served. Guidance needs to address gaps identified in this evaluation, such as:
    - Specification of how to manage issues concerning older householders' eligibility for various government income support payments.
    - Procedures for risk identification and management. Areas specifically identified as needing risk management strategies are: householders' and sharers' expectations; family expectations and dynamics; abuse or exploitation of participants (both households and sharers); and managing exit from a homesharing arrangement. Risk management strategies should clearly set out risk likelihood and implications, the extent and limit of Age Concern's responsibilities, as well as risk management procedures.
    - Time recording templates to identify the range of tasks required for implementing and operating the programme and recording the time needed.
    - Robust programme monitoring and reporting processes and templates that both meet contractual reporting needs and can be aligned with the provider's existing data collection and monitoring processes.

    - Recording and promulgating good practice and real examples of ‘what works’.

Homeshare programme providers have a critical role and responsibility to ensure the sustainability of their programme. It is recommended that programme providers:

- Ensure that there is a clearly defined and articulated programme philosophy, strategy and goals for Homeshare, that includes strong alignment with local needs and community demographics, including cultural diversity.
- Clearly define the geographical area and/or community that the programme will cover and use this as a test-bed for implementation and achieving matches before expanding the programme.
- Ensure there is a programme coordinator/lead, preferably as a fulltime position. Establish and maintain required staffing levels and skill mix for the service provided and communities served.
- Ensure appropriate staff training and support are provided. There may need to be professional development for specific programme activities such as matching, or sudden events, such as crisis management or conflict resolution.
- Develop community-based marketing and promotion campaigns targeted in ways to best reach the different audiences of householders and sharers. This is firstly to socialise the homeshare concept in the community and secondly to facilitate appropriate matches.
- Provide information to local agencies, organisations and services about Homeshare to increase their understanding, awareness and support for the programme, and ensure appropriate referrals.
- Consider how local organisations could be active supporters of Homeshare through partnering to provide resources and expertise.
- Engage with families of older people to raise their awareness of the programme, and manage expectations or risks.

Appendix 1: Topics for discussion with Age Concern staff

Planning and implementation

What goals or objectives does Age Concern Auckland have for the Homeshare programme?

How did you determine that this programme is needed? What specific considerations were there of householders' needs and homesharers' needs?

What important factors did you take into account in planning the programme?

What is the geographic area covered by the programme, and why was this area chosen? Are there any specific characteristics of this area that have influenced the programme's approach and characteristics?

How have you considered and included cultural perspectives in the programme?

What are the resources needed to deliver the programme:

- Staff resources: How many staff are dedicated to this programme (full or part-time)? What skills are needed? What are their roles? Have roles been specially created, or existing roles expanded? What training has there been for this programme?
- Funding: has all funding come from the contract or have there been other funding sources (if so, %s). What have been the major budget items? Have there been any unexpected costs, if so how have they been managed?
- What % of costs are start-up costs, as distinct from operating costs?
- Other resources needed?
- What issues did you encounter in planning and implementation, and how did you resolve those?

Is the Homeshare programme separate to other Age Concern activities (stand-alone) or is it delivered as part of other activities?

Have you had to change any initial intentions or programme characteristics to implement the pilot? If so, why was that?

What has been instrumental in getting the programme off the ground?

What have been the barriers and risks that you have dealt with?

(2nd meeting) Looking back, what would you have done differently?

Delivery

How is the Homeshare programme marketed? What channels are used?

Does Age Concern keep a record of inquiries seeking information, advice about homesharing?

To what extent do enquiries from prospective householders and homesharers match with the 'priority group' criteria set out in the contract?

How are householders and homesharers selected? What eligibility criteria have you established for: a) householders; b) homesharers?

What assessment of suitability is done (e.g., pre-screening, reference checking, and police vetting)

How are householders and homesharers ‘matched’? What are the processes for introductions and to assess compatibility? Has AC done any re-matches – what is the process?

