

# A Letter from HOME

## THE YEAR IN REVIEW

What a year this has been! Our 30th Anniversary party was a great celebration of how far we have come (see page 2). With increased funding from the State of Vermont we have added staff for the first time in a decade. This increased staffing level has allowed us to serve more people and to take on some special projects we would not have been able to do otherwise. This year we also started a strategic planning process to look at what our plans should be for the future. Many thanks to everyone who has volunteered, donated and worked to make this one of the strongest homesharing organizations in the country! Onward.

### Election to International Board

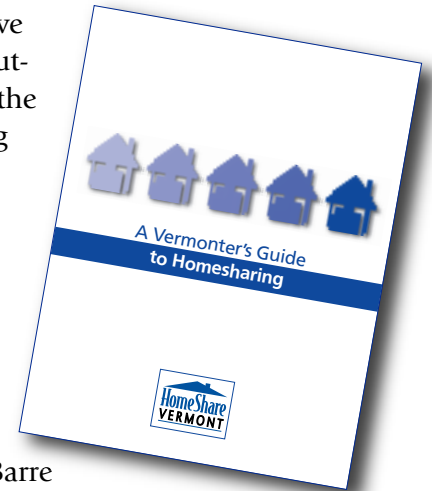
In April, Kirby Dunn was elected to the Board of Trustees of HomeShare International. Homeshare International was founded in London, UK, in 1999 to forge links between the programs around the globe and to stimulate the development of new programs. "I am honored to be part of this wonderful organization," said Dunn. HomeShare International has strong ties to Vermont as the founder, Nan Maitland, noted when she came to the US Homesharing Conference in Burlington in 2006 and credited the international movement with its birth right here in Vermont.



Board members Estelle Deane and Kelly Deforge at HomeShare Vermont's Strategic Planning meeting in June.

### New Guidebook Available to All Vermonters

HomeShare Vermont just published a do-it-yourself guidebook to help people find a homesharer to live with them if they are outside the service area of the state's two homesharing programs. HomeShare Vermont serves Chittenden, Grand Isle and Addison counties and some adjoining towns. Home Share Now, established in 2003, is a non-profit organization based in Barre that serves Washington, Lamoille and Orange counties and some adjoining towns. While the two programs serve over 50% of the state's population, in other parts of the state people don't have access to a comprehensive screening and matching service. The guidebook is one way we can cost effectively help people find a great homesharing match on their own.



The new guidebook walks people through the entire process from placing an ad to interviewing techniques to developing a match agreement. The guidebook also offers suggestions on how to prevent problems before they occur. This guidebook replaces a previous edition done in 1997.

The guidebook, *A Vermonter's Guide to Homesharing*, is now available to download on the HomeShare Vermont website at [www.HomeShareVermont.org](http://www.HomeShareVermont.org). The Guidebook was funded in part by a generous grant from AARP-Vermont. 🏠



HomeShare Vermont is a non-profit agency that enables elders and persons with disabilities to remain independently in their homes by bringing them together with people seeking affordable housing and/or caregiving opportunities.



*A Letter from HOME*  
ANNUAL REPORT FY 13

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## 30th Anniversary Celebration a Success!

In October 2012, HomeShare Vermont hosted "Thirty & Thriving," an event to celebrate 30 years of homesharing and caregiving in the Champlain Valley. The evening was complete with delicious food from local restaurants, lively storytelling by Willem Lange and a raffle drawing for a beautiful Vermont Folk Rocker. Thank you to all who attended and helped to make the celebration a success!

HomeShare Vermont would like to extend thanks to all of our sponsors and donors including those listed below.

To mark our 30th anniversary, Homeshare Vermont also launched a multi-year campaign to raise \$300,000 to support our homesharing and caregiving services. As of June 30, 2013, we had received over \$270,000 and are continuing the effort to reach our goal!



Karen Pike Photography

Pictured left to right: Board member Kate Baldwin, Gail Moreau, Megan Humphrey, Fran Tobin, Dolly Fleming, Amy Hamlin.

### 30th Anniversary Celebration Sponsors

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Sam Mazza's Farm Market  
Vantage Press  
Vermont Folk Rocker

## Accomplishments FY 13

This year we worked with nearly 1,000 customers who were looking to stay in their home, to find affordable housing and/or to find a job providing personal non-medical care in the home.

