bev james
PUBLIC POLICY & RESEARCH LIMITED

Evaluation of the Homeshare Pilot: Stage 2 Final Report

Dr. Bev James, Public Policy and Research

Copyright

This work is licensed under the Creative Commons Attribution 4.0. In essence, you are free to copy, distribute and adapt the work, as long as you attribute the work to the Crown and abide by the other licence terms. To view a copy of this licence, visit https://creativecommons.org/licenses/by/4.0/

Please note that no departmental or governmental emblem, logo or Coat of Arms may be used in any way which infringes any provision of the Flags, Emblems, and Names Protection Act 1981. Attribution to the Crown should be in written form and not by reproduction of any such emblem, logo or Coat of Arms.

Published August 2026

Office for Seniors PO Box 1556 Wellington 6140 New Zealand

Email: ofs@msd.govt.nz

Web: officeforseniors.govt.nz

ISBN: 978-1-991389-48-0

Contents

Tables

Glossary

Homeowner / Householder: both terms are used interchangeably in the report. This is the person offering accommodation through homesharing. Both programmes described in this report acknowledge that it is not only owner-occupiers (homeowners) who may wish to establish a homeshare, but also people in other tenures, such as renting or living in a home owned by a family trust. Both programmes allow for this possibility, as long as the householder is able to use the property they live in for homesharing.

Homesharing: the arrangement where usually an older person (homeowner/householder) provides accommodation in their home to an adult (the sharer) who in return provides some help with household tasks and companionship. The sharer may also pay a modest fee for their accommodation.

Seeker: Homeshare for Her refers to the person looking for accommodation as the ‘seeker’. In effect, this person is a sharer.

Sharer: the person who receives accommodation in return for helping the homeowner/householder.

Executive Summary

This evaluation report presents:

- Stage 2 of the evaluation of the homeshare pilot delivered by Age Concern Auckland (Homeshare Auckland), with a focus on delivery and outcomes.
- A formative evaluation of the Homeshare for Her (HSfH) programme based in Nelson and Tasman.

These involved:

- Analysis of programme documents, administrative data and provider reporting to Office for Seniors.
- Interviews with programme staff, and in the case of HSfH, trustees
- Interviews with programme participants.
- Two rapid literature reviews summarising research findings relevant to the evaluation. The first review concerned homeshare models that have developed internationally, and the second concerned issues impacting on homeshare programme success and sustainability.

The two homeshare programmes are examples of different homeshare models:

- Age Concern Auckland's homeshare programme is an example of the facilitated model. This model provides a range of services including screening of participants, facilitating introductions, help with establishing the homesharing agreement, follow-up check-ins and support, referrals to other service providers if needed, and help with terminating a homeshare.
- Homeshare for Her has the characteristics of the referral model of homeshare. The referral model connects prospective homesharers by enabling those seeking and offering a homeshare to find one another and to achieve a match themselves.

The two programmes are structured differently, serve different groups and are at different stages of operation:

- Homeshare Auckland is based in Age Concern and matches older homeowners with (generally younger) sharers. It has been operating for two years. Since December 2024, the programme ceased active recruitment of homeowners and instead maintains support of the established homeshares.
- HSfH seeks to address women's needs for safe, secure and affordable housing. It is a stand-alone entity operating through a web-based accommodation search platform. Operating since 2022 as a charitable trust, HSfH introduced an improved interactive website in January 2024 and is looking to grow its membership.

Because the programmes differ in both their delivery approach and stages of operation, this has enabled the evaluation to develop insights into the strengths and weaknesses of different models, as well as issues and challenges arising at different stages of operation. The two programmes have contrasting, but also shared experiences of delivering homeshare. This evaluation has focused on those commonalities to understand the implications and potential for operating homeshare programmes in New Zealand.

Evaluation findings: Homeshare Auckland

Age Concern's homeshare programme has been built from scratch and over the two years of operation has continued to make refinements as needed. Staff have developed a strong relationship with programme participants.

The programme's core components are: promotion and advertising, assessment of applicants, facilitating introductions between prospective homesharers, supporting homesharers to establish the sharing agreement, and on-going support after a sharing arrangement starts.

By March 2025, four homeshares had been achieved. Homeowners, sharers and a family member gave positive feedback about the programme.

Participants' perspectives and experiences

Programme participants spoke very highly of the programme and the service provided by Age Concern. The coordinator's role was especially appreciated. Interviewees commented favourably on the care and support they received from Age Concern, including efforts to find a suitable match and follow-up contact and support after the homeshare started.

Homeowners commented that the main benefits of homesharing were the companionship received from the sharer and help around the house. They appreciated the sharer's presence in the home, especially at night. Sharers emphasised the companionship they received from the homeowner, their enjoyment of doing domestic tasks for their older housemate, and savings on housing and living costs.

There were some differences in homeowners' and sharers' perceptions of the success of the homeshare. Overall, sharers seemed to be more satisfied with their homeshare than homeowners. Sharers were very satisfied with the financial advantages of homesharing and liked living with older people. Even though homeowners explained that for the most part they had found homesharing to be a positive experience, they commented on challenges around adjusting to living with someone else. Homeowners noted some tensions with the sharer around food preferences, communications, task expectations and dwelling amenity expectations.

The main areas homeowners and sharers suggested for improvement were:

- Greater identification and specification of elements of the sharing agreement.
- Review of the sharing agreement and ability to make changes agreed by both parties.
- Increased follow-up within the first few months of homeshare.
- Ensuring that the dwelling is suitable for homesharing.

Wellbeing outcomes for homeowners and sharers

Wellbeing outcomes for homeowners and sharers were intended to be measured by Age Concern using the Personal Wellbeing Index (PWI). Assessments were done with participants at the on-boarding stage, and after a homeshare ended. However, the few matches that have been achieved provide insufficient data for analysis.

What is working well

Homeshare Auckland 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 Homeshare Australia and New Zealand Alliance (HANZA). This is because programme elements were tested and refined throughout the first year of implementation and operation. Changes were made to improve operational processes, and to better meet the needs of the communities in which the programme operates. Age Concern has made considerable effort to document and review matches that have been achieved, to learn from what has worked or not worked.

The pool of prospective homeshare participants has grown due to promotional and marketing efforts. These activities have changed over time to focus more intently on community-based advertising, using different marketing strategies to reach older householders and sharers, and tailoring advertisements to find sharers for individual householders.

Homeshare's 'home' within Age Concern Auckland has enabled the programme to benefit from Age Concern's organisational infrastructure, and the support, skills and networks of other teams. The Homeshare team has benefitted from training and on-going support provided by HANZA, which has helped staff increase their understanding of Homeshare and their ability to implement it.

Programme improvement and future intentions

Staff identified four areas where they would like to see programme improvements. However, this was within the context of formal funding from OfS ceasing in June 2025.

Three staff suggestions focus on aspects where Age Concern could make improvements. These cover: growing the matching pool; expanding the programme to different ethnic communities; and assisting sharers when their sharing arrangement ends suddenly.

The fourth suggestion concerns expanding training resources, which would indicate a key role for an external agency. Staff suggested that detailed scenarios of real-life situations could be developed as guidance for addressing participants' questions, and managing risks, issues and sudden events.

Key programme features critical for programme sustainability and transferability

The evaluation found the following programme features are critical for sustainability and transferability:

- The programme provider has legitimacy and trust in the community in which the homeshare programme operates.
- Having the dedicated role of coordinator.
- The range of promotional activities are appropriate to the location and targeted to the different needs of homeowners and sharers.
- Community-based promotions and marketing.
- Processes and procedures are fully recorded.
- Priority is given to growing the matching pool so that there are sufficient numbers of compatible matches to be made.

- Understanding prospective homesharers' preferences, expectations and needs is essential for successful matching and the success of the homeshare.
- The matching process cannot be rushed. It is a personalised process focusing on the characteristics, needs and preferences of each person.
- On-going support to participants is provided after a match is made.
- The homeshare agreement should be reviewed part way through the homeshare.
- Support needs to be provided for both the homeowner and the sharer.
- Training resources are tailored to the homeshare programme's characteristics, groups served and the environment in which it operates.
- The standard of the dwelling and amenities provided to the sharer are appropriate.
- The homeowner's family, if possible, should be involved in supporting the homeshare.
- There is on-going review, learning and application of learning to adapt and improve operational processes as needed.
- There are sufficient funds for programme provision.

Evaluation findings: Homeshare for Her

HSfH has achieved a good-sized matching pool through extensive promotions and marketing that has helped to increase familiarity with the homeshare concept, both within the community they serve and more widely. HSfH has received requests from organisations outside of the region interested in establishing similar programmes.

HSfH has a strong focus on making improvements to website accessibility and functionality so that it meets users' needs. The meet-up events have been a successful addition to the core provision of the website. Members interviewed for the evaluation have commented favourably about the programme.

Participants' perspectives and experiences

Interviewed HSfH members reported that they were attracted to the programme because of its emphasis on supporting women and providing an option to meet women's housing needs. They reported that the website is valued as a way for women to safely offer and seek accommodation. It is seen as offering greater protection than other accommodation advertising websites.

Those interviewed members who have started a homesharing arrangement through HSfH were positive about the programme and identified a key benefit of homesharing as managing housing costs. Householders also identified help with household chores as a benefit, while seekers focused on affordability, housing safety and security, comfortable accommodation, and proximity to work and community amenities. Companionship was a consideration in choosing homesharing, but this was only a priority for some householders and seekers.

Programme characteristics, processes and activities

The main service provided by HSfH is an interactive online platform that helps women seeking accommodation and women offering accommodation to find house mates. On-going refinements are made to improve website functionality. There is coordinator oversight combined with some support, including online information and guidance resources.

HSfH uses a wide range of marketing and promotion methods to increase local awareness and attract members. HSfH also holds regular meet-ups between householders and home seekers. Meet-ups help promote the programme, provide an information sharing forum and enable women to meet potential house mates.

Programme goals and objectives

The goals and objectives of HSfH are concerned with helping women to establish a homesharing arrangement that offers affordable, safe and secure housing. HSfH is also about facilitating companionship, social connection, and mutual support among women through housing.

The programme as delivered is generally meeting these goals and objectives. The number of women registered with the programme by April 2025, around 286 women (200 seekers and 86 householders), suggests the programme is meeting a significant need, particularly for older women and women living alone.

HSfH organisers noted that a programme goal is to enable better and more flexible use of housing stock for householders and seekers. The evaluation provides limited evidence of improved use of housing stock through the accommodation offerings.

Performance measures

The provider contract has two deliverables:
- Deliver the homeshare programme.
- Participate in the evaluation.

With regard to programme delivery, HSfH is required to promote the homeshare concept and the programme and facilitate matches. Overall, these tasks have been met, or largely met. There has been extensive local promotion of HSfH. Organisers have reported increases in registrations after publicity. The meetups appear to be a successful way of bringing together potential house mates and promoting the programme.

Although follow-up and support after a homesharing match is made is not part of HSfH delivery, some support is provided to help members link up with others. The coordinator assesses eligibility, checks profiles and provides help to craft a profile. Support is also provided through the meet-ups.

With regard to participation in the evaluation, this required organisers to meet with the evaluator twice and to facilitate access with members so that participant interviews could be conducted by the evaluator. This deliverable has been exceeded.

Consideration of cultural perspectives

The evaluation identified some focus on cultural perspectives. The programme's intent is to include women of all ages, ethnicities and cultural backgrounds. The information resources include questions that seekers and householders can ask one another, which enable different cultural and ethnic practices and preferences to be discussed.

Programme viability and transferability

The evaluation noted the following factors relevant to programme viability and transferability:

- The matching pool must be sufficiently large to enable compatible matches.
- The programme needs to be tailored to the needs and characteristics of the community.
- It is important to take account of seekers' needs and preferences about the location of accommodation offered, including its nearness to amenities and the seeker's networks.
- The provision of an interactive online platform as the main delivery mechanism has strengths and weaknesses. The web-based approach appears to work well for those served by the programme. However, some problems with website features were identified and the organisers are working to improve the website experience.
- The programme has a diverse range of members, suggesting that advice, information and assistance needs to be tailored for different needs.
- The dwelling must be of a suitable standard for homesharing.
- Security of funding and diversity of funding streams is essential for on-going programme viability.

Programme success and sustainability

This evaluation considers five issues concerning programme success and sustainability that were identified in a rapid review of homeshare literature:

- How success is measured.
- Achieving a sufficiently large matching pool.
- The programme processes and actions that contribute to a successful match.
- Risks identification and management.
- Financial sustainability.

Measuring success

Both programmes use 'numbers in the matching pool' as a measure of success. Both are also concerned to measure the efforts put into programme activities that are important for achieving matches. They take a view of success that is wider than simply the number of matches, and as a consequence consider aspects of participant satisfaction, benefit and wellbeing.

Growing the matching pool

Both programmes are aware of the need to increase the pool of those offering and those seeking a homeshare. They have worked on increasing their profiles in their respective communities and encouraging engagement of householders and prospective sharers with their programmes. This is done through extensive, localised promotions and advertising, and connecting with other community-based organisations.

Achieving a successful match

Many of the programme components identified in the homeshare literature as contributing to a successful match are present in the two homeshare programmes. Both have clearly communicated the principles and aims of homesharing, have a dedicated coordinator, and explicit eligibility criteria. Both programmes have a strong emphasis on encouraging good communication between households and sharers, as well as between the programme staff/organisers and participants.

Both programmes provide various types of vetting, support, and matching processes, although the nature and extent of these differ due to the type of homeshare model they follow. HSfH, as an example of the referral model, has much less emphasis on assessment and matching of participants than does Homeshare Auckland, which follows the facilitated model.

Risk management

Both homeshare programmes have used risk management approaches identified in the homeshare literature, including obtaining legal advice, providing comprehensive information about homesharing to applicants, using eligibility criteria and declining enquiries if necessary. Each programme has identified its own risks and developed specific ways of managing those risks.

The main risks identified by Homeshare Auckland are those associated with the increasing diversity of enquirers' backgrounds and needs, which have been growing over the two years of programme operation. Other risks identified are: the sharing agreement ending, changes in homesharers' circumstances, staff training, issues relating to the location of accommodation offered and sharer' preferences, and insufficient resourcing.

The main risks that HSfH have identified are risks to members' safety, and organisational liability. The organisers have put in place risk management procedures to protect members and the organisation at different stages of member's engagement with the programme. Participant autonomy is a key principle of the programme, and this is reflected in the approach to risk management.

Financial sustainability

Staff/organisers in the programmes commented that having sufficient resources is the key to programme sustainability. They noted the need for sufficient funding for staff, and advertising and promotions.

Conclusions

It is too early to come to definitive conclusions about the success of the programmes as they have been running for a relatively short time and have not reached full maturity.

Nevertheless, both programmes are broadly achieving what they set out to do. They have developed viable delivery processes that clearly address needs in their communities for a different type of housing solution. They offer homeowners/householders and sharers stable and affordable housing, a safe environment, mutual support and social relationships.

Age Concern designed and implemented a new programme and achieved four homeshares. As noted in the literature, programmes using the facilitated, intensive support model take considerable time and effort to secure a suitable match. HSfH has purpose-built an innovative programme that is in some respects still in development. As far as we are aware, this is the only type of homeshare programme in New Zealand based on an interactive website providing a contacting and matching service.

The programmes share a strong commitment to continuous learning and improvement, as shown in their willingness to encourage feedback from participants and make changes to policies and procedures. Neither programme has sought to grow quickly, but instead to progress carefully, build on existing strengths and address identified issues. Both programmes have invested in promoting the concept of homeshare and their programmes within their communities, which is an important pre-condition for success.

Irrespective of whether the facilitated or referral model is used, homesharing is a niche housing option that does not increase the numbers of affordable, secure dwellings. Nor is it designed to address urgent housing need. Nevertheless, homesharing can provide a suitable housing solution for some older people, either as householders or sharers. Homeshare's focus on relationships, mutual support and companionship distinguishes it from most other market and social housing options. Homeshare offers an opportunity for older householders living alone to connect meaningfully with others while staying in their homes for longer.

Typically, homesharing offers safe and secure housing, since the dwellings should meet certain condition, performance and suitability standards. Therefore, homesharing can provide more appropriate housing, especially for older people who would otherwise be renting.

The Age Concern programme has clearly made a positive difference to the older homeowners' ability to strengthen social connections and remain safely in their homes. HSfH shows the potential for homesharing to provide a housing option for middle-aged and older women owner-occupiers and renters.

Despite differences in focus and style of delivery, the experiences of the two programmes have revealed similar issues in relation to success and sustainability. These issues are:

- The pool of both those offering and those seeking a homeshare must be sufficiently large to achieve matches.
- Focusing the programme and its promotion on geographical communities and communities of interest is most effective. In that way the programme can be responsive to local conditions, networks, and needs.
- The coordinator role is critical to programme success.
- There must be a strong focus on consolidation, reviewing, learning and making changes as required, so that the programme continues to be relevant and fit-for-purpose.
- Risk identification and management strategies are needed.
- While the usual success measures of number of people in the pool and number of homeshares achieved are useful, other measures give a more comprehensive and nuanced understanding of achievements. Those measures include: positive feedback from programme participants; effectiveness of programme policies and processes; and increase in local awareness of the programme.
- Adequate and predictable funding is needed for programme viability.

If homesharing is to be supported to develop in New Zealand, further work is needed to address uncertain funding, develop realistic and relevant success measures, and to build on documenting procedures, policy and operational guidance and best practice guidelines designed for New Zealand conditions.