What is done to assess whether the dwelling/property is suitable for a boarder, e.g:

- Dwelling meets Healthy Homes standards
- There are suitable amenities for hosting a boarder, including a separate bedroom
- Both parties will have adequate privacy
- The location is suitable

How does Age Concern ensure that householders and homesharers are informed of and understand their rights and responsibilities under the Homeshare programme?

How does Age Concern ensure that householders and homesharers understand that the programme is a pilot, including what will happen after the pilot end date?

What is the Homeshare arrangement agreement and how is this established?

How is the board amount set?

How is the ‘support’ provided by the homesharer agreed, and what is the nature of that support?

Do either the householder or homesharer pay any fees for participating in the Homeshare programme?

How does the one-month trial period work? How do participants decide whether to continue or exit the arrangement?

What is the nature of on-going contact with householders and homesharers? Does Age concern keep a record of contacts with participants? E.g., inquiries seeking information, advice.

How does Age Concern identify risks in homesharing arrangements, and how are these managed?

How are homesharing issues, complaints or conflicts deal with? Does Age Concern keep a record of issues and complaints?

If there have been any exits:

- what are the reasons for those?
- How does AC manage the exit process?

What benefits of homesharing have Age Concern observed from this pilot?

Provider capacity and capability

Do you do any on-going review or troubleshooting during the programme delivery?

What staff skills and experience have been most useful so far?

What skill gaps or training improvements can you suggest?

What resources are needed to sustain the Homeshare programme?

Do you think you will continue with the Homeshare programme? Why / why not?

What can be learned from your experience of running a Homeshare programme?

Appendix 2: HANZ

What are the challenges in setting up a Homeshare programme?

What are the most important factors to consider when setting up?

What are the challenges in running the programme?

In the evaluations that HANZA has done, what are the main things that have been learned about what makes a successful and sustainable Homeshare programme?

- Are there particular approaches and activities that work well?
- What does not work?
- What are the 'pre-conditions' for success?

What would encourage wider take-up of Homeshare?

Appendix 3: Interview topics for prospective householder

Why did you decide to take part in the programme?

How did you find out about the Homeshare programme?

What sort of information did you receive from Age Concern (written, oral). What did you like/not like about the information? Did it help you?

Did you talk about Homeshare with anyone else, or seek information about homesharing from anywhere else (e.g., friends, family, organisation, internet)?

What were your initial expectations of the programme?

What did you think about the application and assessment process (the information you needed to provide, references, vetting etc)?

What did you think about the matching process? Did you have to wait a while for an introduction? How many prospective homesharers did you meet?

Did you have to make any changes to your home to be considered for the programme? How did you manage that?

What sort of practical support or help from the homesharer would you like?

What do you think would be the benefits of sharing your home?

Appendix 4: Other Homeshare Programmes in New Zealand

We interviewed people involved in three homeshare programmes in different locations about their experiences of operating their programme, including establishment, funding, staffing, promotion and operation.

The programmes are: two programmes that operated for a period and then ceased, Let's Share Hawkes Bay (LS) and Virtual Eastern Bay Villages Homeshare (VH); and Homeshare for Her Nelson (HH), in the implementation stage.

Interviews were conducted with a community worker employed by Age Concern Hawkes Bay for LS, a trustee of HH and five people involved in VH, including one sharer. Interviews focused on the following topics:

- Why the programme was established
- How the programme was set up and run
- Programme outcomes
- Issues encountered
- The factors considered to be important for successful programme operation.

Description of the programmes

A summary of each programme's characteristics is presented in Table 2. A brief description of each programmes follows.