- We helped 153 people stay in their home through the help of a homesharer or caregiver. Of these, 65 were elders or persons with disabilities who stayed at home or returned home from a nursing home or hospital with the help of personal non-medical caregivers of their choice.



*Pictured left to right: Amy Jelen, MaryLou Thorpe, Kirby Dunn, Shannon Day, Lisa Meyer, Holly Reed.*

- We helped 79 people find an affordable place to live in homesharing and another 16 live-in caregivers received housing as part of their compensation for their job.
- The average rent for a new homesharing match this year was \$187/month.
- The average length of a homesharing match this year was 546 days.
- We helped 78 people find jobs providing personal non-medical care in the home.
- Of the people who applied for services this year, 70% are considered very-low income by federal standards.
- To do this, 14 staff volunteers and our 6 person staff processed 309 applications, made over 950 reference checks, performed over 1,600 background checks, interviewed 255 new customers (many in their homes) and facilitated 243 in-home introductions.

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**A Personalized Service:** In both Homesharing and Caregiving our services are tailor made to the individual and we stay actively involved in all our matches to help with changing needs or any issues which may arise. We provide comprehensive screening including six different background checks and require at least three positive references.

**Homesharing** is an old fashioned bartering arrangement where someone with a spare room in the home needs a little help, such as companionship, help with meals or simply a protective presence in the home, and is matched with someone who is looking for an affordable place to live and can offer an average of ten hours a week of service. An affordable rent or help with utilities can also be part of the exchange.

**Caregiving** serves people who need more help than a homesharer can provide. They hire a caregiver to provide personal, non-medical care

in the home on either an hourly basis or as a live-in companion who works full-time in exchange for a salary plus room and board. Our Caregiving Program is unique in that it is based on the self-directed model of care where the caregiver works directly for the person receiving care.

### *Our Screening & Matching Process*

With over thirty years of experience, HomeShare Vermont has developed a comprehensive and client driven process to make the best in-home matches possible.

- Each applicant completes a written **Application**.
- A comprehensive **Interview** is scheduled to get to know what the person's needs are.
- **Background checks** are done and references are checked.
- If they would like to meet, we arrange an **Introduction** with staff present. Very often several Introductions might occur before the right person is found.
- If both agree, a **Trial Match** is set up, typically for two weeks.
- If that succeeds, a **Match Agreement** is signed, outlining the expectations of both parties.
- HomeShare staff stay in regular contact and are available if needs change or issues arise.



## Be Happier, Feel Safer, Sleep Better; HomeShare!

4

For the last decade, HomeShare Vermont has been using a results based accountability (RBA) methodology to determine how our services have helped people and to what degree. We don't look just at how many people have we helped, we also ask if our services improved their quality of life and how. The results from these surveys have been amazingly consistent over time.

This year one staff member, eleven board members, and four volunteers surveyed 107 program participants. Survey responses were compiled, analyzed and compared to previous years.

### Outcomes and Quality of Life Indicators

All persons offering their homes (homesharing program) and receiving care (caregiving program) were asked if they agreed with the quality of life indicator statements listed in the table below. The response options were strongly agree, agree somewhat, or no change due to match. The percent of respondents who either strongly or somewhat agreed with each statement indicates an improvement in quality of life as a result of being matched through HomeShare Vermont.

Statement	Homesharing Program	Caregiving Program
You feel happier.	88%	88%
You feel less lonely.	81%	84%
You feel safer in your home.	76%	88%
You enjoy your home more.	76%	76%
Household chores are completed more regularly.	67%	84%
You feel healthier.	57%	80%
You get out into the community more often.	50%	56%
You eat better.	50%	64%
You sleep better.	48%	64%
You call family less often for help.	48%	60%
You have more energy.	48%	52%
You worry less about money.	33%	20%
You see friends more often.	31%	36%

It is important to note that 100% of all respondents in both the homesharing and caregiving programs reported an improvement in at least one quality of life indicator.

To determine overall satisfaction, we asked participants to think about their entire experience with HomeShare Vermont from the application to the matching process. Of all survey respondents, 91% of those sharing their homes and 95% of those receiving care reported being "very satisfied" with our services.

A willingness to recommend our program to others is also a demonstration of satisfaction, and an astonishing 99% of those in the homesharing program and 100% of those in the caregiving program stated that they would recommend HomeShare Vermont to friends or relatives.