1. Introduction

In early 2023 the Office for Seniors (OfS) commissioned the Homeshare pilot delivered by Age Concern Auckland, which was the successful provider after an open procurement process. The pilot was evaluated and the findings presented in the Interim Report (June 2024). Subsequently OfS contracted Age Concern Auckland to extend the delivery of the Homeshare programme, to June 2025. In tandem, stage 2 of the evaluation of the Age Concern Auckland programme (Homeshare Auckland) was commissioned. A formative evaluation of the Homeshare for Her (HSfH) programme based in Nelson and Tasman has been included as part of the Stage 2 evaluation. A programme logic of HSfH is presented in a separate report (October 2024).

This evaluation includes consideration of two different homeshare models, the referral model, which provides a platform so that people can find and make homeshare matches themselves, and the facilitated model, which offers a comprehensive assessment, matching and follow-up service. Homeshare Auckland is characteristic of the facilitated homeshare model while HSfH is an example of the referral model (see Section 3 for discussion of these models).

The two programmes differ in their stage of operation. After December 2024 Homeshare Auckland ceased active recruitment of householders into their programme and instead maintains support of the established homeshares. HSfH continued in 2024 with a refreshed programme after reviewing its delivery in 2023 and introducing an improved interactive website in January 2024. Since the programmes differ in both their delivery approach and stages of operation, this has enabled the evaluation to develop insights into the strengths and weaknesses of different models, as well as issues and challenges arising at different stages of operation.

In considering the two homeshare programmes, this evaluation has been guided by five issues that arose early in the interviews with those delivering each homeshare programme. Despite differences in programme approaches and stage of operation, those issues were highly relevant to each programme as they concern programme success and sustainability. The issues are discussed in Section 6 and cover: how success is measured; how a sufficiently large matching pool is achieved; the programme processes and actions that contribute to a successful match; how risks are identified and managed; and funding challenges.

This report is structured as follows:

- Section 2 outlines the evaluation purpose, scope and method.
- Section 3 describes two homeshare models common internationally – the facilitated and referral models.
- Section 4 describes the Homeshare Auckland programme.
- Section 5 describes the Homeshare for Her programme.
- Section 6 explains how the two programmes have engaged with key issues concerning programme success and sustainability.
- Section 7 reports on the experiences of homeowners/householders and sharers/seekers in the two homeshare programmes.
- Section 8 summarises the evaluation findings, noting both commonalities and differences in the two programmes.
- Section 9 presents the evaluation's conclusions.

2. Evaluation purpose, scope and method

Stage 2 of the evaluation has two components. The first component continues the evaluation of the Age Concern Homeshare Auckland programme with a focus on delivery and outcomes, while the second component is a formative evaluation of Homeshare for Her.

The Homeshare Auckland evaluation has focused on:

- Homeowners' and sharers' perspectives and experiences of homeshare.
- Programme delivery processes and outcomes.
- Wellbeing outcomes for homeowners and sharers, particularly outcomes relating to:
  - Housing affordability
  - Tenure security
  - Personal safety
  - Social and intergenerational connection
  - Ability of the householder to age in place
- Key programme features critical for programme sustainability and transferability.

The evaluation of Homeshare for Her has focused on:

- The programme's characteristics, processes and activities.
- Whether the programme has been successfully delivered according to its overall goals and objectives.
- 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 to inform future policy and funding decisions, including programme viability and transferability.

The main methods for collecting data about each programme were:

- Programme documents, administrative data and reporting to OfS.
- Interviews with programme staff, and in the case of HSfH, trustees.
- Interviews with programme participants.

Details of the interviewing processes carried out with those involved in programme delivery and programme participants are described in the relevant sections below; sections 4, 5 and 7.

In addition to analysis of documents, administrative data and interviews, two rapid literature reviews were conducted to gather and summarise research findings relevant to the evaluation about:

- Homeshare models that have developed internationally. This is discussed in Section 3.
- The five issues emerging early in the Stage 2 evaluation that are critical to understanding how a homeshare programme works successfully and sustainably. The literature review is presented in Appendix 5. Section 6 discusses how those questions are addressed by Homeshare Auckland and HSfH.

3. International research literature about Homeshare

The research literature about homeshare programmes has identified two common models, the referral model, which provides a platform to enable homeshare matches, and the facilitated model, which offers a comprehensive assessment, matching and follow-up service (Gutman *et al.,* 1989; Martínez *et al.,* 2020). The literature identifies both the referral and facilitated models as viable, and notes that the prevalence of each type has differed over time and from place to place (Boyd-Noel, 1994). However, the facilitated model appears to be the most common model.

To identify the types of services provided by the two models, we did a rapid review of 119 overseas homeshare organisations, focusing on information about their activities published on their websites. Sufficient information was gathered from 112 websites to assess the range of services offered.

Organisations delivering homeshare programmes were identified in 18 countries (Australia, Austria, Belgium, Canada, Czech Republic, England, France, Germany, Hungary, Ireland, Italy, Japan, Netherlands, Portugal, Spain, Switzerland, USA, and Wales). Of the 112 organisations that provided sufficient information about their services, 92 operate facilitated models, while 20 operate referral models.

Regardless of the model used, almost all programmes have an intergenerational focus on older householders and younger people, such as students, seeking a homeshare. Some homeshare programmes focus on disabled adult householders and sharers of all ages (Bagnall, 2020; Hughson, 2013; Independent Advisory Council to the NDIS, 2018; Reid *et al.,* 2016). With regard to tenure, both models primarily focus on assisting owner-occupiers wanting a sharer (Magid *et al.,* 2022). However, there are a few homeshare programmes for older tenants who want a sharer. There are also a few examples where the organisation operating the homeshare programme provides rental housing and recruits and supports individuals to establish a homesharing arrangement (Gutmann *et al.,* 1989).

The inclusion of Homeshare for Her in Stage 2 of the evaluation was the catalyst for understanding two different homeshare models evident internationally. HSfH is effectively a referral model, while Age Concern Auckland’s Homeshare programme is effectively a facilitated model. Both programmes share a common genealogy/whakapapa, being influenced by international experience of designing and delivering homeshare programmes over the last 40-50 years, as well as benefitting from guidance and best practice developed over time. This is evident in the connection that Age Concern Auckland has with Homeshare Australia and New Zealand Alliance (HANZA), drawing on its policies, guidance and community of practice.

While both programmes can be seen as part of the international homeshare community, this is not to say that overseas models of homeshare can be simply transferred to and operationalised in New Zealand. Age Concern Auckland’s experience with establishing its homeshare programme showed that changes needed to be made to operational manuals provided by HANZA, to better meet the local context and needs of the communities in which the programme operates (see Interim Report).

The following is a description of the main characteristics of the two models – the referral and facilitated – showing their similarities and differences. In reality, a homeshare programme may operate anywhere on a continuum from helping to connect people offering and seeking accommodation, to provision of assessment, matching and on-going support.

3.1 The referral model

The referral model[1] aims to connect prospective homesharers. Accordingly, it focuses on the matching process, enabling those seeking and offering a homeshare to find one another and to achieve a match themselves. Some referral programmes interview applicants and make introductions. Some safety measures such as screening and applicant vetting may be done by programme staff. Other programmes simply provide a platform through which applicants can find compatible matches, e.g., by maintaining a housing registry and enabling platform users to contact one another. Once the match is made, the referral-type programme typically provides little or no follow up contact, although some offer mediation or referral to other services if needed.

3.2 The facilitated model

The facilitated model[2] has been described as a 'high touch' approach because a range of services in addition to matching applicants are offered (Magid *et al.,* 2022). These services typically include screening of participants, such as police and reference checks, and in some cases health checks. Interviewing of participants and facilitating introductions between householders and prospective sharers are routine. Transport for participants to meet may be provided. Assessing the suitability of the householder's home for sharing is common. Programmes assist with establishing the homesharing agreement, provide follow-up check-ins and support, offer referrals to other services such as legal, social, or health services, mediation if required and help with terminating a homeshare.

4. Homeshare Auckland

Age Concern's homeshare programme is an example of a facilitated model. The Interim Report (June 2024), along with the Programme Logic (September 2023), presented a formative evaluation of the programme. Those reports involved analysis of homeshare documents and administrative data as well as interviews with staff. No homeshare arrangements were established by the time the Interim Report was completed.

Findings from the Interim Report are included in the discussion below, along with updated information gathered from interviews with Age Concern staff involved in delivering the homeshare programme, and programme documentation supplied. Four interviews were held with three Age Concern staff between September 2024 and March 2025. Interview topics are presented in Appendix 1. Staff also provided various documents including the introduction guide for sharers, homeowner and sharer interview and assessment forms, the sharer reference check form, the form for recording notes from the introduction meetings, and the Personal Wellbeing Index form.

---

[1] For references describing the referral model, see Boyd-Noel 1994; Doyle, 1989; Gutman *et al.,* 1989; Johnstone, 1997 Martínez *et al.*, 2020; Webb n.d.

[2] For references describing the facilitated model, see Boyd-Noel, 1994; Doyle, 1989; Gutman *et al.,* 1989; Johnstone, 1997; Magid *et al.*, 2022; Martínez *et al.*, 2020; Tinkler *et al.,* 2019; Webb n.d.

After December 2024 Age Concern ceased promoting Homeshare, as the contractually required number of matches had not been achieved and consequently programme funding from the OfS was reduced. Nevertheless, the programme is expected to continue until June 2025, albeit at a lower level of operation. All participants have been advised that the programme is unlikely to continue after June 2025.

4.1 Programme purpose and focus

The programme 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 Auckland Council's area is covered by another Age Concern and consequently is not included in the programme's catchment.

The programme has two main objectives:

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

The programme provides a comprehensive homeshare matching and support service. Core activities include promotion, screening, vetting, and matching services, as well as support for the homeowner and sharer once the homesharing arrangement is established.

The programme has been fully funded through two contracts with OfS, which cover staffing and operational expenses. Age Concern does not charge fees to the older householder or sharer, as funding has enabled the programme to operate without charging a fee. As such the programme aligns with other Age Concern services, all of which are free. Age Concern may review the need to charge a fee in future if the programme continues in some form.

During the programme's establishment and implementation, the coordinator role was set up as a stand-alone role. In 2025 it was moved into Age Concern's Social Connections service. The staff time allocated to the programme through the first contract was 1.5 FTE. This allocation was envisaged to cover a full-time coordinator and additional staff time. However, that level of staffing was not achieved, although a part-time coordinator had a dedicated role, along with programme support from other Age Concern staff. With the reduction in funding since July 2024, the coordinator's time allocation has reduced and less time has been spent on promotional activities.

Nevertheless, the homeowners and potential sharers in the pool continue to be supported. Age Concern is working to match around 10 homeowners in the programme with sharers. Although it is not recruiting any new homeowners, sharers are still being sought to match with homeowners in the pool. Any current homeshares will be supported after June 2025 for as long as the sharing arrangement lasts.

4.2 Programme participants

The Interim Report noted that most homeowners in the matching pool are in their 80s and 90s and are mostly NZ European. Most of the potential sharers are women, ranging in age from late 30s to 60s. Sharers' ethnic backgrounds are more varied than the older homeowners.

Both homeowners and sharers have expressed a preference to share with women. Homeowners have expressed a preference for older sharers, aged 50 and over. However, Age Concern has found that homeowners are open to considering men as sharers, and the first two homesharing arrangements have been with male sharers in their thirties. It has also been found that homeowners are happy to share with someone of another culture, although there is some anxiety around different food practices. Some homeowners have asked for a sharer with a cultural background different to theirs, although some homeowners whose first language is not English express a preference for someone who speaks their language.

From the latter part of 2024, Age Concern staff received a wider range of enquiries from homeowners and sharers in terms of demographics, housing need and type of accommodation offered. Staff noted a growing number of homeowners in their 50s and older, including couples, who want to support an older person with housing, but who also need help with their own housing expenses. While those homeowners are prepared to offer a sub-market rent or board, this tends to be more than the payment amount the programme sets in its guidelines. Staff also noted receiving enquiries, usually from families, relating to homeowners with higher mental or physical health needs that could not be met through homeshare.

Age Concern is also receiving a wider range of sharer enquiries, particularly from older people, rather than young people, who are dissatisfied with their housing conditions or living environment. One example is an older renter living in a cold dwelling in poor repair. Other examples involve a lack of social connections or an unsuitable neighbourhood environment. Age Concern has also had enquiries from couples renting who are interested becoming sharers to reduce their housing costs.

Staff also report greater diversity in the types of accommodation that are offered. In addition to spare rooms (and use of dwelling facilities) typical of homesharing, more enquiries are offering a minor dwelling on the homeowner's property, or a rental property elsewhere. Some of the offerings are not suitable for the programme because they do not meet its companionship and mutuality principles, since the older owner does not live on the property. Other properties offered have not met house condition and performance requirements that the homeowner must sign up to when they sign the owner's terms and conditions agreement. Age Concern observed that homeowners' ability to make home improvements that would be compatible with the programme is often limited by their finances.

4.3 Core programme components and activities

The programme's core components are: promotion and advertising, assessment of applicants, facilitating introductions between prospective homesharers, supporting homesharers to establish the sharing agreement, and on-going support after a sharing arrangement starts.

Promotion of the programme uses Age Concern channels including the newsletter, members, and stakeholder networks. Over the two years of operation, promotion methods have expanded. There has been a greater emphasis on local promotions and advertising through brochures and flyers, print media, organisations, expos and networks, rather than generally across the Auckland region. There has been little use of social media, although Facebook community pages, some targeted social media and the Age Concern website have been used. There is an intention to create a video about Homeshare, including interviews with participants.

When Age Concern receives an enquiry about the programme, enquirers are provided with a package of information, to ensure individuals understand the programme's purpose, how it works, and participants' rights and responsibilities. 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, or 55 and older for Māori and Pacifica people.
- Willing to share their home with another person.
- Their home is suitable for sharing.
- They are living independently and not in need of 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 sharer are:

- Aged 21 and over.
- Has appropriate social and language skills.
- Is willing to share a house with an older person.
- Is willing to provide an agreed level of support to the householder in exchange for a lower accommodation cost.

As part of their application, the homeowner and sharer sign their respective Terms and Conditions documents. These documents set out the roles and responsibilities of Age Concern, the homeowner and the sharer, how changes in the sharing arrangement will be dealt with, and privacy and confidentiality. Homeowners and sharers also receive a document that sets out their rights and responsibilities in the programme, and a document outlining the complaints procedure. 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 sharers, but not from homeowners.

The matching process involves the sharer and homeowner meeting, firstly with an Age Concern staff member present and then without the staff member. Several meetings can occur between participants. Sometimes meetings include family of the homeowner. 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.

Once a match is established, the sharing agreement is signed. A formal written sharing agreement template is provided by Age Concern. This provides the framework for an agreement to be negotiated and agreed between the homeowner and the sharer. The agreement covers the roles and responsibilities of the homeowner and sharer, and how their relationship will be conducted. It includes procedures for the sharer's payment of the lodging and utilities fee, the sharer's use of the property's facilities, practical support provided by the sharer to the homeowner, dispute resolution process, and termination of the sharing agreement.

There is a one-month trial period after homesharing starts. If the parties wish to continue after that time, Age Concern provides on-going support, including regular phone contact with the homesharers and a monthly visit. Support can also include mediation and assistance with termination of the sharing agreement.

4.4 What is working well

The Interim Report concluded that Homeshare Auckland 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 Homeshare Australia and New Zealand Alliance (HANZA). This is because programme elements were tested and refined throughout the first year of implementation and operation. As a result, changes were made to improve operational processes, and to better meet the needs of the communities in which the programme operates.

In the second year, Age Concern has continued to make refinements as needed. Considerable effort has also been put into documenting and reviewing matches that have been achieved, to learn from what has worked or not worked. These reviews have led to changes including:

- Recording the steps required to achieve a sharing agreement.
- Creation of an induction guide for the sharer.
- A greater focus on preparing both the sharer and the homeowner for what homesharing will be like.
- Identification of whether the homeowner and sharer have any support network and what role that might play in the sharing agreement.

Over the two years, the pool of prospective homeshare participants has grown. Considerable efforts have been made to respond to enquiries and complete assessments to increase the pool. There was also considerable effort to refine promotional and marketing activities. These have changed over time to focus more intently on community-based advertising, expanding channels to reach sharers, using different marketing strategies to reach older householders and sharers, and tailoring advertisements to find sharers for individual householders. Extending the range of approaches to generate enquires has been effective.

Homeshare’s operation within Age Concern Auckland has enabled the programme to benefit from Age Concern’s organisational infrastructure, and the support, skills and networks of other teams. Similarly, the Homeshare team has benefitted from training and on-going support provided by HANZA, which has helped staff increase their understanding of Homeshare and their ability to implement it.

The programme’s relationship with programme participants has worked well. Homeowners and sharers have given positive feedback about the information and support provided (see Section 7 below).

4.5 Challenges

The key operational challenges reported in the Interim Report included:

- The need to increase public awareness and knowledge of Homeshare.
- Turning successful matches into homesharing arrangements. A few matches did not go ahead, due to changes in circumstances of participants.
- Establishing a pool of sharers that is big enough to enable compatible matches to be made.

- Maintaining adequate staff capacity for the programme.
- Dedicating sufficient time and resources across the establishment, implementation and recruitment/matching stages. Initially the intensive time requirements for those tasks were not anticipated by Age Concern.
- Deciding where and how to promote Homeshare, given Auckland's large geographical area with its diverse communities.
- Addressing policy issues 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.
- Managing unexpected costs, such as additional work needed on documentation changes and data collection and instrumentation. HANZA programme manuals and procedures required additional design work to adapt documentation to the NZ context.