Table 2: Programme Characteristics

	LS	VH	HH
Area covered	Hastings, Napier	Whakatane District	Nelson, Tasman
Duration of programme	Approx. 18 months	Approx. 4 years	In development for over 3 years, re-launch in September 2023
Number of Homeshares	4 homeshares 6-7 trials	4 homeshares	No matches yet
Within organisation or stand alone	Within	Within	Stand-alone
Staffing	Part-time coordinator	Part-time coordinator with other roles	Two: part-time coordinator and communications
Sharing agreement	Yes, similar to a boarding agreement	Yes	Two boarding agreements to suit different situations
Help	10 hours per week	10 hours per week	To be decided by participants
Fees	Initial intention that sharers would pay a weekly fee, but this not implemented	Initially charged a one-off fee to the homeowner and a monthly fee to the sharer. Discontinued after concerns about risk	Not charging at present, may charge owner in future
Board payment	Intention that sharers would not pay board, but some sharers did	Negotiated between homeowner and sharer	Negotiated between homeowner and sharer
Trial period	2 weeks	Not stated	Yes
Contact with participants	Weekly for the first few weeks, then occasionally	As needed	As needed

Let’s Share (LS)

LS, run by Age Concern (AC), started in Hawkes Bay in early 2020 just before the Covid-19 lockdown. A match was in progress before lockdown. The two parties decided very quickly to set up the share to avoid any uncertainty due to lockdown.

LS emerged out of a pilot homeshare programme run by Presbyterian Support Services (PSS) in Hawkes Bay. The pilot ended when funding ran out. With the permission of PSS, AC set up a similar programme, using PSS’s documentation including interview forms, checking processes, sharing agreement, policies, and operating procedures. AC was asked by PSS not to use the name Homeshare. Consequently, AC named the programme Let’s Share. The interviewee reflected that the name ‘Let’s Share’ may not have been sufficiently descriptive of the programme, which may have led to confusion about the programme’s purpose.

There were two successful long-term matches over the 18-month period of operation. The first homeshare lasted for a year until the homeowner needed more care, which was unreasonable for the sharer to provide. In the second homeshare a sharer (aged 70s) was matched with a homeowner in his 90s. That homeshare continued for over 18 months until the death of the homeowner.

Two other homeshares lasted for shorter periods of time but broke down when the homeowners wanted more help than the sharers were able to provide. Over the programme’s operation, there were 6-7 trials. In one instance, two different sharers were tried with the homeowner but it was apparent that the homeowner had a high level of care needs which were unsuited to the programme.

Virtual Eastern Bays Homeshare (VH)

VH, which started in 2018, was established as a trial initiative under the mantle of Virtual Eastern Bays Villages (VEBV) in Whakatane District. VH was developed as part of the development of VEBV, a ‘virtual retirement village’ model helping people to age in place by providing information, advocacy and support to older residents. VH operates with the same principles as VEVB, a two-tikanga governance model and a community development approach.

VH emerged out of research conducted by one of the VEBV trustees about potential models that VEBV could operate, including a homeshare programme in London, where mainly young people were living with older homeowners.

During its operation VH achieved four sharing arrangements. Three ended because the older person passed or went into residential care. One ended because of inappropriate behaviour by the homeowner.

Homeshare for Her (HH)

HH grew out of community consultations that Community Action Nelson (CAN) conducted about housing issues, and through connections with organisations such as the Women’s Centre. Initially, options for women and children in housing need were explored. Through researching options, homeshare-type programmes in Australia and the United States were discovered, prompting the establishment group to set up HH as a homeshare programme specifically for women.

HH set up an advisory group to help develop the programme and has followed a community development approach. Through running sessions about the programme, the HH organizers found some women who were already sharing their home for companionship and to help with costs. This was a helpful source of information about how to operate a homeshare programme.

In the early stages, some matches were made but these did not result in homesharing. The interviewee noted that progress has not been as fast as they had hoped. Now, there is no rush to establish matches, but rather efforts are devoted to socialising the programme locally. Between November 2023 and February 2024, the HH website had 16 registrations from homeowners and 12 from sharers.

Reasons for programme establishment

Interviewees from all three programmes commented on the high need for secure, affordable housing for seniors in their areas.

LS was established because of the severe housing pressures in Hawkes Bay. Market rentals are unaffordable for seniors and housing specifically targeted to seniors is in short supply. Council housing has a long waiting list and there is no Abbeyfield or other affordable housing specifically servicing seniors. At the time of the interview, the interviewee, the former LS coordinator, was helping three seniors to find housing.