### New Trends

HomeShare Vermont has always been focused on helping seniors, but this year's survey data demonstrated just how much home seekers are benefiting as well. Home seekers were asked "What would your housing situation be like if you had not been matched by HomeShare Vermont?" This was an open-ended question. Of those who responded, 21% thought they would be in an unsafe living environment and 14% said they would be homeless. Combined, one out of three home seekers participating in the survey would not be living in a safe environment had they not been matched through HomeShare Vermont.

Outcomes surveys are a great tool because in speaking directly with participants we can collect important information about how we are doing as an organization. HomeShare Vermont identified that participants are very satisfied with our services and that we are in fact improving the quality of life for those matched allowing people to stretch their budgets and to feel safe at home.



Karen Pike Photography

Board member and staff volunteer Julie Burger Pierson

# Welcome New Board Members & Volunteers

In June we added three fabulous new members to our Board of Directors. **Jane Goodman** comes to the HomeShare Board with 35 years of experience in the field of education. She was the founder of the CCSU Teacher Apprenticeship Program for career-changing individuals preparing to enter the teaching workforce and recently retired from her position as a faculty member. Previously, Jane was a French and Spanish educator and Chair of the Foreign Language Department at Essex High School. Jane has been a Staff Volunteer with HomeShare Vermont since 2009.

She lives in Charlotte and when she isn't walking her 12 year old lab Chelsea, she is playing tennis, biking and always trying to get together with her son, a senior at UVM.

Also this past year two new Staff Volunteers joined our team. **Joan Palmer** is a graduate of UVM, owned and managed a Human Resource Consulting practice for over twenty years, taught at Burlington College and served on a number of non-profit boards including the YMCA, Champlain Valley Agency for the Aging, and Vermont Association for Business, Industry Rehabilitation. She lives in Burlington with her husband David.

**Faith Lowell** joined HomeShare Vermont as a staff volunteer in 2013. She has been a psychotherapist for over 40 years and is currently in private practice. She facilitated a therapy group for women in the Burlington prison for 5 years and taught abuse prevention in Addison County high schools. She also led a therapy group for the guards at Attica Prison after the riots there. Faith lives in Middlebury with her 4 Tibetan Terriers who are AKC Champions and she breeds 1 or 2 litters a year. Happily for her, they allow her to get on their couch.



**Chittenden and Grand Isle Staff Volunteers:**  
*From left to right: (back row) Joan Palmer, Radetta Nemcosky, Jane Goodman, Carol Miller. (front row) Dot Black, Amy Jelen, Ellie Campbell.*

**Radetta Nemcosky** has been with HomeShare as a Staff Volunteer since 2012 prior to joining the the Board. During her professional career, she worked as a high school guidance counselor. Devoted to helping seniors stay in their homes, Radetta has volunteered with Meals on Wheels since its inception and also serves on their Board. She enjoys cooking, calligraphy, and the arts and is also active in volunteer work for VPR and her church.

**Anmarie Plant** comes to the Homeshare Board with an extensive and varied career in leadership positions in health care and non-profits. She developed the geriatric care management program at the VNA and through that experience became aware of the many benefits and options for members of our community to participate in a Homeshare. She is currently working as a Case Manager for Ladies First through the Vermont Health Department.



*Anmarie Plant*



**Addison County Staff Volunteers:**  
*From left to right: (back row) Diana Cotter, Ruth Barenbaum, Manya Dickinson, Connie Kenna. (front row) Faith Lowell, Becky Stratton, Judy Sperry*

## Homesharing

# Volunteers Make Great Matches!

**6** Nestled in Milton is a cozy, comfortable home built by Ethel and her husband over fifty years ago.

With each room holding memories from their long marriage, Ethel did not want to leave her home. But, after her husband passed away and she had a fall, Ethel didn't like to be alone at night so her daughters recommended that she contact HomeShare Vermont.

"When I first met Ethel and her daughters," recalls Carol Miller, HomeShare Vermont staff volunteer, "it was clear that they wanted someone who would become a part of the family."

Staff volunteers, like Carol, play an essential role in the matching process. From interviews to introductions, volunteers work closely with staff in effort to find just the right housemate.

Carol found the right match in Diane, a newly single woman, working full-time, looking to be of help to others. At the introduction, Carol remembers, "They spent hours together and there was so much laughter. I knew right then that this would probably be a match."



Karen Pike Photography

*Ethel with her dog, Riley*

Diane and Ethel agreed and after a successful two-week trial, Diane moved in.