Since July 2024, additional challenges have been identified. Age Concern reported in September 2024 that more people have been declined at the initial enquiry stage as they do not meet programme criteria. Examples include homeowners with cognitive impairment, mental health/wellbeing issues, or needing a higher level of care than the low-level support provided by sharers. There have been homeowner enquiries from outside of the programme's catchment area, or on the fringes of the Auckland region. The former cannot join the programme and the latter's location considerably reduces the likelihood of successfully matching the homeowner with a sharer. Sharer circumstances that have resulted in them assessed as unsuitable for the programme include couples and small families wanting accommodation.

4.6 Outcomes

By March 2025, four homeshares had been achieved. These were:

- A homeshare starting in July 2024, which lasted over five months. This ceased due to change in the sharer's circumstances. Both the homeowner and the sharer have remained in the programme to be matched again.
- A homeshare starting in September 2024, which ceased after about five months due to changes in the homeowner's circumstances. Neither the homeowner nor the sharer have stayed in the programme.
- A homeshare starting in February 2025.
- A homeshare starting in March 2025. This is the second homeshare for the homeowner.

Wellbeing outcomes for homeowners and sharers were intended to be measured by Age Concern using the Personal Wellbeing Index (PWI). Assessments were done with participants at the on-boarding stage, and after a homeshare ended. However, the few matches that have been achieved provide insufficient data for analysis.

Homesharers' perspectives of the benefits of homesharing they have experienced are discussed in Section 7.5.

4.7 Programme improvement and future intentions

Age Concern continues to receive enquiries from homeowners, sharers and family members about the programme. Despite reduced funding, Age Concern is actively working to match participants in the pool, and to seek more sharers.

Staff identified several areas where they would like to see programme improvements. Three suggestions focus on aspects where Age Concern could make improvements. These cover: growing the matching pool; expanding the programme to different ethnic communities; and assisting sharers when their sharing arrangement ends suddenly. The fourth suggestion concerns expanding training resources, which would indicate a key role for an external agency.

Over the programme's life staff have looked for the best ways of targeting promotions to grow the pools of both homeowners and sharers. Staff report that finding the different effective approaches for each group (sharers and homeowners) has been challenging, but focusing on local organisations and networks, and environments where young people are, such as tertiary education, have proved effective. The transfer of the homeshare co-ordinator role into the Social Connections group within Age Concern is also an opportunity to extend the programme's reach through additional networks.

Age Concern would like to expand promotion of the programme to different ethnic communities, mainly South Asian and Chinese communities. This can be done through Age Concern's Ethnic Communities team and other Age Concern programmes such as the digital literacy programme. Age Concern already operates a Facebook page and a WeChat account focusing on Asian communities. Expanding to a wider range of communities will require translation of information about Homeshare and identifying the most effective ways of connecting with those communities. There may need to be greater use of translators to manage situations where sharers or owners do not have English as their first language.

Age Concern intends to expand its relationships with local organisations that could provide help to sharers if they need support in the event of a sharing arrangement ending suddenly. Currently most of Age Concern's close relationships are with other organisations supporting older people.

With regard to training, staff suggested that detailed scenarios of real-life situations could be developed as guidance for addressing participants' questions, and managing risks, issues and sudden events. Examples of possible scenarios included:
- A homeowner's death.
- Provision of advice to the homeowner about whether to allow sharer's access to credit or debit cards for shopping.
- How to manage the sharer's absence for a period, such as a holiday.
- Circumstances in which a sharing agreement would be terminated, and what would happen after that.

5. Homeshare for Her

Homeshare for Her is an example of the referral model. The Interim Report provided a summary of HSfH and a programme logic was reported in October 2024. The following discussion summarises key points in those documents and is expanded with information provided by HSfH. Between September 2024 and April 2025, six interviews were held with three trustees and the coordinator involved in programme delivery. Appendix 2 presents the interview topics. Trustees and the coordinator also provided data and information relating to website resources, membership data, and feedback from members.

5.1 Programme purpose and focus

HSfH was established in 2021 and became a charitable trust in 2022. It operates in the Nelson-Tasman region, although its focus is primarily on the urban areas of Nelson City and Richmond. The type of homeshare model that HSfH operates is a referral or 'match-making' one, designed to help women find a compatible match for homesharing. Women registered with the programme become members who have access to an interactive online platform designed to assist them to find house mates. While there is coordinator oversight with some support, essentially the programme enables women to identify and establish a match by themselves. HSfH does not provide on-going support after the sharing arrangement is established, such as follow-up, mediation and termination services.

The catalyst for establishing HSfH emerged from community consultations that Community Action Nelson conducted about housing issues, and through connections with organisations such as the Women's Centre and Age Concern. From those engagements, a group was set up to establish a service to help women offering accommodation and needing accommodation to connect with one another.

The overall purpose and outputs of HSfH differ from some homeshare programmes, in its emphasis on providing a service specifically for women. Although those women are most likely living alone, the programme also includes women with children seeking or offering accommodation. HSfH is designed to address two main issues:

- The housing needs of women, particularly solo women and, potentially, women with children.
- The difficulties women have in finding suitable housing options and house mates.

HSfH has identified the main housing needs of householders (homeowners or renters) as including help with housing and/or living costs, assistance with some household tasks, and for some, companionship. Home seekers tend to need an affordable, safe and secure living situation. While the programme is for women of all ages, in practice women aged 55 and over are well represented among members and the programme appears to have particular benefits for older women, as noted in Section 7 below.

Although HSfH caters for some women with pressing housing needs, it is not a crisis housing service, nor an alternative to emergency accommodation. While not purporting to be a solution to local housing problems, HSfH has been designed as an alternative housing opportunity for women who are under-served in the housing market and who are unlikely to be eligible for social housing. The programme creates a new housing choice in a local housing market with constrained supply of affordable and suitable accommodation, especially for older and single women.

The outcomes that HSfH seeks for householders and home seekers are:

- Improved housing affordability and stability.
- Improved companionship and social connection, including intergenerational connection, among women.
- Improved personal safety.
- Mutual support – women helping other women.
- Better and more flexible use of housing stock.

HSfH operates as a charitable trust and a stand-alone entity, rather than under the umbrella of another organisation. It has established its own governance and organisational infrastructure. The latter is modest as there are no physical premises or permanent staff. Programme delivery relies on a board of trustees, a paid contracted co-ordinator, and contracted professional assistance as required.

The main method of funding is through grants. HSfH currently has grant funding from Rātā Foundation, Nelson City Council and the Office for Seniors. In the past it has received grant funding through the Department of Internal Affairs, the Ministry for Women, and the Tindall Foundation. The trustees are volunteers.

5.2 Programme participants

The programme includes women from age 18. Although serving all ages, women aged 55 and over are a large proportion of registered members. Householders are likely to live alone and to be in the middle-aged and pre-retirement age groups. Home seekers range from young women in their 20s to women in their 80s. Older home seekers (aged 65 and over) are well represented.

In early April 2025 there were around 200 seekers registered as members. Of those, 110 had published their profiles on the HSfH website. There were about 86 householders registered, and 28 of those have published their profiles with offers of accommodation.

Examples of Homeshare for Her members

Middle-aged homeowner living alone in a large home, who has established a homeshare with a sharer of a similar age.

Younger woman with a child looking for a sharer.

Older homeowner living alone who has had flatmates in the past, looking for a sharer.

Older tenant looking for a sharer.

Older homeowner wanting to move to Nelson-Tasman to be closer to family, seeking accommodation.

Older woman in Air B'n'B, seeker.

Tenant looking to move to Nelson-Tasman, seeker.

Tenant living in Nelson, wanting to reduce housing costs, seeker.

5.3 Core programme components and activities

Akin to the referral model of homeshare, HSfH has concentrated on providing a safe and effective online platform through which women seeking and offering accommodation can find a compatible match. The website is the main service provided by HSfH.

This online delivery approach was chosen after the programme pilot was reviewed. The pilot programme consisted of a website, along with facilitators who met face-to-face with applicants and facilitated matching. However, this approach was found to be ineffective in achieving matches, due to the considerable time demands on facilitators, as well as its limited reach and resource intensiveness. Consequently, a refreshed interactive website was launched in early 2024, and the role of coordinator was continued without the intensive facilitation approach of the pilot. The website has been found to be the best way to support women who feel uncomfortable about using general online accommodation seeking services such as Trade Me or Facebook Marketplace.

Householders and seekers become members of HSfH by registering on the website. Registration then allows them to post their profile and connect with other members. Householders' profiles include information about the accommodation offered and themselves, while the seekers post information about themselves and the type of accommodation they seek.

Seekers can search for a match by using key word filters, including age, price, and location, as well as pet-friendly or children-friendly accommodation. The organisers are considering whether more filters should be added to extend and streamline the search facility for seekers.

Women offering accommodation can search for seekers on the basis of shared interests or preferences using key words, however there is only a result if the search word is used in a seeker's profile. Topics searched for by householders include vegetarian, cooking, garden, work and specific locations within the Nelson-Tasman region.

Women who have made matches set up their own homesharing arrangement, agreeing on the amount of payment for accommodation and any terms or conditions of homesharing. HSfH has no role in negotiating or facilitating those arrangements.

Nevertheless, the programme provides support through the website's guidance and information resources, which are available only to members. These help members craft their profiles, search for and find a compatible house mate, and set up a homesharing arrangement. Resources include:

- An explanation of the Homeshare for her process.
- Tips for creating a profile.
- Various accommodation sharing agreements including the HSfH accommodation sharing agreement template and the Tenancy Services flat/house sharing agreement.
- A booklet on communication and relationship-building in homesharing.
- Questions for homeowners to ask home seekers.
- Questions for home seekers to ask homeowners.
- Questions for homeowners to ask referees.
- Information about how to obtain police and credit checks.
- Frequently Asked Questions.
- Links to other websites providing additional information and guidance, such as Citizen's Advice Bureau, Community Law and Nelson Tasman Housing Trust.

Since launching the new website, various improvements have been made to the website's navigability and its messaging facility. There is an intention to improve the website's visual accessibility to help blind and low vision users, if funding is obtained. Further development of processes, resources and templates is also planned.

As well as the website resources that are designed to assist members, the coordinator supports members by checking and ensuring that individuals meet eligibility criteria, monitoring and moderation of posts as required. The coordinator also provides information about the programme and advice on how to craft a profile.

As well as operating the website, other key activities in the delivery of HSfH are:

- Marketing and promotion through a wide range of channels such as the website, online advertising, social media (Facebook and Instagram), radio and print media, local cinema advertising, billboards, brochures, presence at local markets and events, and presentations to local organisations.
- Regular meet-ups between householders and home seekers, established in 2024 and intended to be held quarterly. So far, three of these events have been run. They are used as a way of promoting the programme and encouraging matches. They also act as an information forum where members can ask questions of HSfH organisers.
- Data collection, reporting and review. Once the initial pilot was complete, HSfH engaged an external reviewer to recommend improvements. In addition, on-going refinements are made to improve website functionality. Surveys are used to monitor programme effectiveness by collecting information from members about their experiences of the programme.

5.5 What is working well

Considerable effort has been put into promotions and marketing, in order to grow the matching pool and to increase familiarity with the homeshare concept within the community. These efforts have been shown to result in a rise in website registrations. The organisers consider that promotional efforts have increased the programme's profile locally, and due to national media coverage, there has been some interest from other regions as well.

There has been a strong focus on making improvements to the website so that it meets users' needs.

The meet-up events have been very successful. This face-to-face component adds value to the programme.

5.6 Key operational challenges

The main operational challenges that HSfH identifies as impacting on the ability to achieve to achieve the programme are:

- Availability of adequate and sustained programme funding. Resources are needed for a coordinator (where most of the funding goes), maintaining and improving the website, and advertising and promotions.
- Low public awareness and understanding of homesharing, its characteristics and benefits. HSfH has worked to increase community awareness through extensive local promotions, engagement with local organisations, and running the meetups.
- Reliance on trustee volunteers to do much of the day-to-day work of the organisation. This situation reveals the challenges in balancing governance requirements and a strategic focus with everyday demands of running a service. HSfH has had interest from others wishing to volunteer with the programme, however the organisation is not in a position at present to allocate tasks and to oversee volunteers.

5.7 Outcomes

Because HSfH facilitates connections between women offering and seeking accommodation and does not provide an on-going service once a match is made, there is no simple way of identifying those who have formed a homesharing arrangement through the programme. Nevertheless, the organisers estimate that six homeshares have been established through the programme. This estimate is based on data that HSfH collects from website interactions.

This evaluation was able to identify five women in homesharing arrangements through contacts made for interviews. Four women had established a homeshare through HSfH, while one woman was a member but had established her current homeshare outside of the programme. She had also established a short-term homeshare previously through the programme.

5.8 Programme improvement and future intentions

The main improvements that HSfH organisers would like to undertake are:

- Expanding funding sources so that the programme is not totally reliant on one funding source.
- Partnering with other organisations to provide complementary services, resources or expertise, to provide additional support to members.
- Formalising some policies and procedures.
- Updating the risk register and establishing a formal risk management process.
- Reviewing how to improve the programme's reach in rural areas of Nelson-Tasman.
- Continuing efforts to increase the members' pool. This may include increasing support to members to craft and post their profiles.
- Continuing to improve the website functionality, including visual accessibility.
- Improving ways of capturing data to measure the number of matches made through the programme.

HSfH aims to create a replicable organisational structure and web-based processes that can be taken-up in other areas. The programme has received interest from other areas, both from women offering or seeking a homeshare arrangement, and organisations potentially interested in partnering with HSfH or setting up a similar service in their areas. Enquiries have been received from Northland, North Auckland, Hamilton, Thames, Wellington and Marlborough.

6. Success and sustainability

Early in the Stage 2 evaluation, conversations with Age Concern staff and HSfH organisers revealed several common issues both programmes encounter, regardless of the model they operate. These issues tell us a lot about what works to achieve a successful and sustainable homeshare programme.

We undertook a rapid review of selected literature to explore the issues:

- How is success measured?
- How is a sufficiently large matching pool achieved and maintained so that matches can be made?
- How is a successful match achieved – what programme processes and actions contribute to a successful match?

- How are risks to the programme and participants identified and managed?
- How is the financial sustainability of the programme achieved?

Findings of the rapid review are reported in Appendix 5. This section reports on how the two programmes address those issues. It starts off with discussion of success measures and then focuses on four key issues that the literature identifies as affecting success.

This section includes information from interviews with three Age Concern staff involved in delivering the Homeshare programme in Auckland, and three people (two trustees and the coordinator) involved in delivering HSfH. Interviews were conducted from September 2024 to early April 2025.

6.1 Measuring success

The rapid review found that homeshare programmes commonly use the following measures to gauge success: the number of matches, the length of time taken to secure a match, and the duration of matches. However, evaluations caution about using those as the only or primary measures as they may not reflect the benefits of the programme, nor its responsiveness to participants. Other measures used in homeshare programmes include: participant satisfaction with the homeshare programme; participants' health and financial benefits; reduced social isolation; and quality of life improvements.

The two programmes include a measure of success relating to numbers in the matching pool. Both are also concerned to measure the efforts put into programme activities that are important for achieving matches. Like other programmes in the literature, they take a view of success that is wider than simply the number of matches, and consider aspects of participant satisfaction, benefit and wellbeing.

Homeshare Auckland

Age Concern measures the success of its homeshare programme in the following ways:

- Number of people in the matching pool. Age Concern commented that they have worked to build the numbers of both homeowners and sharers, by increasing recruitment through various promotions and networking in communities, as noted above.
- Positive feedback from programme participants about their experiences throughout the programme, from the enquiry stage, to matching, to establishing a sharing agreement. Age Concern collects feedback directly from participants through on-going contact with them.
- The programme policies and processes work well and as intended. Staff note that it has taken considerable time to develop and put in place effective and coordinated processes, which they consider now enable the programme to work smoothly.

Age Concern also collects data on programme activities (inputs) that are critical for achieving successful matches. These measures include the number of: promotion and marketing channels used, enquiries, assessments completed, on-boarding completed, vetting completed, introductions, homeshare agreements established, and home visits and phone calls after a homeshare starts.

Homeshare for Her

HSfH uses the following measures to gauge success:

- Number of registered members. Registrations have grown steadily over 2024-2025. HSfH sees this as a useful measure, because of the need to ensure enough women in the pool so that successful matches can be made.
- Increase in local awareness of the programme. The organisers consider that the profile of the programme has been consistently raised in the community through a wide range of local advertising and relationship building with local organisations such as the Women's Centre and Nelson Marlborough Institute of Technology.
- Positive feedback about the programme. HSfH receive feedback at the meet-ups, through Facebook and through occasional member surveys. The surveys are used to collect information about the website and whether members would like more support.

HSfH acknowledge that the number of matches made through the programme is a useful measure, even though this is hard to measure because HSfH is not involved in the matching process. Although HSfH can monitor the interactions on the website, those members in the process of making a match, or who have entered a homeshare tend to move from communicating through the website messaging facility to communicating off-line.

A range of data are collected on programme activities. These include: the number of promotion and marketing channels used, Facebook page audience data, and HSfH website data.

6.2 Achieving and maintaining the matching pool

As noted in the rapid review, the pool of homeowners/householders and prospective sharers must be large enough to achieve matches. However, this is challenging. Homeshare evaluations have consistently found that the main way to grow and maintain the matching pool is to broaden the reach of the programme. This is generally achieved through: raising community awareness of the homeshare concept; using a range of marketing channels; engaging with other organisations; widening the target groups; and tailoring marketing and promotions to specific geographical areas and communities.