VH interviewees identified a clear local need for a homeshare programme. Even though VH is on hold, VEBV continue to receive enquiries about homesharing, particularly from older people needing support to stay in their own homes, and families (living both within and outside of the area) with older relatives needing support.

The HH interviewee identified high housing needs among single women, and women and children. Through discussion with local housing providers and Age Concern, HH refined the group they wished to service to focus on older women homeowners in larger homes struggling with managing their property. Potential sharers were envisaged to be older women struggling to afford rentals on their own and single working women.

Programme benefits were identified. Benefits for homeowners include companionship, practical support to help them stay in their home, and perhaps a modest financial benefit that contributes to running their home. Benefits for sharers include an affordable housing option and companionship. Families also benefit, as homeshare gives them peace of mind about the wellbeing of their older relative.

Governance and operation

LS and VH operated under the auspices of another organisation, which provided governance and organisational infrastructure. This enabled the homeshare programme to use existing policies and procedures required to operate the programme, such as police checks, health and safety procedures, communications staff and resources, administration, reception and support from other staff. The programmes were able to draw on their host organisations' extensive networks for homeshare publicity and promotion, as well as linking older clients with other services they might need.

If VH re-activates its homeshare programme, it may be established as a stand-alone trust, as VEBV has done with the transport service it set up. Interviewees noted the advantages of operating VH under the larger organisation, such as access to operational resources, networks and volunteers. However, having no staff fully dedicated to running VH was seen as a disadvantage. The question was also asked, about whether homeshare would receive sufficient attention as one of several activities within a larger organisation.

HH was initially set up under the umbrella of CAN, then became a separate legal entity, a charitable trust. The interviewee noted that this was “complex” due to having to establish the trust structure and transfer funding over to the new entity, which took time and money. The interviewee concluded “I would not recommend being a separate entity.”

Staffing and expertise

Generally, staff involved in the homeshare programmes work part-time on homeshare. While LS and HH coordinators only deal with homeshare, the VH coordinators had other roles as well as homeshare.

The LS interviewee observed that staff hours needed to be flexible, due to the wide geographical area covered by the programme, and the need to meet relatives of the owner, as well as prospective sharers, at times convenient to them, such as outside of work hours in the evenings or weekends.

All three programmes were found to be very time intensive. Interviewees said the time needed to operate the programme is often under-estimated. Sufficient time was needed for police checks, character checks, references, interviews and so on. Many tasks had to be done in the correct sequence, and therefore time elapsed while one task was completed before the successive task could be started. Often time had to be spent managing expectations of all parties; the homeowner, sharer, and the homeowner’s family.

As well as paid staff supporting the programmes, all programmes rely to some extent on volunteers and paid professional input. Interviewees commented on additional expertise required, in particular legal advice for ensuring appropriate sharing agreements, and advice about the implications of sharing a home for the Living Alone allowance and disability allowance payments.

Funding

Funding grants for establishing the programmes were obtained from various sources including councils, philanthropic trusts, Lotteries and the Ministry for Women.

LS and HH sought funding for setting up and running their homeshare programmes. Such funding covered the coordinator’s wages as well as some promotion, website, administration and operating costs.

VH was set up within VEBV. Expenditure on staff time, the largest operating cost, came out of funding for VEBV, which had funding for a coordinator. Expenditure on promotion was reported as minor, mainly consisting of the coordinator’s time spent in talking to groups.

Programme promotion

To promote the programmes, all three organisations used their community networks, local radio and print media, and social media. Activities included:

- Speaking to local organisations, including Grey Power, Council, GPs, health centres, hospital, U3A, Probus, Rotary.
- Flyers and brochures.
- Social media such as Facebook and Instagram.
- Advertising sharing opportunities on Trade Me.
- Establishing a dedicated website for promoting the programme and linking up prospective homeowners and sharers (HH).
- Using the host organisation’s website (LS and VH).