Six months later, Diane and Ethel are just like family. They've settled into a routine of sharing meals and conversation in the evenings while playing with Ethel's adorable Pomeranian-mix, Riley. They find time to have fun together, going out and about to the Apollo Diner or visiting the family camp, and are looking forward to attending the wedding of Ethel's grandson this fall.

Diane appreciates the companionship and her newfound independence while Ethel gains peace of mind having someone around at night. Ethel's daughter recently thanked Carol and HomeShare Vermont, "Not only did you help Diane and allowed Mom to stay in her home, but essentially you saved her life. You have given her the quality of life that all elder folks deserve. Thank you."

## Homesharing

# A Busy Home is a Happy Home

A mother of five, Jean was used to a busy household. But, after her children moved away, she missed the hustle and bustle that a home could have so she turned to HomeShare Vermont. "I was looking at a number of options because I didn't really need the house to myself, and it's nice to have some rental income," explained Jean, "but the particular thing I liked about HomeShare Vermont is that they do so much background research."

Jean was first paired with Kevin, a college student who wanted a peaceful space to concentrate on his studies. During the year that they lived together they developed a wonderful relationship. "It became a pleasure to see Kevin's friendly face every day," remembers Jean.

Jean came back to us a couple of years later and was introduced to Ann and they hit it off right away. Ann works at a country store in Brandon and teaches singing lessons a few times each week. Her busy schedule has her constantly coming and going, but that doesn't bother Jean. "I enjoy having someone around, even if it is just crossing paths in the kitchen once a day," says Jean. In fact, the pair are both so busy we were unable to take a photo for this report!

Jean and Ann will celebrate their second anniversary as housemates this October and they speak fondly of one another. "Jean is tolerant and she gives me space which is important to me," notes Ann. "It doesn't hurt that we have the same political beliefs, either. We are able to have good conversations." Jean appreciates their differences, "Where one lacks, the other makes up for it. Ann is creative and musical, which I was never inclined. Also, Ann doesn't mind cleaning and I am grateful for that."

Jean and Ann unanimously recommend homesharing to others. "It's worth it to take the time to find the right match. The two-week trial period is a good idea, too," says Ann.

Thanks to HomeShare Vermont, Jean's home continues to be a "high traffic area."



*Jean and her previous homesharer, Kevin*

Karen Pike Photography



One word comes to mind when watching Dorcas and her caregiver, Gertrude, interact with each other: warmth. They have developed a relationship full of admiration for each other. "Dorcas is a kind and polite person. She values people and I feel respected," appreciates Gertrude.

Just over a year ago, Dorcas was recovering from back surgery, and a subsequent infection rendered her weak and vulnerable for a fall. Though not immediately open to the idea of hiring a caregiver, Dorcas knew that she would need some help in order to return to her Burlington home of 55 years and be with her cats, Stretch and Kitty. At the advice of a neighbor, Dorcas called HomeShare Vermont. MaryLou Thorpe, Caregiving Coordinator, visited the next day and Dorcas was introduced to Gertrude by the end of the week. They quickly hit it off and a match was made. Simply put, "Dorcas was looking for help and I wanted to help



Karen Pike Photography

Gertrude and Dorcas with cat, Stretch

someone," says Gertrude.

Gertrude visits Dorcas seven days a week for a couple of hours in the morning and again in the evening helping with household chores, meal preparation, and personal care. A favorite pastime of theirs is watching "The Price is Right" with each thinking the other is better at guessing prices! When their match started Gertrude lived within walking distance to Dorcas' home which was convenient given the split schedule. Gertrude has since moved further away, but happily travels to Dorcas' morning and night and they look forward to seeing each other.

According to Dorcas, "Gertrude is a hard worker and she's kind of a mind reader. She knows what I need without having to tell her." Dorcas is able to remain independent most of the day and notes, "I can do it because of Gertrude; I couldn't have stayed home without her, that's for sure."

## Volunteers Play a Unique Role with HomeShare Vermont

HomeShare Vermont benefits from the assistance of 14 staff volunteers who each dedicate about 10 hours per week to our organization. Working closely with Amy Jelen, HomeSharing Coordinator, our staff volunteers assist with everything from interviewing new applicants to creating matches. Joyce Haggarty was one of these amazing volunteers.