Both Age Concern and HSfH are aware of the need to increase the pool of those offering and those seeking a homeshare. They have worked on increasing their profiles in their respective communities and encouraging engagement of householders and prospective sharers with their programmes. Their methods of achieving and maintaining the matching pool are outlined below.

Homeshare Auckland

Age Concern has expanded its promotional activities to reach a broader range of groups. It has endeavoured to simultaneously promote the programme to both homeowners and sharers, having found that only promoting to one group results in declining enquiries from the other group. Between July and September 2024 Age Concern ran 14 promotional events at local venues and organisations across Auckland, including seniors' organisations, expos, community boards, tertiary education providers and health services.

To build the sharer pool Age Concern has increased its marketing to potential sharers. Sharers' circumstances can change quickly, resulting in them leaving the programme.

Accordingly, there must be continual efforts to expand the sharer pool. Since July 2024, Age Concern has focused on contacting tertiary students through holding campus meetings and events to promote the programme. This has led to an increase in student applications.

Various ways of reaching older people have included holding information sessions at organisations such as Probus, the RSA, Lions, and Rotary. Age Concern has also promoted Homeshare through its own programmes such as the Volunteer Service and Community Connections team. Age Concern provides much of the information to older people in hard copy, such as brochures and fliers, as this makes information easily accessible. Age Concern's data indicates that older people find out about Homeshare through the brochures available in libraries, community centres, and community groups. Age Concern also receives a lot of enquiries from family members on behalf of their older relative.

While efforts to increase the pool through extensive promotion have been beneficial, staff also note an increase in applicants being declined, because of their not meeting the programme's justifiable eligibility criteria or in other ways being unsuitable for the programme. While this poses a risk to growing the pool as the pre-condition for generating matches, it is reflective of intensifying housing pressures affecting seniors, rather than inappropriate eligibility criteria.

Homeshare for Her

HSfH organisers are aware of the need to increase both the number and diversity of women offering and seeking accommodation. They note that there are often gaps between a member's accommodation needs and the type of accommodation offered. For example, in April 2025, of the 28 accommodation offers, eight would consider pets. Only three accommodation offers would consider children, however, there were 17 seekers with children registered.

HSfH organisers have worked to increase the matching pool by:

- Holding regular meetups, which provide a way of both increasing knowledge and awareness of the programme and increasing opportunities for contact through providing a supportive environment for prospective homesharers to meet. The organisers have noted that fewer seekers than householders attend and consequently have worked to encourage attendance at meetups by directly contacting members seeking accommodation. The organisers reported that there is a rise in registrations immediately after each meet-up.
- Encouraging members to publish their profiles on the website, to make it easier for people to identify a possible match. The organisers note that it has been a challenge to encourage members to make their profile visible. At one point only about one half of members had made their profile visible to others.
- Using a wide range of marketing methods, although organisers note that it is sometimes hard to identify which are the most effective methods. The organisers have noticed a leap in registrations after local media stories about the programme.
- Establishing relationships with other organisations, such as the Women's Centre and Nelson Marlborough Institute of Technology. Those contacts help to expand community understanding about HSfH, and to raise awareness of the programme among prospective homesharers.

6.3 Achieving a successful match

The rapid review identified programme components that help to achieve a homeshare arrangement that is successful for both householder and sharer. These include:

- Accurate portrayal of the principles and aims of homesharing.
- Having a dedicated coordinator.
- Clear and detailed programme policies and procedures.
- Appropriate staff training.
- Explicit eligibility criteria for householders and sharers.
- Strong preliminary vetting processes.
- Matching processes that identify householder and sharer expectations and needs.
- An easily understood and comprehensive sharing agreement.
- Appropriate support for homesharing participants, and at times when they need it.
- Good communication between programme staff and homesharers.
- Support for homesharers to manage any communication issues or conflict.
- Ability to refer homesharers to appropriate supports outside of the programme if needed.
- Many programme providers also facilitate involvement of the householder's family to support the sharing.

Many of these features are present in the two homeshare programmes. Both have clearly communicated the principles and aims of homesharing, have a dedicated coordinator, and explicit eligibility criteria. Both programmes have a strong emphasis on encouraging good communication between households and sharers, as well as between the programme staff/organisers and participants.

The two programmes provide various types of vetting, support, and matching processes, although the nature and extent of these differ due to the type of homeshare model they follow. The referral model, typical of HSfH, has much less emphasis on assessment and matching of participants than does the facilitated model followed by Homeshare Auckland.

Homeshare Auckland

As an example of the facilitated model of homeshare, Homeshare Auckland has intensive contact with programme participants at all stages of their homeshare journey. Staff report that a significant contributor to achieving successful matches has been the improvement of processes for assessment, vetting and facilitating a match, by applying what has been learned from the first match.

Increased efforts and care have been devoted to preparing both the sharer and the homeowner for what homesharing will be like. More time has been spent on preparation of both parties before any introduction meeting takes place between the two. In the coordinator's experience, if there is insufficient preparation time, then the introduction meeting does not go well.

Prior to introducing the sharers and homeowners, they are asked to fill in a comprehensive assessment form covering a range of topics. Those include their background, hobbies, interests, reasons for enquiring about homeshare, needs, and any preferences for the type of person they would like to share with. In addition, the homeowner is asked whether they have any mobility needs or health conditions and whether they receive any home support. The homeowner is also asked about the dwelling's condition and facilities provided for the sharer. Sharers are asked about their current living arrangements, whether they work or study, the help that they would offer the homeowner and their back-up plan if the homeshare ceases. The forms feed into both the introduction meetings and the sharing agreement, should a match eventuate. Forms ensure consistency in coverage of topics in the introduction meetings, and that all key areas required for the sharing agreement are considered.

The coordinator has several conversations with each participant before they meet a potential house mate. Conversations cover topics such as: an explanation of the programme and processes, interacting with people of different ages and cultures, and exploring what homesharing involves. Participants are asked to talk about their reasons for enquiring about homeshare, as well as their needs and expectations of homeshare. There is also discussion about the sharing agreement and any requirements or preferences they would like in the agreement.

More preparation is done with the sharer than with the homeowner. The sharer receives an induction guide, which Age Concern has developed. The guide is based on the guide for volunteers who provide Age Concern's visitor service, as well as the HANZA homeshare manual. The guide aims to manage sharers' expectations about living with older people. Topics covered include an explanation of the homeshare programme and the sharer role, tips on achieving good communication and social connections with the homeowner, how to manage problems and emergencies, and cultural considerations. There is no equivalent induction guide for the homeowner.

Staff emphasise the importance of managing homeowners' expectations. Most homeowners said they would like to share with a woman, but in the first two homeshares, both sharers are men. The two homeowners in those sharing arrangements started off with a preference for women sharers but were open to meeting male sharers. Homeowners do not seem to be reluctant to share with someone of another culture, although there is anxiety around different food practices. Some homeowners specifically ask for someone with a cultural background different to theirs, although other homeowners whose first language is not English express a preference for someone who speaks their language.

An important aspect of achieving a successful homeshare involves managing the expectations of homeowners and sharers, both before and after a match is made. Staff gave examples of having to manage expectations about living habits, routines and food preferences. They have found that different preferences and expectations about food and meals is one of the biggest tension points, but at the same time the sharer preparing and sharing a meal with the homeowner is one of the most popular, and appreciated, tasks. Food expectations and preferences need to be well understood and dealt with appropriately in the sharing agreement.

Another area where the sharer's and homeowner's expectations differ is about the use of utilities, and increased utilities costs. Where the prospective sharer has been an international tertiary student, there have also been differing expectations about prolonged absence during holiday periods or the possibility of other family members joining them in a homeshare, and in some cases these expectations have revealed that homesharing is not a suitable option.

Staff commented that fostering effective communication between the sharer and homeowner is key to achieving a successful match. This was learned from achieving the first successful match. Good communication enables the participants to be clear about their expectations and needs. Staff also observed that participants' open and honest communication with the coordinator is critical to establishing a success match.

Another requirement for creating a successful match has been to understand the connection of the homeowner with their family and any expectations or concerns family members might have about homeshare. As noted above, Age Concern receives many enquiries from families about the programme. Age Concern has found that many prospective homeowners have supportive family, who like the concept of homeshare. Nevertheless, some families expect the programme to deliver a higher level of care than it is designed for or have other misconceptions about the sharer's role. Therefore, part of putting in place the conditions for a successful match is to involve the family in conversations with the homeowner about homeshare and ensuring that a family member meets the prospective sharer.

Finally, staff identified location as a key enabler or impediment in establishing successful matches. Location is very important to sharers. Most are looking for a homeshare in the area where they have existing connections. Staff noted there is often a mismatch between the locations desired by sharers and where homeowners live. For sharers, a location far from their work or study impacts on their transport costs and can therefore reduce the desirability and financial benefits of homesharing. Location downsides can be somewhat mitigated if there are good public transport links close to the homeowner's home. Age Concern has increasingly focused their promotions and networking at a local level and has found this to be an effective way of both growing the pool of potential homesharers and contributing to successful matches.

Homeshare for Her

HSfH organisers identified several aspects of programme operation that they believe contributes to successful matches. Information and guidance resources on the website are an important tool to foster successful matches. These are used to explain HSfH's purpose and process so that women understand the programme's aims, policies and procedures. Local social media is also used to increase understanding of the programme. A key message has been that the programme is not for people who have a housing crisis.

The resources offer guidance to help prospective homesharers to safely communicate, identify compatible matches, establish homesharing agreements, and manage sharing together. Members are encouraged to publish their profiles with sufficient information about themselves and the accommodation they are offering or seeking. The coordinator provides one-to-one assistance with crafting a profile to those who want it.

The organisers comment that they encourage openness and honesty in communications among members. They emphasised that members providing full information enables those looking for a compatible match to make an informed decision. Examples were given of women disclosing a male partner or boyfriend, or a person identifying as transgender, in their communications so that others would be aware of their circumstances.

The organisers note that the meet-ups are an effective way to foster successful matches, as these enable women to get to know one another, as well as becoming more familiar with the programme's aims and processes.

HSfH organisers have considered whether offering more support and follow-up to members would increase the number of successful matches. However, at present the organisation does not have the resources required to provide more intensive support. Organisers are also cautious about potentially taking on greater organisational risk and liability if they become more actively engaged in vetting and matching processes. Nevertheless, they see the potential to partner with an organisation that has the infrastructure and procedures to provide on-going support to members and some of the features associated with the 'facilitated' homeshare model, such as obtaining referee reports, police checks or offering mediation.

6.4 Risk management

The main types of risk for homesharing programmes identified in the rapid review are: lack of public awareness of homesharing; participants' anti-social or abusive behaviour; and change in participants' circumstances.

The two homeshare programmes identified somewhat different risks. The main risks identified by Age Concern are: the increasing diversity of enquirers' backgrounds and needs; the sharing arrangement ending; changes in participants' circumstances; staff training; locational issues; and insufficient resourcing. The main risks that HSfH organisers identified are risks to members' safety, and organisational liability.

Successful risk management actions identified in the literature include:

- Obtaining legal advice on organisational policies and procedures.
- Obtaining appropriate organisational insurance.
- Risk assessment training for staff and operating a risk register that is regularly reviewed.
- Providing comprehensive information to applicants about homesharing.
- Explicit eligibility criteria for entry to the programme and undertaking rigorous assessment of applicants.
- Assessment of the suitability of the householder's home.
- Taking the time that is needed to make a compatible match, and not rushing matches for the sake of increasing the number of matches.
- Regular contact after a match is made.
- Having a plan for managing any abuse.
- Provision of a complaints process.

Fostering participant autonomy is noted in the literature as an important way of reducing organisational liability. This practice goes beyond ensuring informed consent, to actively encouraging participants to make decisions and take responsibility for their decisions.

Both homeshare programmes have used some of the risk management approaches identified in the literature, such as obtaining legal advice, providing comprehensive information about homesharing to applicants, using eligibility criteria and declining enquiries if necessary. Each has also identified its own risks and developed specific ways of managing those risks.

Homeshare Auckland

The main risks identified by Age Concern staff are those associated with the increasing diversity of enquirers' backgrounds and needs, the sharing agreement ending, changes in homesharers' circumstances, staff training, locational issues and insufficient resourcing.

Staff noted that, over the programme's duration, increased heterogeneity of enquirers' backgrounds, social and housing needs has become apparent. This diversity has contributed to an increase in people deemed unsuitable for the programme. For example, homeowners may not have accommodation that is suitable for homesharing or is in poor condition. Homeowners may also need a higher level of care than can be offered through homeshare. Potential sharers often have a pressing need for housing, as their current accommodation is unaffordable or in other ways unsuitable, however their immediate need may not be able to be met through a compatible match. The range of enquirers' situations and needs highlights the importance of using eligibility criteria, and comprehensive assessment of applicants.

Sharing agreements can end, either as planned, or due to incompatibility, or a sudden change in circumstances, such as illness. To mitigate risks to the sharer in the event of a sharing agreement ending, Age Concern requires the sharer to have a back-up plan for their accommodation. Referring the sharer to other organisations for support is also part of managing that risk, and Age Concern intends to expand its relationships with local organisations that could provide help to sharers under 65 years. Age Concern can provide help to the homeowner through other programmes it delivers, as well as referring them to other organisations for support. Staff also look at how they can re-match someone whose homeshare has ended. Since comprehensive assessments of participants have been done at the original on-boarding stage, this helps with streamlining the re-matching process.

Changing circumstances of either the homeowner or the sharer can require a change in sharing arrangements, or sometimes a change to the sharing agreement. The homeowner's and sharer's terms and conditions documents set out processes for dealing with both foreseen events, such as a holiday, and unforeseen events, such as illness. However, there are additional ways that changes are managed. One way that a known future change in circumstances is managed, is by planning for the change. This involves discussions between the coordinator, homeowner and sharer, and in some instances, with the homeowner's family as well. In one example, the timing of a sharer's holiday was known well in advance. The coordinator worked with the homeowner and family to ensure support would be provided to the homeowner during the sharer's absence. Another way of dealing with needed changes is to identify them through a six-month review of the sharing agreement. This enables both homeowner and sharer to suggest changes to sharing conditions.

Potential mismatches between the locations offered by homeowners and locations desired by sharers is an on-going issue, with implications for growing the matching pool and achieving successful matches. This risk is largely managed by targeting promotions locally, creating tailor-made advertisements seeking sharers for particular homeowners, and a focus on connecting sharers to homeowners in preferred areas, or that are close to public transport.

Training was identified as a potential area of risk by staff involved in the programme. Staff report that almost 500 hours have been used in professional development, including project building and training, team development and networking. Staff have found significant benefits from their relationship with HANZA, being part of the HANZA community of practice, using their homeshare materials and receiving on-going support. Nevertheless, staff commented that additional training resources to help answer homeowners' and sharers' questions would be useful (see Section 4.7 above).

Finally, staff commented that having insufficient staff and funding resources to sustain the programme is a potential risk. The Interim Report noted that staff reported that funding to operate the programme has been sufficient. The biggest expense has been for staff, followed by marketing, both of which were covered by funding in the first contract. In the first year of operation there were unexpected costs, such as legal costs related to tailoring the Homeshare agreement to the programme's requirements. While funding reduced for the second year of operation, Age Concern has managed to retain support for both those in matches and in the matching pool. Staff also mentioned possible future expenditure on the translation of communications, marketing materials and the sharing agreement for different ethnic groups, if the programme were to continue.

Homeshare for Her

The main risks that HSfH have identified are risks to members' safety, and organisational liability.

HSfH organisers have put in place various risk management procedures to protect members and the organisation at different stages of member's engagement with the programme. Participant autonomy is a key principle of the programme, and this is reflected in the approach to risk management.

When members register with the programme, their eligibility for the programme is verified. Checks are done to ensure that the individual is aged 18 or over, and that they are a woman. A few young women under 18 have applied to register. They have been referred to other organisations that support young people. Applicants over 17 but under 18 are kept on file and their registration is activated, if they meet other requirements, when they turn 18. In a few instances it has been unclear from the applicant's name whether they are a woman. Those individuals have been contacted by phone, or in person, to explain the programme's purpose and to ascertain whether they are a woman. To help organisers contact members easily if needed, members are required to provide at least two means of contact, such as an email and phone number.

There have been a few enquiries from women who need emergency accommodation or who have multiple and complex needs. The coordinator has responded to those women that HSfH is not suitable for women in crisis as it takes time for women to connect, get to know each other and do checks, such as reference checking. The coordinator has provided these women with contact details of alternative organisations for support.

Several protections ensure members can safely message one another through the website. The website provides a secure message system for members. Members are required to agree to terms and conditions governing their membership and use of the website. Only members can prepare and publish profiles, message other members and access website resources. Non-members can access the website to find out about the programme, the process to achieve a homeshare, read the Frequently Asked Questions and to contact the organisers. However, non-members cannot view profiles or contact members.

There is some monitoring and moderation of profiles. The coordinator checks that all offers of accommodation fit within the purpose of homesharing before publishing them on the website. In a few instances offers or seekers have been declined. For example, women have sought land to park a caravan on. This accommodation need was not accepted as within the spirit of homesharing.