- Attendance at special events, such as Seniors Expo.

Promotions were refined over time. For example, after initial publicity, LS was inundated with hundreds of enquires from people needing accommodation, which was difficult to manage. LS then moved to seeking homeowners first, and then finding matches for them, according to location, circumstances, need, and personal characteristics.

VH used VEBV's extensive networks and connections with local service providers, as well as local media to promote the programme. Trade Me was used for tailored advertising seeking sharers for individual homeowners.

Initially HH ran information sessions to gauge interest. After funding was gained, HH set up a website aimed at helping home seekers and owners to contact one another, akin to a dating website. HH has entered a new phase of socializing the concept of homeshare with a relaunch of the website in September 2023, a new coordinator and a communications person. There has been a strong focus on educating the community about the idea of homesharing, emphasizing that the programme is primarily about relationships and a safe and secure home. HH has taken a "soft promotion" approach, focusing on growing slowly so as not to over-stretch existing resources.

Interest in the programme

Interviewees reported there was no shortage of interest in the homeshare programmes, from homeowners and potential sharers, and family members of the homeowners.

Homeowners' interests in the programmes vary, from wanting some financial contribution, to companionship, to practical support to help them stay in their home. Potential sharers are interested in accessing affordable, congenial housing. Some are interested more in the physical attributes of the property rather than in the relationship aspects of the concept, such as companionship and help. However, some sharers find the programme appeals to their desire to contribute to the community. Interviewees reported that the sharers who have been in a successful homeshare appear to have an interest in helping others. One current sharer noted that she had health care skills, so she knew she could make a positive contribution to helping a senior to remain in their home.

LS noted that, as well as homeowners offering their home, so too did some older renters, including one tenant in council housing. A wide range of people expressed interest in sharing their homes including middle-aged and older single women, families, and some younger people. Because of this wide interest, LS decided that if one person (either homeowner or sharer) was older person, then the programme could viable. LS received a lot of referrals from agencies on behalf of older people requiring resthome level care, and for people with disabilities requiring a higher level of care than the programme could provide. LS and VH found that both men and women homeowners had a preference for female sharers, possibly because of the association of women with caregiving.

VH received a lot of interest in their programme from families with older parents needing some help and support to enable them to stay living in their home. VH has found that most interest has come from Pākehā families with an older relative needing support, while prospective sharers have been women in their 50s and 60s with few financial resources. VH consider that the age structure of the area, weighted towards seniors, is reflected in the interest in the programme from middle-aged and older sharers. Two people involved in VH noted that homeshare has been developed within a non-Māori context, and is not necessarily something that older Māori would consider, since they usually prefer whānau to look after them. However, there could be benefits for kaumātua, kuia and whānau. One interviewee commented:

> *It's an excellent Kaupapa if that's going to keep the elderly at home. It is a non-Māori framework but there's an opportunity to make sure the framework meets the needs of Māori and others … Whatever culture you're caring for, it's ensuring their needs are met their way … making sure it is culturally appropriate and minimising risks.*

HH has found there is a lot of general interest in the homeshare idea. They have also received suggestions for affordable housing ideas which may not fit with the homeshare programme but have the potential to support women and children looking for housing.

Sustaining and ceasing programmes

The two programmes that are no longer operating put forward different reasons for their programme ceasing.

LS stopped due to the programme funding running out. It is unclear whether they sought additional funding. The former coordinator commented that, although funding was obtained to start the programme, it can be more difficult to win more funding to continue the programme.

VH is on hold until the purpose of the programme is more clearly defined and a comprehensive set of policies and operational procedures are developed. The concern was that over the time of the programme's operation, risks were not fully assessed, nor were policies put in place to manage risk. Moreover, the programme was becoming a service delivery activity potentially requiring more resources, rather than a brokering and matching service for potential homesharers. VEBV is not a service delivery organisation; consequently, there has been a suggestion that if the programme is started again, it should be set up as a standalone trust, like the community transport service that originated in VEBV.