With about 250 active participants in our homesharing program at any given time, staff volunteers play a crucial role ensuring that our process runs smoothly and efficiently. Photos of our current staff volunteers are on pages 4 & 5.

## Joyce Haggarty 1929-2013

When HomeShare Vermont held its first community informational meeting in Addison County in 2005, Katie Schmidt brought her next door neighbor Joyce, and I knew we had struck GOLD! Joyce was the East Middlebury Town Treasurer and a mover and shaker in the Congregational Church. She had helped to form Hospice, volunteered at the hospital, and still tutored a child in school—all of this, well into her 70s. She lived for years in the western part of the county farming with her husband Francis and taught music. She gave welcoming-teas for newcomers in the village. Before I left Joyce's home on my first visit, she had recruited me into the Bone Builders group. Joyce knew everyone. "So what's going on with you?" was her opening gambit.



Joyce served as a Staff Volunteer for HomeShare Vermont for several years—interviewing candidates, checking references, recruiting new volunteers and hosting monthly meetings in her home—and continued to give her time to the organization until she passed away in April, 2013.

Joyce was a fountain of information, a careful and caring citizen, a shrewd judge of character, and a self-respecting, old-fashioned friend, always ready for a good tid-bit, or a good laugh. I miss her terribly.

—Ruth Barenbaum

*Ruth is a HomeShare Vermont Staff Volunteer and spearhead of our expansion into Addison County.*

# HomeShare Vermont Dedicated Funds

July 1, 2012–June 30, 2013

## THE BUILDING FUND

As part of our 2007 Capital Campaign to build a new home for HomeShare Vermont we included a healthy reserve account, a dedicated fund now called The Building Fund. This fund can be used for building/office related expenses as approved by the Finance Committee. This year we made substantial renovations to our office to accommodate our two new staff members.



### THE BUILDING FUND

Beginning Balance	\$ 84,822.27
Interest & Contributions	2,252.96
Expenses	(30,608.03)
Ending Balance	<u>\$56,467.20</u>

## THE POLLY ROWE FUND

The Polly Rowe Fund was developed in 2002 after the passing of one of our founders and long-time volunteers, Polly Rowe. Polly volunteered for HomeShare for over eighteen years. She not only volunteered her time but was also a home-sharer herself. The goal of The Polly Rowe Fund is to generate income to help sustain HomeShare Vermont. To reach that goal, a portion of The Polly Rowe Fund has been placed in the HomeShare Vermont Fund at the Vermont Community Foundation. Special thanks to the donors listed as part of our annual appeal or 30th Anniversary Campaign who have dedicated their gift to the Polly Rowe Fund. They are listed with an \* next to their name.



### THE POLLY ROWE FUND

Beginning Balance	\$419,731.05
Interest	2,551.44
Donations & Bequests	101,575.00
Loss/Gain on Investments	29,652.40
Ending Balance	<u>\$553,509.89</u>

**SPECIAL GIFTS** Some donors have listed their annual or 30th gift in honor of or in memory of someone special. Many of these people have close ties to HomeShare Vermont. We are pleased to recognize them here.

*Contributions have been given in memory of the following:*

Heinz Ansbacher  
 Grandma Mildred Aube  
 Clarence Bosley  
 "Corby"  
 Elise Couture  
 Fran Culver  
 Jeanne D. Dube  
 Harriett P. Duffy  
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*Contributions have been given in honor of the following:*

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 Marion Thorpe  
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 Jean Wright



# Financial Report

July 1, 2012– June 30, 2013

Increased revenue growth this year resulted from a substantial increase in funding from the State of Vermont and the generous donations to our 30th Anniversary campaign. With these increased revenues we were able to add two additional staff members to increase our capacity to serve current and future homesharing and caregiving participants. The Finance Committee also spent considerable time monitoring our invested assets which continue to grow. This year a new investment account was established to be man-

aged by Merchants Trust Co. Again this year we wish to thank Cathedral Square Corporation for their continued collaboration and for providing bookkeeping services to HomeShare Vermont. Their involvement provides a segregation of duties and an additional level of financial controls that are often difficult to achieve in small organizations.