Seekers can simply publish their own profiles when they register on the website. The organisers set up this process on the assumption that there was a higher risk to those offering accommodation and therefore their profile needed to be checked. This is a process the organisers acknowledge they need to consider further. Currently, to mitigate any issues with householders' or seekers' profiles the coordinator can temporarily take down a profile with a potential problem and then contact the member to address the issue. In the past, issues have included members inadvertently divulging sensitive or private information and photos about themselves or household members, or 'over-sharing' of information. The coordinator provides advice to members on how to craft profiles so that they convey appropriate information.

As noted above, members do not have to make their profile visible to other members. The organisers are aware that both invisible profiles and inactive profiles act as disincentives to women using the website and finding a compatible house mate. Consequently, the organisers have started to update the membership to those who are current and active members, by identifying and contacting anyone with no visible profile or very little information in their profile, or seemingly inactive profiles. This has led to some profiles being removed.

Through collecting information from those who have de-activated their own profiles, organisers have gained insights into the range of reasons for non-response to members' messages. These include: a lack of interest in requests received, the location offered is not suitable, the member has left the area, their contact details have changed, or they are no longer seeking or offering accommodation. Some women have found a house mate through another website or organisation. It is also possible that those without a visible profile who message other members with visible profiles do not receive a reply because there is no easily accessible information about them that other members can see, and this deters the visible member from responding.

The main strategy to manage risk is to provide information and guidance resources on the website to help members to make decisions and manage risks themselves. In that respect, the resources include information about how to set up a sharing agreement. This includes information about different types of agreements for sharing accommodation, such as the programme's recommended sharing agreement, a flatmate agreement, boarding agreement and tenancy agreement. Information is also provided on how to create a profile, how to relate to one's housemate and manage issues, and questions to ask prospective housemates. The resources provide information about how to ask for referees, police checks and credit checks. In addition, HSfH encourages prospective homesharers to meet in public places. The meet-ups are also used to convey information to members and enable prospective homesharers to meet one another in a neutral environment.

Because of different legal tenure arrangements, organisers encourage those offering accommodation who are not owner-occupiers (e.g., a renter, a person living in a dwelling owned by a family trust, or in a license-to-occupy dwelling) to seek advice about their rights and responsibilities in regard to establishing a homeshare.

Managing organisational liability has meant obtaining legal advice on setting up the trust and on other issues that have arisen from time to time. For example, organisers sought legal advice on the guidance they should provide those offering accommodation on whether they can ask a seeker for a deposit. HSfH is considering whether the programme should offer more support to members to make matches. That shift in emphasis is likely to require legal advice on organisational liability. Although scams have been identified as a potential risk, so far no problem with scammers has emerged. Communications that look like they might be from scammers are checked by the coordinator and dealt with accordingly.

6.5 Financial sustainability

The rapid review found that major challenges facing homeshare organisations are access to funding and achieving financial sustainability. Operating homeshare programmes is resource-intensive, especially when support is provided to participants over time and at multiple points. Internationally, it is rare for homeshare organisations to be financially self-sufficient. Organisations rely on public funding, philanthropic foundations and volunteers. Some organisations charge service fees to programme participants, but this is generally insufficient for financial sustainability.

Both Age Concern and HSfH organisers said that having sufficient resources is the key to programme sustainability.

Age Concern emphasised the need to have sufficient funding for staffing, identifying a minimum of two full-time staff to run a programme with all the necessary components of a facilitative homeshare model. Those components include dealing with enquires, promotional activities, assessment of applicants, matching, assistance with establishing the homeshare and on-going follow-up and support as needed. As well as staffing, the other significant budget item is promotion. This is critical for raising awareness of the programme and effectively promoting it to prospective participants.

HSfH has identified the availability of adequate and sustained programme funding as critical to maintaining the programme. Resources are needed for a coordinator (where most of the funding goes), maintaining and improving the website, and advertising and promotions.

7. Homeshare participant experiences

This section firstly explains how the interviews with participants were carried out and then reports on their experiences and views about the programmes. The key areas examined are:

- How participants found out about the programme.
- Main reasons for taking part in the programme.
- Views on information, resources and support received in the programme.
- Perceived benefits of homesharing.
- Suggestions for programme improvement.

7.1 The interview process

Two rounds of interviews were conducted with homeshare participants. The first round was conducted between September and December 2024. The second round was conducted in March and April 2025. Originally it was intended to find out about changes in experiences of matched homesharers as homeshares progressed. However, due to the small number of participants in homeshares and the changes in homesharing arrangements, a broader approach was taken, as outlined below.

Different approaches were used to access participants in each programme, due to the nature of the programmes. Homeshare Auckland made participants aware of the evaluation when they were accepted into the programme. Since the coordinator maintains contact with participants once a match is made, she was able to contact participants to inform them when evaluation interviews would occur. In contrast, HSfH does not maintain on-going contact with participants, which required a different approach for contacting prospective interviewees.

Across both programmes, a total of 21 people were interviewed. Seven people were interviewed twice and 14 people were interviewed once (totalling 28 interviews). Eleven people were in homeshares at the time of interviewing. Six were householders and five were sharers. Table 1 sets out the number of interviews in rounds one and two, and whether participants were in a homeshare or not.

Table 1: Number of interviews in rounds one and two (n=28)

Programme	Matched					Not matched			
	Householder		Sharer		Other	Householder		Seeker	
Interview	Round One	Round Two	Round One	Round Two	Round two	Round One	Round Two	Round One	Round Two
Homeshare Auckland	2	2	2	2	1	0	0	0	0
Homeshare for Her	1	3	1	2	0	3	2	5	2

In round one, interviews focused on motivations to participate in Homeshare, as well as early impressions and experiences of the programme. The round two interviews asked a range of questions, depending on whether the person had been interviewed before, and whether they were in a homeshare. Interview topics of participants are set out in Appendices 3 and 4.

Homeshare Auckland

Age Concern established four homeshares during the evaluation period. One homeowner had experienced two home shares while two homeowners had one homeshare.

Participants in a homesharing arrangement were advised that the evaluation interviews were underway by the coordinator, who then provided the interviewer with contact details for each person. Individuals were then contacted by the interviewer and given information about the evaluation and interview process. Their consent was obtained before any interview went ahead.

Two rounds of interviews were conducted. A total of nine interviews were done with seven people, all of whom were in a homeshare at the time of the interviews (three homeowners, three sharers and one family member). At least one person was interviewed from each of the four homeshares that were established by April 2025.

Four interviews were completed in round one (September-November 2024). Those interviews were with the two homeowners and their two sharers. Both homeowners were aged over 60. The two sharers were in their thirties. The interviews took place approximately 6-8 weeks after the homesharing started, and after the trial period had ended.

In round two (April 2025) the intention was to re-interview the first four homesharers and any new homesharers. Five interviews were completed. Two interviews were with two of the original participants, and three interviews were with participants in a new homeshare. The latter comprised the older homeowner, the sharer and a family member. Two people in a homeshare who were interviewed in round one were not available in round two. One of those declined to be interviewed as they had left the programme. The other person did not respond to interview requests.

Homeshare for Her

Two rounds of interviews were conducted. A total of 19 interviews were done with 14 people. Five were homesharers.

Because HSfH does not provide an on-going service once a match is made, there is no simple way of identifying those who have formed a homesharing arrangement through the programme. Consequently, accessing members was done in two ways for round one interviews (November-December 2024). First, an invitation to participate in an interview was sent out by the coordinator to those registered in the programme. As a result of that contact, a few individuals contacted the interviewer directly to be interviewed. Second, the interviewer attended a 'meet-up' of programme participants, staff and trustees. This enabled the interviewer to meet participants face-to-face and provide information about the evaluation. Eight women at the meet-up agreed to be interviewed.

Ten round one interviews were conducted with four householders (three homeowners and one renter), and six home seekers. Two of those 10 were in a homesharing arrangement, while the rest were looking for a compatible match. Five women were aged over 55 years (two householders and three home seekers).

In round two (March-April 2025), nine interviews were completed. Those included five women who were interviewed in round one. Seven of the nine were aged 55 and older (three householders and four home seekers). Five women were in homeshares (three householders and two sharers). One woman had established her own homeshare outside of the programme, however maintained contact with the programme. One seeker had been in two short-term homeshares through HSfH but at the time of the interview was not in a homeshare.

7.2 How participants found out about the programme

In both programmes, participants had found out about the programme through 'word of mouth' (friends, family), or through local media (print, radio and social media) and local organisations. These were the main ways in which participants became aware of the programme.

> In smaller communities' word of mouth is a big thing, if it has a bad rep, it's not going anywhere (sharer, HSfH).

The older homeowners in Homeshare Auckland explained that they found out about the programme through friends or family, or through Age Concern publicity about Homeshare. Sharers found out through family or volunteer networks. Two of the sharers were aware of homeshare programmes operating overseas.

Participants in HSfH found out about the programme through:

- Their workplace.

- Friends or family.
- Facebook (local pages).
- Local newspaper or radio.
- Local cinema advertising.
- A local organisation such as the Women's Centre, or Age Concern.
- Local library.
- Property manager, landlord, or other accommodation provider.
- The Homeshare for Her website.

7.3 Main reasons for taking part in the programme

Participants in both programmes noted reasons for taking part in homesharing, such as support, safety, financial benefit, companionship and social connections. However, the emphasis on those reasons differed somewhat for each programme.

Homeshare Auckland

The three Auckland homeowners said that their main reason for participating in homeshare was to receive support with household chores. Two wanted help with meals, and relied on their sharer to prepare one main meal per day and ensure food was available for other meals. One homeowner wanted help mainly in the garden and with heavy tasks. One homeowner was interested in companionship, although this was not given as a significant reason for their participation in homeshare.

> I don't look after myself very well. I don't cook. I don't want to go into a rest home (homeowner, Auckland).

Despite acknowledging a need for support, the homeowners also indicated a reluctance to ask for help. Sometimes they expressed the focus on support needs as something their family was concerned about. Two of the homeowners commented that their family wanted them to have someone in the house for safety reasons, particularly overnight. One homeowner commented that their family urged them to look at homeshare as a good way of staying in their home, which they had lived in for over 50 years.

Three sharers were interviewed. Two sharers were born overseas. Both saw homeshare as a way of connecting with New Zealanders and learning about the local way of life. Both liked the idea of sharing with an older person; one was familiar with that way of living, while the other worked with older people. The NZ-born sharer was used to living with older generations and preferred that type of living environment. All sharers commented on the family-like atmosphere that they expected of homeshare. Finally, all three sharers commented that homeshare helped them to save on housing and living costs. The financial advantage was, as one person noted, "a big drawcard" in their decision to take part in homeshare.

> I have an affinity with them, I prefer to interact with older adults (sharer, Auckland).
>
> That's the most important reason for choosing homeshare, it's better to stay with the older generation (sharer, Auckland).

The reason why the family member contacted the programme was due to concerns about their parent's ability to remain in the family home, which is what their parent wanted to do. The family agreed that their parent needed some help with meals and homeshare seemed to provide a cost-effective way of providing support. The family member had investigated private providers of home support services, but concluded that they seemed financially out of reach for the family.

Homeshare for Her

Among HSfH participants, there appeared to be two main reasons for taking part in the programme: to help with housing and living costs, and having a preference to share accommodation with a woman. These reasons were given by both householders and home seekers.

High housing costs were raised by both householders and seekers. Householders were living on their own, or in one instance, with children. They wanted to share their housing costs and saw homesharing as a convivial way of doing so.

> I financially need to share. I would love to live by myself but it's navigating Nelson's rental prices, it's considerably more expensive if you are on your own (seeker, HSfH).
>
> It's a very good thing. A lot of women are in my situation, there's a big need for it. It helps with housing costs and a hand around the house (householder, HSfH).

Some home seekers talked about their current unsatisfactory living arrangements, citing unaffordable rents, or living in temporary, short-term accommodation such as living with family, Air B'n'Bs or house sitting. A few mentioned abusive or exploitative housing experiences in the past. Seekers were looking for both affordable and secure accommodation.

Some seekers and householders were using accommodation sites other than the HSfH website, or had done so in the past, to find house mates. However, they emphasised they preferred to interact with the HSfH website, because they felt it was tailored to women's needs, and therefore it increased safety when searching for a house mate. They regarded the website as potentially delivering safe and secure living arrangements. A few with past experiences of domestic violence or abuse said they were wary of using general accommodation websites. Others commented that, as a woman living alone, they wanted control over who they were interacting with online, and the HSfH website gave them that sense of security.

> Provides women with safe spaces and connections within the community (sharer, HSfH).
>
> I like the website, it's very specifically just for women (seeker, HSfH).
>
> Flats can be constantly changing, you don't know who might come to live in a flat, not knowing who the other residents are, this could be a real problem for women who've had a bad experience in the past or been abused. Homeshare is much more predictable and stable, and you get to know one another. Overall it's a lovely idea, especially for women who would never consider a male flatmate (householder, HSfH).

A few householders were looking for help around the house, although this was not a major reason for joining HSfH. Help sought included help with gardening and lawn mowing, outdoor tasks, light housework and care of a pet.

Some householders and seekers were looking for companionship and to enjoy the social aspects of sharing accommodation, such as company in the evening or sharing common interests. However, while the social aspects of sharing were a priority for some, this was not important for all. A few explicitly commented that their preferred arrangement was for a private, self-contained space; they were not looking for friendship through sharing accommodation.

Two women interviewed were living outside of the area covered by HSfH. They had joined the programme in anticipation of a future move to Nelson-Tasman. Like those living locally, they emphasised a desire to share with another woman. They were seeking companionship through sharing, and to manage their housing and living costs.

> I really want to share with a woman, preferably someone who is working, with similar interests as me, and can help around the house (householder, HSfH).

7.4 Views on information, resources and support received in the programme

The two programmes offer different levels and types of resources, support and information. As noted above, Age Concern Auckland operates a facilitated model of homeshare, which offers a comprehensive vetting, matching and follow-up service. HSfH has more in common with the referral model, which provides a platform to enable those offering and seeking accommodation to establish a match for themselves.

Homeshare Auckland

The homeowners were very complimentary about the support they received from the programme. They felt that comprehensive efforts had been made to provide information, answer questions, identify their needs and to find a suitable match. Homeowners also commented on receiving prompt and supportive follow-up contact from the coordinator, which was appreciated. However, one homeowner considered that follow-up could have been more intensive in the first month of homesharing, to help in addressing some issues.

> [the coordinator] covered everything off that might have been of concern to me … she asked questions with a great deal of sensitivity, which gave me to confidence to continue (homeowner, Auckland).
>
> [the coordinator] is a very important part of it. They must be competent and kind. She makes sure it's safe (homeowner, Auckland).

The sharers also commented very positively on the support they received. They commented on receiving timely responses, comprehensive information, and regular catch-ups with the coordinator after the sharing arrangement started. Especially appreciated was the coordinator's effort to meet with them at a time and place that suited their work or study commitments.

Sharers were much more likely than homeowners to ask a range of questions. The main questions they asked were about:

- The homeowners' expectations about the types of assistance and the hours of assistance required.
- Whether the sharer was expected to help with any personal care, including monitoring of medication.
- Accommodation costs.
- The amenities in the house, such as the bedroom, bathroom arrangements, access to cooking facilities and storage.
- What should the sharer do if there is an emergency.

> The process has been really good … they are doing a good job (sharer, Auckland).
>
> Very helpful … information was easy to understand (sharer, Auckland).

The family member found that overall the homeshare programme was "a very good process". They appreciated the opportunity to meet with the coordinator, the quick responses throughout the process and the regular check-ins after the sharing was established.

Homeshare for Her

Interviewees' comments about information and support provided by HSfH to members focused on the website and the meet-ups.

The main service provided is the website. This includes a range of information resources for members to use, as noted in Section 5 above.

> Because it's for women, that was the main reason for listing [with HSfH] … a much better option because there is more security, more control, more ability to assess the suitability of applicants (householder, HSfH).

Interviewees regard the website as a safe space for women. In that respect, the requirement to register to use the website, and the oversight and content checking provided by the organisers is appreciated.

Although interviewees use the website for offering and searching for accommodation, and contacting other members, few interviewees reported using the website resources. Those who have used some resources, said they found that they were clear and provided the information sought. Responses to two members' surveys conducted by HSfH in September 2024 and March 2025, albeit with a small number of responses, indicated that some members do use the website resources, including the questions to ask when meeting a prospective house mate.

One reason for not using the resources appears to be that interviewees do not feel the need for such information. They feel confident in engaging with others, can find information through other sources, and have sufficient knowledge and experience of sharing with others, e.g., through previous flatting or boarding arrangements, to navigate negotiating and establishing a homeshare.

> I have developed my own sharing agreement (householder, HSfH).
>
> I am not sure I have used any [resources]. I may have glanced at them briefly. I just went straight to what [accommodation] was available and started contacting owners (seeker, HSfH).

A few interviewees were unaware of the range of information and resources provided on the website.

Interviewees reported some challenges, at least in the past, in using the website facilities to create and post profiles, and to message other members. Some said that using the platform was "complicated", "clunky" or "a bit frustrating" while others said they have encountered "glitches". Members' responses to two surveys conducted by HSfH also indicated a range of issues with the functionality of the website including difficulties messaging others, setting up a profile and navigating the website using a mobile phone. Several interviewees acknowledged that the organisers have made improvements in the functionality of the website. Some interviewees also said that when they asked for help with using the website, the response from organisers was generally rapid and helpful.

> The meeting was good to discuss a few different things, I really liked that (seeker, HSfH).
>
> It's key to have the additional meetings, I feel that [HSfH] are very approachable, friendly and committed to providing a service to keep us safe. This is especially important to me as an older person (seeker, HSfH).
>
> It took a long time to get traction. The café meetings helped with that. A lot better than just reading the profiles [on the website]. That might reflect my generation! (householder, HSfH).