Areas where policy, operational guidance and risk assessment are needed for a new VH homeshare programme include:

- Whether fees to homeowners and sharers should be charged, and for what purpose.
- Whether matches should be provided with follow-up and support after the homeshare is established.
- Whether VH should be responsible for finding another place for the sharer if the homeshare ceases.
- The implications concerning the Living Alone allowance if the sharer is paying board.
- Managing the risk of abusive behaviour, either by the homeowner, sharer, or family member.
- Managing risks around family dynamics which may affect the sharer's safety or security.

From these three examples, it is clear that there are important requirements for sustaining homeshare programmes. The key findings from the interviews are:

- An on-going funding stream is needed. Operating the programme is very time and resource intensive in the start-up and recruitment/matching stages. Interviewees in all three programmes commented that the investment needed in programme planning and implementation was greater than initially envisaged. Although funding was obtained to establish the programmes, on-going financial support may be more difficult to achieve.

- The programme's key activities such as promotion, recruitment, matching and supporting successful homeshares are not on-going activities, but ebb and flow. Due to the 'stop-start' nature of the programme, an appropriate business model is needed to reflect and accommodate this.

- Ensuring the skills needed to operate the programme are available.
- Socialisation of the homeshare concept in the community is essential, so that it is well understood what the programme is and is not about. The programmes encountered misunderstandings and differing expectations among prospective sharers, owners, families and community service providers:
    - Homeowners may expect or need a higher level of care and support than the programme provides. This was found by both LS and VH. Such expectations can cause a homeshare match to be difficult to establish, or to end once established.
    - Homeowners may expect a higher level of board payment than is appropriate for the programme, and which does not match with the sharer's expectations or ability to pay.
    - The expectations of sharers can be unrealistic. Interviewees reported sharers expecting a high standard of housing quality and expecting to share more amenities or spaces than the homeowner is prepared for.
    - Many seniors are not used to sharing with non-family, and consequently can struggle with sharing facilities. Interviewees cited a few instances where a share could not proceed beyond the trial period because the homeowner did not like living with another person in the house.
    - Participants' sense of urgency to make a match was reported. This was especially in the case of family members concerned about their elder's care needs, and due to urgent housing needs experienced by prospective sharers.
    - Some community organisations have referred unsuitable people to the programmes.
- Robust and comprehensive policies and operating procedures are needed to manage potential events and risks. Areas of concern identified in the interviews included:
    - There is potential insecurity for the sharer if the homeshare ceases. LS decided to not start a trial if the sharer had no back up plan of alternative accommodation. VH also noted that stability for the sharers should be a priority.
    - The relationship between the sharer and family.
    - Managing the risk of abuse of the owner or sharer.
    - Whether the owner or the sharer should be charged a fee by the programme provider.
    - Clarification of how the Living Alone allowance and Disability allowance may impact on the financial situation of the homeowner.
    - Some houses offered for sharing are unsuitable. Issues raised by interviewees include: the lack of a separate bathroom/toilet, insufficient space for residents to be private, dwelling in poor condition and needing repairs.

Conclusions

All three homeshare programmes have identified a local need for homeshare, promoted their programmes and garnered interest. Sometimes the level of interest has been far greater than the programme can manage. That interest may reflect serious unmet housing needs in those communities among all age groups, as much as a need for a safe and supportive housing option for seniors. Interest in the programme may also reflect unmet need among seniors for home-based care and support services that they are not receiving.

Despite keen local interest, all organisations noted that socializing the programme so that it is well understood and supported within the community is essential. Clarity around the programme's purpose would help to manage the expectations of homeowners, sharers, family and other services.

To set up a homeshare it is necessary to have appropriate operational policies and guidelines, adequate funding and staff with appropriate skills. While staff and funding have been acquired, it is less apparent how programmes would be sustainable over the long-term without a dedicated and certain funding stream.

All organisations said it would be helpful to have practical operational resources and guidance, such as manuals and advice on issues encountered. As one interviewee said, "A book of how to do it would be great".