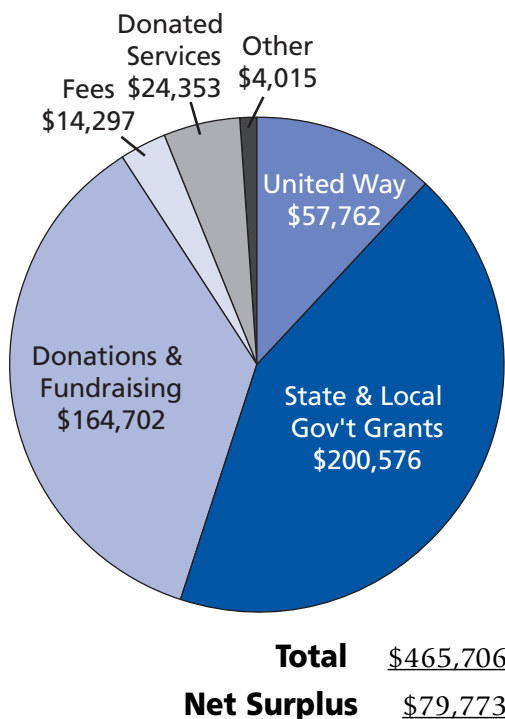


John Draper, *Treasurer*

## EXPENSES

Salaries	\$218,292
Payroll Taxes & Benefits	58,854
Donated Services	24,353
Advertising	12,219
Occupancy & Tech	19,607
Postage & Printing	15,996
AmeriCorps	1,091
Fundraising Exp.	8,158
Audit/Legal/Ins.	10,440
Services & Training	8,179
Background Checks	2,277
Mileage	3,843
Misc.	2,624
<b>Total</b>	<b><u>\$385,933</u></b>

## INCOME



## Audited Statement of Financial Position 6/30/13

### ASSETS:

Cash & cash equivalents	\$396,988
Fund held by VT Community Foundation	310,407
Investments held by Merchants Trust Co.	169,775
Office facility, at cost	221,028
Office furniture & equipment	19,854
Accumulated depreciation	<u>(43,219)</u>
<b>Total Assets</b>	<b><u>\$1,074,833</u></b>

### LIABILITIES AND NET ASSETS:

<b>Current Liabilities</b>	
Accounts payable	4,728
Accrued payroll	<u>10,681</u>
<b>Total Current Liabilities</b>	<b><u>15,409</u></b>
<b>Net Assets</b>	
Unrestricted net assets	
Undesignated	251,785
Designated by Board	243,101
Used for office facility, furn. & equip., less depreciation	<u>197,663</u>
<b>Total Unrestricted Net Assets</b>	<b>692,549</b>
Fund Held by VT Community Foundation	310,407
Restricted Net Assets	
for building related expenditures	<u>56,468</u>
<b>Total Net Assets</b>	<b><u>1,059,424</u></b>
<b>Total Liabilities &amp; Net Assets</b>	<b><u>\$1,074,833</u></b>

**Thank You!** We'd like to thank our donors at all levels of giving who have faithfully supported us this year through either a general donation and/or a 30th Anniversary contribution. In addition, HomeShare Vermont gives a special thank you to all the staff, volunteers and donors of United Way of Chittenden County.



10

**All Donors from July 1, 2012 to June 30, 2013.**

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If we have omitted anyone or included anyone who would prefer to be anonymous, it is unintentional, and we would appreciate your notifying the HomeShare Vermont office. Anyone who contributed after June 30, 2013 will be acknowledged in next year's annual report.

We wish to acknowledge Steve Alexander and Phyllis Bartling of Futura Design in Shelburne for their time and talents towards the design and production of this Annual Report and many other printed pieces for HomeShare Vermont.

Our programs and services are available to all people regardless of race, color, religion, sex, sexual orientation, age, disability, place of birth, ancestry or national origin.





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## ★★ OUR 2ND ROCKER RAFFLE! ★★

Again this year we are pleased to be raffling off a Vermont Folk Rocker and now is your chance to win this heirloom quality piece valued at over \$1,500!

Beautifully handcrafted by Jim Geier in his Starksboro studio, Vermont Folk Rockers are built to last generations. Their quilted design makes them incredibly comfortable. The chair being raffled is cherry-finished and comes with an adjustable cushioned headrest.

Tickets can be purchased by calling HomeShare Vermont at 802-863-5625 or online at [www.homesharevermont.org](http://www.homesharevermont.org).

Tickets are \$20 each and only 250 tickets are available, so don't wait – get yours today!

The drawing will be held at our Autumn Celebration on October 29th at Shelburne Museum. No need to be present to win.

Please note that raffle tickets are not tax deductible and free delivery of the rocking chair is available locally.