In 2024 HSfH started the meet-ups, where members can meet one another face-to-face. These events have become popular among members. Those interviewees who have attended a meet-up gave positive feedback about being able to meet members and the organisers and find out more about the programme. Interviewees suggested some improvements to the meet-ups, mainly that a structured time in the event be set aside for attendees to ask questions of the organisers.

Although HSfH is not designed to provide on-going support and follow-up services for members, several interviewees commented that they feel supported and part of a community due to the way that HSfH is delivered. This is evidenced by the interviewees who are in a homeshare arrangement and have nevertheless maintained contact with HSfH. Their reasons for doing so, were because they supported the concept of homesharing for women, and wanted to use HSfH in future if they were seeking or offering accommodation.

7.5 Benefits of homesharing

Different benefits were identified by homeowners/householders and sharers. There were also slight differences according to age. Older homeowners/householders commented on the benefits of companionship and help around the house received from the sharer. Some but not all homeowners/householders considered that, as well as providing companionship and help, homesharing has financial benefits, in that it helped with housing and living expenses.

> There's a very homely feel about it. A home atmosphere … a secure, safe place … my needs have definitely been met (sharer, HSfH).
>
> This has been wonderful, I feel very blessed … there is plenty of space and privacy. We don't do a lot together, not in each other's pockets but it's nice to have someone to be there if needed … I'm paying a reasonable rent for a great home (sharer, HSfH).

The sharers and seekers identified housing security and affordability of accommodation and living expenses as benefits. Some identified companionship or social aspects of sharing as a benefit, however not everyone is interested in those aspects.

Homeshare Auckland

Overall, participants were positive about their experiences of homesharing.

Homeowners commented on the companionship received from the sharer, and help around the house as the main benefits. Two received help with meals and all received help with a small number of domestic tasks such as washing dishes or help with outdoor tasks. Nevertheless, there were some tasks that homeowners preferred to continue to do themselves in their own way. Sharers were not expected to do routine cleaning nor to provide care.

> Very, very helpful, I couldn't ask for more from anybody (homeowner, Auckland).
>
> I'm very happy, very good, quite happy about it (homeowner, Auckland).

Homeowners appreciated the presence of someone in the home, especially at night. One homeowner also liked having the sharer, a student, in the house during the day. One homeowner likened the sharing arrangement to a family relationship.

Sharers emphasised the companionship they received from the homeowner, their enjoyment of doing domestic tasks for their older housemate, and savings on housing and living costs.

There were some differences in homeowners' and sharers' perceptions of the success of the homeshare. Overall, sharers seemed to be more satisfied with their homeshare than homeowners. This may have been due to their expectations largely having been met. They were very satisfied with the financial advantages of homesharing and liked living with older people.

> I'm grateful for the opportunity … having a more meaningful living situation (sharer, Auckland).
>
> I don't have to worry about rent, power, water. There's also someone to talk to (sharer, Auckland).
>
> I would be very stressed if I was paying rent … This has been an opportunity, a great stepping stone … the ideal situation for me (sharer, Auckland).

Even though homeowners explained that for the most part they had found homesharing to be a positive experience, they commented on challenges around adjusting to living with someone else. Homeowners noted some tensions around:

- Food preferences, food costs and timing of meals.
- Communication between homeowner and sharer.
- Nature and extent of tasks expected of sharer.
- Amount of sharer's accommodation payment.
- The sharer's expectations of the dwelling amenity.

> I would have liked to resolve the meal issue earlier… I wanted to have more work done in the garden (homeowner, Auckland).
>
> I like plain Kiwi cooking …I'm paying more on food than I thought I would (homeowner, Auckland).

Homeshare for Her

Although most of those interviewed in HSfH were not homesharing, all those interviewed articulated the benefits they expect of homesharing. These include:

- Safety and security.
- Sharing with someone with similar interests and values.
- Social aspects, companionship.
- Ability to have a pet – finding rental accommodation that would allow a pet was described by one person as "very hard".
- Reduced accommodation and living costs.
- Help with household tasks.
- More housing options for women.

Four women, householders and seekers, said they could not see any benefit in homesharing for them as yet, because of the frustrations that they had experienced in finding a compatible person.

The five women in a homeshare arrangement were pleased with their situation. Four had found their homeshare through HSfH. The fifth had found a sharer through HSfH in 2024, however this did not work out due to incompatibilities. Since then she has found a boarder through another accommodation seeking platform, although she still maintains contact with HSfH.

The householders with sharers reported two main benefits: help with household chores and help with managing housing costs. Companionship was a consideration, but not identified as a significant benefit. The oldest householder had a younger sharer and reported that this was working out well.

All three householders with sharers commented that they see homesharing as a long-term option for themselves. One householder nearing retirement commented that the only thing that would potentially prevent her from homesharing in future was if she downsized to a smaller dwelling that was unsuitable for sharing with another person.

> Overall, it's a very very good thing. A lot of women are in my situation, there's a big need for it (householder, HSfH).
>
> It's working quite well for me. I will definitely look at taking on someone else if my sharer leaves (householder, HSfH).
>
> It's a great idea, the social aspect, the financial side. I don't see any downsides (householder, HSfH).

The older renter with a sharer raised the potential insecurity of renting, however noted that both the dwelling owner and property manager supported her decision to take on a sharer. So far, the rent has not been increased to reflect the additional financial support she receives through having someone else in the dwelling.

The two sharers in homesharing arrangements identified the following benefits: living in an ideal location, having comfortable and well-appointed living amenities in the accommodation, housing security and affordable accommodation.

7.6 Participant suggestions for improvements

Participants in both programmes were very positive about their experiences. Nevertheless, there were areas where they thought the respective programmes could be improved.

Participants in both programmes suggested some common areas for improvement:
- Homes offered should be assessed to ensure they are of a suitable condition and amenity for sharing. Participants noted conditions they thought were unsuitable, including: cold, damp, and dwelling amenities or space unsuitable for sharing.
- Programme staff conduct regular follow-ups, especially in the first few months of the homeshare.
- Increase publicity to raise more awareness about the programme.
- Monitoring of the programme to identify what is working and what is not.

Areas for improvement suggested that were specific to each programme are described below.

Homeshare Auckland

The main areas suggested for improvement were:
- Greater identification and specification of elements of the sharing agreement. Examples were: the sharer's financial contribution, arrangement for use of dwelling amenities, meal arrangements, sharer's support tasks and time commitments for undertaking such tasks.
- Formalising a review of the sharing agreement after a period (e.g., three months) so that changes agreed by both parties can be made as the homeshare progresses.
- Increased follow-up within the first few months of homeshare.
- Ensuring that the dwelling is suitable for homesharing.

Homeshare for Her

Most of the suggested improvements for HSfH focused on the functionality of the website, and its search and connecting facilities. In particular:

- Ensuring that profiles are current, and those no longer seeking or offering accommodation are removed.
- Encouraging members to respond to messages.
- Encouraging more members to make their profiles visible.
- Increasing the numbers of both householders and seekers.
- Improving consistency in the range and detail of content information provided by those offering accommodation and the types of accommodation seekers are looking for.
- Improving the ability to list and search by location. A few members noted that listers should be encouraged to be specific about the neighbourhood/suburb/location offered and wanted, i.e., not simply listing as Nelson or Tasman.
- A facility to suggest possible matches based on criteria provided by the householder or seeker.
- Notifications of new profiles.

> It would be helpful to see where the person wants to live. Many people need to be in Nelson, but one does not find out until they ask (householder, HSfH).
>
> People need to be clear when they are not available and if they have found someone to take their profile off. Some people do not reply and I find that rude (householder, HSfH).
>
> I think there is a lot of support provided, but many members are not active. I wonder why several of them that I contacted did not reply, they may have forgotten to remove their seeker's ad (householder, HSfH).

Other suggestions focused on increasing the ability of members to contact the organisers to obtain face-to-face information and advice. Suggestions included:

- Explanation of the process.
- Help with crafting a profile.
- Identification of the needs and preferences of those offering and seeking accommodation to help members make a good match.
- Holding more meet-up events.
- Establishing a periodic evaluation or survey for members to provide feedback.

> I would like some feedback on my profile, suggestions for improving it, how to make it more appealing, and what information would be good to include (householder, HSfH).
>
> There's some unacceptable things, like lifestyle behaviours … not a lot of room/space … I live in hope that a homeshare will work (seeker, HSfH).

Although the programme does not offer assessment and vetting of members, a few people suggested that the programme include vetting of householders offering accommodation, the condition of the accommodation being offered, and seekers.

Finally, a few people suggested expanding the types of accommodation listed, to include:

- A facility so that seekers could find someone to share a rental with.
- House-swap opportunities.
- Short-term stays and house sitting.

8. Summary of evaluation findings: Homeshare Auckland

Section 2 presented the parameters of the evaluation for each homeshare programme. This section uses those parameters to summarise overall findings for Homeshare Auckland.

For Homeshare Auckland, this report focuses on:

- Homeowners' and sharers' perspectives and experiences of Homeshare.
- Programme delivery processes and outcomes.
- Wellbeing outcomes for homeowners and sharers, particularly outcomes relating to:
    - Housing affordability
    - Tenure security
    - Personal safety
    - Social and intergenerational connection
    - Ability of the householder to age in place
- Key programme features critical for programme sustainability and transferability.

8.1 Homeowners' and sharers' perspectives and experiences

Section 7 presents the perspectives and experiences of seven people involved in homeshares established through the programme. They spoke very highly of the service provided by Age Concern. The coordinator's role was especially appreciated. Interviewees commented favourably on the support they received from Age Concern, noting the comprehensive information they received about the programme, the care taken to identify their needs, extensive efforts to find a suitable match and follow-up contact and support after the homeshare started.

The main areas suggested for improvement were:

- Greater identification and specification of elements of the sharing agreement.
- Review of the sharing agreement and ability to make changes agreed by both parties.
- Increased follow-up within the first few months of homeshare.
- Ensuring that the dwelling is suitable for homesharing.

8.2 Programme delivery processes and outcomes

Section 4.3 describes programme delivery processes. This programme is an example of the facilitated homeshare model. In line with that model, the programme's core components are; promotion and advertising, assessment of applicants, facilitating introductions between prospective homesharers, supporting homesharers to establish the sharing agreement, and on-going support after a sharing arrangement starts.

As noted earlier, by April 2025 the programme had achieved four homeshares. While this is a modest outcome, it must be considered a success, given that the programme was built from the ground up, and the intensive facilitated model takes time to establish enduring matches. Using measures of participant satisfaction and benefit, feedback from participants suggest that the programme is a success.

8.3 Wellbeing outcomes for homeowners and sharers

Wellbeing outcomes for homeowners and sharers were intended to be measured by Age Concern using the Personal Wellbeing Index. However, the few matches that have been achieved provide insufficient data for analysis.

Homesharers' perspectives of the benefits of homesharing they have experienced are discussed in Section 7.5. They were positive about their experiences of homesharing. Homeowners commented on companionship and receiving help around the house as the main benefits. Sharers commented on the companionship they received from the homeowner, their enjoyment of doing domestic tasks for their older housemate, and savings on housing and living costs. Two sharers born overseas commented that sharing helped them to form meaningful relationships with Kiwis. All three sharers said they liked living with older people, and in that respect homesharing was a good housing option for them.

There were some differences in homeowners' and sharers' perceptions of the success of the homeshare. Overall, sharers seemed to be more satisfied with their homeshare than homeowners. This may have been due to their expectations largely having been met. Even though homeowners said that for the most part they had found homesharing to be a positive experience, they also referred to challenges around adjusting to living with someone else. Homeowners noted some tensions around food, communicating with the sharer, the nature and extent of tasks expected of the sharer, the amount of sharer's accommodation payment, and the sharer's expectations of the dwelling amenity.

8.4 Programme features critical for sustainability and transferability

This evaluation points to the following programme features as critical for sustainability and transferability:

- The programme provider has legitimacy and trust in the community in which the homeshare programme operates.
- Having the dedicated role of coordinator is critical to the programme's smooth functioning and delivery.
- Promoting the programme is essential. The range of promotional activities are appropriate to the location and targeted to the different needs of homeowners and sharers.
- Community-based promotions and marketing work best. Age Concern has refined its promotions approaches to address geographical challenges, as reported in the Interim Report. Auckland's large area with its diverse geographical and cultural communities mitigates against a general promotions approach.
- Priority is given to growing the matching pool so that there are sufficient numbers of compatible matches to be made.
- Processes and procedures are fully recorded. This ensures consistent delivery that covers all necessary components of the programme, as well as providing training and support resources for staff.
- Understanding prospective homesharers' preferences, expectations and needs is essential for successful matching and the success of the homeshare.
- The matching process cannot be rushed. It is a personalised process focusing on the characteristics, needs and preferences of each person. Age Concern noted that matching is impacted by the number of people in the matching pool, participants' changing circumstances, and the increasing diversity of people enquiring about homesharing. The

latter has required increased efforts devoted to checking eligibility, vetting and assessment, and can result in people being declined.
- There are benefits in the provision of on-going support. Although a small number of homesharers were involved in the programme, they conveyed appreciation of support after the homeshare started. Nevertheless, one person commented that they would have liked more support during the first month.
- Building in a review of the homeshare agreement could improve on-going support.
- The organisation ensures support is provided for both the homeowner and the sharer, including after the homeshare ends. Age Concern, as an organisation for seniors, noted its priority is to support seniors, although it still has a responsibility to support sharers.
- Training resources are tailored to the homeshare programme's characteristics, groups served and the environment in which it operates. While there has been a strong focus on training and professional development, staff identified additional training resources that would benefit delivery.
- The standard of the dwelling and amenities provided to the sharer must be appropriate. Dwelling problems can affect the quality of the homesharing experience and jeopardise a match.
- The homeowner's family, if possible, should be involved in supporting the homeshare. Age Concern has developed relationships with family members and involved them in the homeshare.
- There is on-going review, learning and application of learning to adapt and improve operational processes as needed. Age Concern has strived to continually improve delivery.
- There are sufficient funds for programme provision.

9. Summary of evaluation findings: Homeshare for Her

With regard to Homeshare for Her, this report focuses on:
- The programme's characteristics, processes and activities.
- Whether the programme has been successfully delivered according to its overall goals and objectives.
- How well the programme's performance measures have been met, as set out in the provider contract.
- How cultural perspectives have been considered in development and implementation, and their contribution to its success.
- What can be learned to inform future policy and funding decisions, including programme viability and transferability.

9.1 Programme characteristics, processes and activities

HSfH is an example of a referral model of homeshare. As described in Section 5.3, its main processes and activities concern the provision of an interactive online platform that helps women seeking accommodation and women offering accommodation to find house mates. While there is coordinator oversight combined with some support, essentially the programme enables women to identify and establish a match by themselves. To that end, HSfH provides online information and guidance resources covering a range of topics about safely connecting with potential house mates, the sharing relationship, and how to make a sharing agreement.

HSfH does not provide on-going support or follow-up after the sharing arrangement is established.

As an adjunct to the website, HSfH holds regular meet-ups between householders and home seekers. These were established in the latter part of 2024 and are intended to be held quarterly. Meet-ups help promote the programme and enable women to meet potential house mates. They also act as an information forum where members can ask questions of the organisers.

HSfH uses a wide range of marketing and promotion methods to increase local awareness and attract members. HSfH also undertakes regular data collection about website use. In the past, HSfH engaged an external reviewer to recommend programme improvements. Surveys are used to monitor programme effectiveness by collecting information from members about their experiences of the programme. On-going refinements are made to improve website functionality.

9.2 Successful delivery according to goals and objectives

The goals and objectives of HSfH are concerned with helping women to establish a homesharing arrangement that offers affordable, safe and secure housing. HSfH is also about facilitating companionship, social connection, and mutual support among women through housing.

Information gathered through this evaluation suggests that the programme as delivered is generally meeting these goals and objectives. HSfH is promoted as a housing solution for women who are under-served in the housing market and who are unlikely to be eligible for social housing. As such, it targets a distinct group, women, and especially older women and women living alone. This group is often ignored, despite being part of a large and growing intermediate housing market of low-moderate income earners who find it increasingly difficult to access and retain affordable, safe and secure housing (Mitchell *et al.,* 2025). Although a small initiative, HSfH creates a new and different housing choice in a housing market with a significant affordability problem. The number of women registered with the programme by April 2025, around 286 women (200 seekers and 86 householders), suggests the programme is meeting a significant need.

Interviewed members reported that they have been attracted to the programme because of its emphasis on supporting women and providing an option to meet women's housing needs. Those interviewed members who have started a homesharing arrangement through HSfH were positive about the programme and identified benefits of homesharing. Both those in a sharing arrangement and those still looking to establish one identified help with managing housing costs as a key benefit of homesharing. Householders also identified help with household chores as a benefit, while seekers focused on affordability, housing safety and security, comfortable accommodation, and proximity to work and community amenities. Companionship was a consideration in choosing homesharing, but this was not identified by all householders or seekers.

HSfH organisers identified a programme goal of enabling better and more flexible use of housing stock for householders and seekers. The evaluation provides some modest evidence of improved use of housing stock through the accommodation offerings. For example, one interviewed householder's motivation for joining HSfH was that she lives in a large dwelling by herself and wanted to make accommodation available to women. Other accommodation offered includes two bedrooms in a home (as well as access to communal spaces), and a self-contained basement flat.

9.3 Meeting performance measures

The provider contract does not set out performance measures, but instead has two deliverables: to deliver the homeshare programme and to participate in the evaluation.

With regard to programme delivery, HSfH is required to:

- Promote the homeshare concept locally to raise awareness of innovative housing solutions.
- Promote the programme to recruit interested people to access online resources and register for the website.
- Facilitate the matching of interested participants and support through the homesharing process.

Overall, these tasks have been met, or largely met.

There has been extensive local promotion of HSfH through its website, online advertising, local and national radio and print media, local cinema advertising, billboards, brochures, stalls at local markets and events, and presentations to local organisations. Organisers have reported increases in registrations after publicity such as local newspaper coverage and interviews on local and national radio. The meet-ups appear to be a successful way of bringing together potential house mates and promoting the programme. Those interviewed were enthusiastic about the meet ups, considering them a valuable and important addition to the programme because they enable face-to-face contact between members and organisers.

Not all of the around 286 members are active on the website, although around 110 seekers and 28 householders have posted their profiles. A visible profile is the main way of connecting with others, and is therefore critical to successfully achieving a match. Also important is that members have confidence that profiles are current and active. However, interviewees noted issues with some members not replying to messages. Organisers are aware of both issues. They are encouraging more women to post their profiles, and updating the membership base.

Information from the interviews suggest that only some members access and use the resources. It seems that some women are confident in their ability to establish a homeshare and do not feel the need for the resources. The few interviewees who had used the resources found them helpful. However, it is noted that some interviewees are not aware of the website resources, although they are available as a tab on the website once women are registered and communicated in the registration welcome email.

It is difficult to know how effective the website platform is at facilitating matches, because organisers do not know when a homesharing arrangement is established. The organisers estimate that six homeshares have been established through the programme.

Some insights into the effectiveness of the platform in facilitating matches are provided by interviewees. They reported that the website is valued as a way of safely offering and seeking accommodation. It is seen as offering greater protection than other accommodation advertising websites, including by members who use other accommodation websites. However, a few interviewees said they felt frustrated or despondent over the lack of response or interest from other members to their profiles and messages. This suggests a challenge for HSfH in ensuring members remain engaged and feel positive about their experience.

Although follow-up and support after a homesharing match is made is not part of HSfH delivery, some support is provided to help members link up with others. The coordinator assesses eligibility, checks profiles and provides help to craft a profile. Support is also provided through the meet-ups. Several interviewees emphasised they appreciated the opportunity to meet with the organisers face-to-face and considered that these events give them greater trust in the programme. The organisers have considered whether offering more support and follow-up to members would increase the number of successful matches. However, at this stage there is no intent to offer more intensive support to facilitate matches or to provide follow-up once homeshares are established.

With regard to the second deliverable, participation in the evaluation, this required organisers to meet with the evaluator twice and to facilitate access with members so that participant interviews could be conducted by the evaluator. This deliverable has been exceeded. Between September 2024 and April 2025, six interviews were held with trustees and the coordinator involved in the delivery of HSfH. Trustees and the coordinator also provided data and information relating to website resources, membership data, and feedback from members.

Trustees and the coordinator ensured that information about the evaluation was circulated to members and that members were able to contact the evaluator directly so as to provide their views and experiences about the programme.

9.4 Consideration of cultural perspectives

The evaluation identified some focus on cultural perspectives. In particular the programme's intent is to include women of all ages, ethnicities and cultural backgrounds. The information resources include questions that seekers and householders can ask one another, which enable different cultural and ethnic practices and preferences to be discussed. Questions focus on expectations about household rules, food preferences, meals and cooking practices, and religious, spiritual or cultural practices.

9.5 Programme viability and transferability

The evaluation noted the following factors relevant to programme viability and transferability:

- The matching pool must be sufficiently large to enable compatible matches.
- The programme needs to be tailored to the needs and characteristics of the community.
- The programme should have a geographical focus. Seekers are interested in the location of accommodation offered, including its nearness to amenities and the seeker's networks.
- The provision of an interactive online platform as the main delivery mechanism has strengths and weaknesses. The web-based approach appears to work well for those served by the programme. Interviewees consider it a safe website. However, some interviewees commented on problems using some of the website features (e.g., messaging, searching, posting profiles) and difficulties in obtaining responses from other

members. The organisers are aware of these issues and working to improve the website experience.
- The programme has a diverse range of members. It has attracted members, not only from women living locally, but also from women looking to move to or return to the area. There is a wide age range among both householders and seekers. Such diversity can be an important advantage in growing the matching pool. However, the variations in generations, experiences of sharing housing, and housing needs, reveals a need to tailor advice, information and assistance to cater for those differences.
- The dwelling must be of a suitable standard for homesharing.
- Security of funding and diversity of funding streams is essential for on-going programme viability. HSfH has a heavy reliance on volunteer trustees to do much of the day-to-day work of running the programme. This has advantages in integrating the organisation into the community. However, this also raises the challenges of balancing governance responsibilities with everyday demands.

10. Conclusions and insights

The two homeshare programmes in this evaluation are examples of different homeshare models. Age Concern Auckland's homeshare programme is an example of the facilitated model while Homeshare for Her has the characteristics of the referral model of homeshare. The two programmes are structured differently and serve different groups. The Auckland programme is based in Age Concern and matches older homeowners/householders with (generally younger) sharers. HSfH is a stand-alone entity that addresses women's needs for safe, secure and affordable housing. Due to those differences, the two programmes have contrasting, but also shared experiences of delivering homeshare. This evaluation has focused on those commonalities to understand the implications and potential for operating homeshare programmes in New Zealand.

It is too early to come to definitive conclusions about the success of the programmes as they have been running for a relatively short time and have not reached full maturity. Due to funding reduction, Age Concern's programme has been down-scaled after two years of operation. In that time it designed and implemented a completely new programme and achieved four homeshares. As noted in the literature, programmes using the facilitated, intensive support model take considerable time and effort to secure a suitable match. HSfH has purpose-built an innovative programme that is in some respects still in development. As far as we are aware, this is the only type of homeshare programme in New Zealand based on an interactive website providing a contacting and matching service. HSfH organisers report a matching pool of around 286 women and an estimated six homeshares established through the programme.

Within that context, the evaluation's findings offer insights into what is needed to deliver a successful homeshare programme that meets the needs of the community it serves. Broadly, the two programmes are successful in terms of what they set out to do. Both have developed viable delivery processes. The programmes clearly address needs in their communities for a different type of housing solution. They offer both homeowners/householders and sharers stable and affordable housing, a safe environment, mutual support and social relationships.

The programmes share a strong commitment to continuous learning and improvement, as shown in their willingness to encourage feedback from participants and make changes to policies and procedures. Neither programme has sought to grow quickly, but instead to progress carefully, build on existing strengths and address identified issues. Both programmes have invested in promoting the concept of homeshare and their programmes within their communities, which is an important pre-condition for success.

Age Concern's homeshare programme has been built from scratch and over the time of operation has continued to make refinements as needed. Considerable effort has been put into documenting, reviewing and learning from matches achieved. This has led to programme improvements in appropriately targeting promotional and marketing activities with a community-based focus, growing the matching pool, and refining vetting, assessment and matching processes. Staff have developed a strong relationship with programme participants. Homeowners, sharers and a family member have given positive feedback about the programme.

Highlights for HSfH are achieving a good-sized matching pool, and extensive promotions and marketing that has helped to grow the matching pool and to increase familiarity with the homeshare concept within the community. Due to their promotional efforts, HSfH has even received requests from organisations outside of the region interested in establishing similar programmes. Since the website is the main delivery tool, HSfH has a strong focus on making improvements to website accessibility and functionality so that it meets users' needs. The meet-up events have been a successful addition to the core provision of the website. Members interviewed for the evaluation have commented favourably about the programme.

Irrespective of whether the facilitated or referral model is used, homesharing is a niche housing option that does not increase the numbers of affordable, secure dwellings. Nor is it designed to address urgent housing need. Nevertheless, homesharing can provide a suitable housing solution for some older people, either as householders or sharers. Homeshare's focus on relationships, mutual support and companionship distinguishes it from most other market and social housing options. Homeshare offers an opportunity for older householders living alone to connect meaningfully with others while staying in their homes for longer. The provision of the sharer's low-key support to the older householder can complement home-based care services, and even help reduce the need for higher level care. Typically, homesharing offers safe and secure housing, since the dwellings should meet certain condition, performance and suitability standards. Therefore, homesharing can provide more appropriate housing, especially for older people who would otherwise be renting. The Age Concern programme has clearly made a positive difference to the older homeowners' ability to strengthen social connections and remain safely in their homes. HSfH shows the potential for homesharing to provide a housing option for middle-aged and older women owner-occupiers and renters. Women in older age cohorts have been shown to be increasingly vulnerable to unsafe and unaffordable housing, including homelessness (Mitchell *et al.,* 2025).

Despite differences in focus and style of delivery, the experiences of the two programmes have revealed similar issues in relation to success and sustainability. As highlighted in Section 6, these issues are:

- The pool of both those offering and those seeking a homeshare must be sufficiently large to achieve matches.

- Focusing the programme and its promotion on geographical communities and communities of interest is most effective. In that way the programme can be responsive to local conditions, networks, and needs.
- The coordinator role is critical to programme success.
- There must be a strong focus on consolidation, reviewing, learning and making changes as required, so that the programme is relevant and fit-for-purpose.
- Risk identification and management strategies are needed.
- A range of success measures are used by the two programmes. While the usual measures of number of people in the pool and number of homeshares achieved are used, the programme providers consider that using other measures give a more comprehensive and nuanced understanding achievements. Those include: positive feedback from programme participants; effectiveness of programme policies and processes; and increase in local awareness of the programme.
- Adequate and predictable funding is needed for programme viability.

In conclusion, if homesharing is to be supported to develop in New Zealand, further work is needed to address uncertain funding, develop realistic and relevant success measures, and to build on documenting procedures, policy and operational guidance, and best practice guidelines designed for New Zealand conditions. Gaps in policy and operational guidance were detailed in the Interim Report.

References

Allen, N., Akter, H., Coan, S. & Mathieson, A. (2014*) Homeshare Scheme. Project Report*. Leeds Metropolitan University, Leeds (Unpublished). https://eprints.leedsbeckett.ac.uk/id/eprint/1711/

Bagnall, A-M. (2020) *Final Report: Leeds Homeshare Local Evaluation*. Project Report. Leeds

Beckett University. https://eprints.leedsbeckett.ac.uk/id/eprint/7231/

Boyd-Noel, S. (1994) *Canadian Homesharing matching agencies: Five year follow-up*. Simon Fraser University. Burnaby, B.C. https://core.ac.uk/download/pdf/56366244.pdf

Carstein, B. (2003). *Economic Evaluation of Homeshare Victoria*. https://homeshare.org/wp-content/uploads/2012/04/Homeshare_Victoria_Economic_Evaluation.pdf

Coffey, J. (2010). *An Evaluation of Homeshare Pilot Programmes in West Sussex, Oxfordshire and Wiltshire.* School of Health and Social Care, Oxford Brookes University. https://radar.brookes.ac.uk/radar/items/f1de7010-faf5-1783-b9bb-a3fb5ff44dea/1/

Doyle, V. (1989) *Homesharing Match-up Agencies for Seniors: A Literature Review*. Simon Fraser University. Burnaby, B.C. https://summit.sfu.ca/_flysystem/fedora/sfu_migrate/522/GRC_003.pdf

Gutman, G. M., Doyle, V., Melliship, K., & Baldwin, P. (1989). *Survey of Canadian homesharing agencies serving the elderly*. Vancouver, Canada: Gerontology Research Centre, Simon Fraser University and MacLaren Plansearch Ltd.

Hawking, T., Campbell, R. & Campbell, B. (2019). *Homeshare: Getting on Together*. A Submission to the Royal Commission into Aged Care Quality and Safety. HANZA, The Australia Institute.

Head, H. and Symanowicz, S.Z. (1997). *A Vermonter's Guide to Homesharing.* Project Home. https://homeshare.org/wp-content/uploads/DIY-Homeshare.pdf

Homeshare Australia and New Zealand Alliance (HANZA) (2022). *Homesharing Planning and Operational Manual.* HANZA.

Homeshare International Research Advisory Group (2016). *Business Models for Homeshare Programmes.* Fact Sheet No.1 https://www.homeshare.org/wp-content/uploads/HIRAG-Fact-sheet-1-Business-models-2016.pdf

Homeshare UK (2018). *The Homeshare Partnership Programme Evaluation: May 2018*. https://homeshareuk.org/wp-content/uploads/2018/05/Homeshare-executive-summary-evaluation-report.pdf

Hughson, E.A. (2013). *CLBC Homeshare Service Review.* Calgary: Hughson & Brown.

Independent Advisory Council to the NDIS (2018). *Pathway to contemporary options of housing and support. https://individualisedliving.com.au/wp-content/uploads/sites/3/2021/05/IAC-report-2018-Pathway-to-innovative-and-contemporary-options-of-housing-and-*

support_AUS.pdf#:~:text=This%20report%20explores%20how%20the%20NDIS%20can%20promote,outlined%20in%20the%20Objects%20of%20the%20NDIS%20Act.

Jaffe, D. J., & Wellin, C. (1989). The nature of problematic matches: The case of Share-a-Home of Milwaukee. In Jaffe, D. J. (Ed.), *Shared housing for the elderly* (pp. 181–193). New York: Greenwood Press.https://static1.squarespace.com/static/5ee7d81bb40a0932bbf44918/t/5ef55cc614295c064b1b1ad1/1593138376035/Jaffe+%26+Wellin1989.+Problematic+Homesharing+Matches.pdf

Johnstone, W. (1997) *Key Factors in the Survival of Non-profit Homesharing Programs Serving Seniors in Canada*. [Masters thesis, Simon Fraser University.] SFU.ca Library Catalogue https://summit.sfu.ca/_flysystem/fedora/sfu_migrate/9155/WendyJohnstone2001thesis_1.pdf

Macmillan, T., Gallagher, J., Ronca, M., Bidey, T., & Rembiszewski, R. (2018). *Evaluation of the Homeshare pilots. Final report.* Report prepared by Traverse for SCIE. https://www.housinglin.org.uk/_assets/Resources/Housing/OtherOrganisation/Homeshare-Evaluation-Report.pdf

Magid, K. H., Galenbeck, E., Hazelwood, J., Shanbhag, P., Joucovsky, A. L., Levy, C. R., & Lum, H. D. (2022). Sharing Space to Age in Community: A Mixed-Methods Study of Homeshare Organizations. *Journal of Aging & Social Policy*, *34*(5), 809–837. https://doi.org/10.1080/08959420.2022.2029266

Martínez, L., Mirza, R., Austen, A., Hsieh, J., Klinger, C., Kuah, M., & Liu, A., Mcdonald, L., Mohsin, R., Pang, C., Rajewski, J., Salomons, T., & Sheikh, I. (2020). More Than Just a Room: A Scoping Review of the Impact of Homesharing for Older Adults. *Innovation in Aging. 4.* 10.1093/geroni/igaa011.

Mitchell, I. James, B., Cram, F., & Glaudel, C. (2025). *Housing solutions for low to moderate income households.* Research report for BRANZ. IN PRESS

Reid, S., Mendez Sayer, E., Wilson, M., Gallagher, J., & Corlet Walker, C. (2016). *Evaluation of the Homeshare pilots programme. Scoping phase report.* Report prepared by OPM for SCIE/Homeshare Partnership. https://homeshareuk.org/hs-resource-library/homeshare-partner-programme-proposal-for-a-scoping-study/

Shared Lives Plus (2015) *Homeshare Report: A Snapshot of the Homeshare Market in the UK.* https://homeshareuk.org/wp-content/uploads/2016/09/sl-homeshare-report-may15.pdf

Tinkler, T. Walker, L. & Schumann, M.J. (2019) Improving the Lives of San Diego County Seniors Through Stable Housing: An Evaluation of ElderHelp's HomeShare Program. *Seniors. 7.* https://digital.sandiego.edu/npi-seniors/7

U.S. Department of Housing and Urban Development (2021). *Assessments of Shared Housing in the United States*. https://www.huduser.gov/portal/sites/default/files/pdf/Insights-of-Housing.pdf

Webb, T. (n.d.) *Annapolis Valley Homeshare Toolkit*. Women's Place Resource Centre, Nova Scotia, Canada https://www.transitionbay.ca/wp-content/uploads/2023/11/Toolkit-AV-homeSHARE.pdf

Appendix 1: Topics for discussion with Age Concern staff

Stage 2 Evaluation

General update about the homeshares.

Growing the pool – how is this being achieved? What have you learned?

- How is marketing going? What channels are used?

How is the matching process going?

- What are you doing to ensure successful matches?
- What preparation is needed?
- What information do the householder and sharer need – have you changed this information?
- What things really help?
- What factors/issues would make or break a match?

Managing changes in circumstances

- What sorts of changes have happened?
- How are you managing it?

Resources needed to deliver the programme:

- Have there been changes in resourcing – what are those?
- Staff resources: What staff skills and experience have been most useful so far? What skill gaps or training improvements can you suggest?
- Funding sources.
- What resources are needed to sustain the Homeshare programme?

What has really helped to get the programme off the ground?

What issues or risks have you encountered in delivery, and how did you resolve those?

What is done to assess whether the dwelling/property is suitable for a sharer? Any issues with housing offered?

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

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

Looking back, is there anything you have done differently? What can be learned from AC's experience of running a Homeshare programme?

Appendix 2: Topics for discussion with Homeshare for Her

Stage 2 Evaluation

What is HSfH trying to achieve and for whom? What are the goals and objectives?

How did you determine that this programme is needed? What is the evidence underpinning HSfH? How did you establish there is a need?

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?

Number of members, number of matches.

How and where is funding obtained?

How does HSfH work? Describe key programme components.

What sort of support is provided to homeshare participants?

Have you had to change any initial intentions or programme characteristics?

Who delivers the programme? Governance, staff and volunteers

Infrastructure – is there a physical office? Is it stand-alone or attached to another organisation? Why were those choices made?

How do you measure success?

What were the issues or challenges in establishing HSfH?

What are the issues or challenges in operating HSfH?

What are the risks of running the programme? How are they managed?

What are the organisational actions that contribute to making successful matches?

Do you have any improvements planned, or improvements you would like to do?

What is needed to sustain a homeshare programme?

Appendix 3: Interview topics for the homeowner/householder

Why did you decide to take part in the homeshare programme?

How did you find out about the programme?

What sort of information did you receive about the programme? What did you like/not like about the information? Did it help you?

Did you talk about homesharing 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 (if applicable)?

What did you think about the matching process? How many prospective sharers have 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 sharer would you like?

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

What do you think about the support provided to you by [programme provider]?

Your suggestions for improving the programme.

For those in a homeshare

What support is provided by the sharer?

What are the upsides of homesharing? Benefits and positive aspects.

And downsides of homesharing? Things that you have not liked.

What do you think about the support provided to you by [programme provider]?

Has homesharing met your expectations, and how satisfied are you with the programme?

Appendix 4: Interview topics for the seeker/sharer

What is your housing/living situation at the moment?

Why did you decide to take part in the homeshare programme?

How did you find out about the programme?

What were your initial expectations of the programme?

What do you think would be the benefits of homesharing for you?

What sort of information did you receive about the programme? What did you like/not like about the information? Did it help you?

(HSfH members only) What do you think about the Homeshare for Her website, online matching platform and resources?

What is it like going through the homeshare process? Application, assessment, matching, introductions (as applicable).

What do you think about the support provided to you by [programme provider]?

How many prospective householder/homeowners have you met?

What sort of practical support or help would you like to provide to the householder/homeowner?

Your suggestions for improving the programme.

For those in a homeshare

What help and support do you provide to the householder/homeowner?

What are the upsides of homesharing? Benefits and positive aspects.

And downsides of homesharing? Things that you have not liked.

What do you think about the support provided to you by [programme provider]?

Has homesharing met your expectations, and how satisfied are you with the programme?

Thoughts about living intergenerationally (if applicable).

Appendix 5: Rapid Literature Review

We undertook a rapid review of selected literature to explore five questions:

- How is success measured?
- How is a sufficiently large matching pool achieved and maintained so that matches can be made?
- How is a successful match achieved – what programme processes /actions contribute to a successful match?
- How are risks (to the programme and participants) identified and managed?
- How is the financial sustainability of the programme achieved?

Measuring success

Funders and providers wish to identify whether a homeshare programme is successful. Participants also want to take part in a programme that is successful.

Common measures identified in the literature are the number of matches, the length of time taken to secure a match, and the duration of matches. However, evaluations caution about using those as the only or primary measures of success.

The length of time taken to secure a match is a measure based on the assumption of the shorter the time taken to establish a match, the greater the number of matches and therefore the more successful a programme will be. However, the number of matches and length of time taken to secure a match have been criticised as measures of success, as typically the intensive support model takes considerable time and effort to secure a match that is right for both parties and which will endure. Magid *et al.* (2022) surveyed 23 homeshare organisations in the United States and found that the time taken to match a householder with a sharer ranged from 1-2 weeks to considerably more than 8 weeks. Sometimes the matching process does not lead to a match. The long time taken to establish matches often leads to reduced funding support, due to a small number of matches being seen as lack of success. Loss of funding in turn can exacerbate challenges in achieving matches (Bagnall, 2020).

Duration of the sharing arrangement is used as a measure of success, with a long time signalling success. However duration of a homeshare must reflect the actual needs and preferences of participants. A long sharing arrangement is not a useful measure of success if it does not fit the needs of participants (Webb, n.d.). Evaluations report a wide range in sharing duration, from a few weeks to over two years (Carstein, 2003; Coffey, 2010; Webb, n.d.). Some matches have a naturally short lifespan, reflecting life transitions and changing needs of those involved (Jaffe & Wellin, 1989; Doyle, 1989). The U.S. Department of Housing and Urban Development (2021) report homesharing arrangements typically last two-to-three years. However, that report also notes some organisations operate with month-by-month sharing arrangements, with participants typically remaining for 1.5 years.

While number and duration of matches can be used to measure success, they should not be the only measures used. Other measures used in homeshare programmes include participant satisfaction with the homeshare programme, health and financial benefits, reduced social isolation and quality of life improvements (Bagnall, 2020; Coffey, 2010; Macmillan *et al.,* 2018; Webb, n.d.). Carstein (2003) used a cost-benefit analysis to estimate that an Australian homeshare programme generated significant benefits of over $A600,000 in the first year for the householder. The net benefits in the first year to sharers was over $A150,000.

Achieving and maintaining the matching pool

Homeshare programme evaluations over the last 40 years have noted that creating a pool of homeowners/householders and prospective sharers that is big enough to achieve matches is challenging. Research on homesharing programmes in the 1980s suggested that a pool of 60 to 100 applicants, at least half of them homeowners, is necessary to generate one match. It was found that established programmes may only match 25% to 30% of clients. One study of 35 homeshare providers found an average match rate of 38% (Doyle, 1989). A recent survey of 23 homeshare programmes (Magid *et al.*, 2022) cited one provider that estimated that almost 20 seekers for each homeshare offered are needed to achieve a compatible match. That noted that the volatility of sharer numbers can lead to a reduced pool and thus is a challenge to achieving matches.

Evaluations have consistently found that the critical way to grow and maintain the matching pool is to broaden the reach of the programme (Bagnall, 2020; Boyd-Noel 1994; Coffey, 2010; Homeshare UK, 2018; Martínez *et al.,* 2020; Shared Lives Plus, 2015; Webb, n.d.). This can be done by:

- Spending time socialising the homeshare concept in the community so that the public becomes familiar with the concept.
- Engaging directly with professionals and organisations working with older people, to explain homeshare to them and seek effective and appropriate referrals.
- Widening the demographic, of both homeowners and home seekers e.g., including householders under 65 with a chronic illness or disability needing a sharer.

Certain marketing and promotional methods enable pool growth. Of primary importance is tailoring marketing and promotions to specific geographical areas and communities. An evaluation of programmes in three English counties found that programmes operating across a wide geographical area or county-wide made the least matches. That evaluation recommended focusing on a small area and on locations with good transport routes (Coffey, 2010).

Paying attention to demographics is also important (Boyd-Noel 1994; Homeshare UK, 2018; Shared Lives Plus, 2015). One evaluation observed that a common mistake is to assume that younger sharers should be targeted. This evaluation found the ages of matched sharers and homeowners were often similar, or less than a generation apart (Bagnall, 2020). Another evaluation recommended focusing on areas with an over-representation of older people, lots of people looking for accommodation, and little affordable accommodation (Coffey, 2010).

Using a range of marketing channels to reach both prospective householders and sharers was found to be successful. For example, it has been found that distributing promotional material to organisations and community venues used by older people is effective (Head & Symanowicz, 1997; Shared Lives Plus 2015; Johnstone, 1997; Webb, n.d).

Challenging negative perceptions and addressing perceived risks and uncertainties can help to encourage homesharing applicants. Studies note the need to address applicants' anxieties about lack of compatibility between homeowner and sharer, being taken advantage of, and the arrangement breaking down. Homeowners have concerns about sharing, including loss of independence and loss of privacy. Sharers express concerns about not feeling at home or restrictive house rules (Allen *et al.,* 2014; Doyle, 1989; Gutman *et al.,* 1989; Martínez *et al.,* 2020; Webb n.d.).

Some studies describe how providers promote positive perceptions of homesharing to drive interest in their programme. This can be done by demonstrating good practices and the benefits and positive experiences for participants (Shared Lives Plus, 2015; Webb, n.d.). Other studies note that organisations with staff members with connections to different ethnic communities and who are bi- or multi-lingual find it easier to expand the pool of applicants, and to reduce misconceptions and barriers to accessing homesharing services (Boyd-Noel 1994; Gutman *et al.,* 1989).

Achieving a successful match

Ensuring that a homeshare arrangement is successful for both householder and sharer requires organisational resources and delivery practices appropriate to the programme's aims and the needs of participants.

Overall, the provider must portray homesharing accurately, explaining what homesharing is, and what it is not (Doyle, 1989; Gutman et al., 1989; Hughson, 2013; Webb n.d.). Homesharing is based on the principles of "connection, reciprocity and mutual benefit" (HANZA, 2022:8). It is a relationship-based programme and therefore neither a substitute for emergency accommodation nor for aged care.

Some research has warned against using the term 'placement' to describe homesharing, since 'placement' can have the connotation of lack of choice of housing and house mates, whereas homesharing is about choice of both housing and house mate, as well as supporting the older person's independence and fostering mutual support (Hughson, 2013). This point is also forcefully made in respect of disabled householders and sharers (Independent Advisory Council to the NDIS, 2018).

Research has identified programme components that help to achieve a successful match:

- A dedicated coordinator role. Bagnall (2020) considers the coordinator role as the most important enabling factor.
- Clear programme procedures that are understood and followed by staff (Hughson, 2013).
- Appropriate training for staff so they can obtain the comprehensive information needed from applicants to identify needs, preferences and expectations required to achieve safe and successful matches (Hughson, 2013).
- Explicit eligibility criteria for householders and sharers that cover both individual circumstances/needs and dwelling standards (e.g., safety, privacy and condition).
- Strong preliminary vetting processes that engender a feeling of trust and safety for both householders and sharers (Bagnall, 2020; Magid *et al.,* 2022).
- Matching processes that identify householder and sharer expectations, and enable potentially compatible people to be matched (Boyd-Noel 1994; Magid *et al.,* 2022; Martínez *et al.,* 2020).
- The formal sharing agreement must be easily understood and comprehensive, covering areas such as participants' rights, responsibilities and boundaries, the support expected to be given, the share of household expenses from the sharer and the nature of

accommodation offered (Carstein, 2003; Coffey 2010; Webb, n.d.). Jaffe & Wellin (1989) found that detailed specification of exchanges in sharing agreements was associated with more successful matches.

  - "Appropriate and not intrusive" support for homesharing participants (Bagnall, 2020:41), particularly ongoing monitoring and timely conflict resolution if needed (Boyd-Noel 1994; Martínez *et al.,* 2020; Shared Lives Plus, 2015). The level and timing of support appears to be important, with more support potentially needed during the first few months (Shared Lives Plus, 2015; Webb n.d.).

- Good communication between programme staff and homesharers is key to achieving successful matches (Macmillan *et al.,* 2018). Hughson (2013) argues that homeshare programmes are highly personalised, being tailored to individual needs. Accordingly, the first contact with the homeshare organisation must be welcoming and focused on the individual.
- Webb (n.d.) emphasises the pivotal role of the programme provider in fostering good communication between homesharers and suggests that participants receive basic communication and conflict resolution training before matching. Several studies point to participants' ability to work through differences and flexibility in negotiating shared aspects of daily living as necessary for a successful match (Boyd-Noel 1994; Homeshare UK, 2018. Webb, n.d.).
- Ensure participants have access to appropriate supports outside of the programme, if needed, such as in-home care, counselling, mediation, financial support, health services or community services (Shared Lives Plus, 2015; Webb n.d).
- Facilitate involvement of the householder's family and friends to support the sharing agreement (Shared Lives Plus, 2015).

Just as the research highlights factors that can make a match, there are also organisational and participant factors that can break a match. The organisational factors that can contribute to a match failure include:

- Inadequate vetting and matching processes, including unrealistic assessment of participants' needs.
- An unclear or ambiguous sharing agreement.
- Poor communication between the programme provider and homesharers (Jaffe & Wellin, 1989).
- Inadequate staff resources. One study identified that having less that one FTE staff member constrains the number of matches able to be made, because less time is spent on advertising, marketing, building relationships with other organisations and matching activities (Magid *et al.,* 2022).
- Little or no follow-up support once a match is made.

Certain participant behaviours can lead to a match breaking down, including communication difficulties, failure to disclose health/mental health issues, unrealistic expectations of sharing, different perceptions of the sharing agreement and non-fulfilment of responsibilities outlined in the sharing agreement. Studies highlight participants' honesty about their needs, preferences and expectations as important for successful matches (Boyd-Noel 1994; Homeshare UK, 2018; Martínez et al., 2020; Webb, n.d.). The way that homesharers act towards each other in maintaining privacy and personal space, and how they engage in shared activities can also affect the success of homesharing (Boyd-Noel 1994; Martínez *et al.,* 2020;

Homeshare UK, 2018). Incompatible lifestyles contribute to a match breaking down (Boyd-Noel 1994; Jaffe & Wellin, 1989; Martínez *et al.,* 2020). For example, cooking and housework problems are among the issues least likely to be resolved, even more so than personality issues (Boyd-Noel, 1994).

Problems of coercion, abuse and power imbalances between participants can result in a failed homeshare, although it has been found that the incidence of abuse in homesharing arrangements is very low (Webb, n.d.). The potential for abuse is increased if unsatisfactory matches are made and there is no provision for rapid termination of a sharing agreement (Martínez *et al.,* 2020).

Finally, family interference, including excessive family demands on the sharer, can break a match (Boyd-Noel 1994; Carstein, 2003; Hughson, 2013).

Coffey (2010) suggests the reasons given by householders and sharers who have taken part in a trial match which does not progress to homesharing be learned from, to prevent future trial failures.

Risk management

The main types of risk for homesharing programmes identified in the literature are:

- Lack of public familiarity with homesharing including scepticism or negative attitudes towards homesharing.
- Participant's anti-social or abusive behaviour.
- Change in participants' circumstances, which is often the reason a homeshare ends (Carstein, 2003). This can involve study or job changes for sharers, or a health crisis for the older householder.

Successful risk management actions identified in the literature include (Bagnall, 2020; Hughson, 2013; Reid *et al.,* 2016; Webb, n.d.):

- Obtain legal advice on organisational policies and procedures.
- Organisational insurance that is appropriate to the homesharing service.
- Risk assessment training for staff.
- Operating a risk register that is regularly reviewed.
- Providing comprehensive information to applicants about Homeshare principles and participants' roles, responsibilities and boundaries.
- Due diligence on assessing applicants through rigorous screening, interviewing and use of reference checks.
- Having explicit eligibility criteria. Most homeshare organisations exclude applicants (both owner and sharer) with a history of mental health, alcohol or drug issues, or criminal convictions. Some organisations emphasise there is not a blanket exclusion, but they assess applicants on a case-by-case basis (Magid *et al.,* 2022).
- Assessment of the suitability of the householder's home and excluding applicants with unsuitable housing.
- Taking the time needed to make a compatible match.
- Regular check-ins with homesharers to identify any potential risks and intervention when issues emerge or a sharing arrangement is not working.
- A plan for managing any abuse.

- Provision of a complaints process.

Fostering participant autonomy is noted as a means of reducing organisational liability. This goes beyond ensuring informed consent, to participants making decisions at all stages, and taking responsibility for their decisions. Webb (n.d) notes organisations' support for courses for participants and gives an example of one homeshare provider that offers a training programme of 10-12 hours for homeowners.

Webb (n.d.) suggests that for homeshares without the on-going oversight of an organisation, that participants minimise their risks by using a police check, and seek advice from their insurance provider and from any government agency through which they receive income support to make sure there are no unexpected implications from taking part in a homeshare.

Financial sustainability

The main challenges facing homeshare organisations, most of which are not-for-profits, are access to funding and achieving financial sustainability (Bagnall, 2020; Boyd-Noel, 1994, Hawking *et al.,* 2019; Macmillan *et al.,* 2018; Magid *et al*., 2022). Operating homeshare programmes is resource-intensive, especially when support is provided to participants over time and at multiple points (U.S. Department of Housing and Urban Development, 2021).

Only four of the 48 organisations surveyed by Homeshare International in 11 countries were found to be financially self-sufficient (Homeshare International Research Advisory Group, 2016). There is a critical reliance on public funding (through central or local government), supported by private philanthropic foundations and donors (Bagnall, 2020; Boyd-Noel, 1994; Carstein, 2003). Many organisations also rely on volunteers as well as paid staff (Homeshare International Research Advisory Group, 2016). Loss of core funding can result in closure (Webb n.d.)

Fee structures are part of the business model for homeshare programmes, although over half (57.8%) of the organisations surveyed by Homeshare International offer a free homeshare service. Others charge fees for householders and/or sharers (Homeshare International Research Advisory Group, 2016).

In their evaluation of five homeshare programmes in the UK, Macmillan *et al.* (2018) used the Lloyds Bank financial modelling tool to understand the number of fee-paying matches necessary for each programme to achieve and sustain financial sustainability, or to break even. They found that the number of matches required in the first year ranged from just over 6 to 14, depending on programme operating costs and fee structure. Carstein (2003) also provides estimates of fees to charge householders and sharers in an evaluation of an Australian homeshare programme.

Although charging a fee for service is a key element of financial sustainability for many homeshare programmes, fees have been identified as a deterrent to some applicants (Allen *et al.,* 2014; Bagnall, 2020). Consequently, evaluations recommend that when a fee is charged, the reasons for fee charging, and benefits or services received through the programme need to be clearly explained to applicants.