A Letter from HOM What's the Future for Homesharing?

Tomesharing programs are Homesnaring programmers in numbers abroad and shrinking in the US. That was one of the findings of the first World Homeshare Congress in Paris sponsored by Homeshare International. The Congress was attended by representatives from the United States, France, Germany, Spain, Italy, England, Ireland, and Australia. Kirby Dunn of HomeShare Vermont was Country representatives to closing session of first World invited to give one of the Homeshare Congress. keynotes for the Conference.



"We were honored to be part of this groundbreaking gathering. It was very inspiring to hear from the European and Australian programs, many of which were modeled after HomeShare Vermont," said Kirby.

The US is credited with creating the intergenerational homesharing model but sharing housing with non-relatives has been around for many years. However, it started to grow as a service offered by non-profits in the early 1980's. Initially the focus was on helping elders to remain in their homes, but in the US the model has been adapted to help a variety of different populations including families, the homeless, and populations with special needs.

Reasons for optimism

Since the early '90's there has been a 75% decrease in the number of programs in the US. There are reasons

Future of Homesharing, continued on page 9

The Year in Review

Our Services

7 Tith the economic downturn we saw many more people turn to homesharing to help make ends meet. The Homesharing Program had a 39% increase in

matches over last year. We saw an increase in people needing an affordable place to live, but also more homeowners who needed financial assistance with rent or utilities to be able to stay at home. The average rent for new homesharing matches this vear was \$159/month.

Caregiving continues to be an extremely busy program and we are seeing more homeshar-

ing clients able to stay in their homes longer thanks to the addition of Caregiving services. We are also seeing a number of clients coming out of hospitals or nursing homes,

thanks to live-in care.

This year we have focused on improving service delivery and increasing outreach. We have expanded the background checks we



Outreach with Ali, George, & Becky.

do, revised interview and application forms and cross-trained staff and volunteers. We are just finishing up a new website thanks to Futura Design and Michael Sacco. We are

also putting the finishing touches on welcome handbooks to help customers understand our services better. A new database should help us work more efficiently.

AmeriCorps: A Key Partner

We wouldn't have been able to do all of this without the help of two great AmeriCorps members. Special thanks to the Vermont Housing and Conservation Board who made this possible. They do everything from working with clients to helping us with technology. Their youth and enthusiasm are a joy to be around.

The Staff Volunteers

HomeShare Vermont now has fourteen Staff Volunteers who help provide the core of our service delivery.

The Year in Review, continued on page 2



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A Letter from HOME ANNUAL REPORT FY 09

is published by HomeShare Vermont 412 Farrell Street, Suite 300 South Burlington, VT 05403 phone: (802) 863-5625 fax: (802) 651-0881 E-mail: home@sover.net Website: HomeShareVermont.org

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The Year in Review, continued from page 1

They offer an average of ten hours/ week of work in the office or with clients. They often have their own caseloads and attend weekly staff meetings. They help with outreach and program development. Welcome to our newest volunteers: Barbara Bucannon, Diana Cotter, Manya Dickinson, Jane Goodman and Kathleen Kocherlakota who joined us this year. They join Dot Black (27 years with HomeShare), Julie Burger Pierson (10 years), Ellie Campbell (6 years), Joyce Reddy-Bradbee (5 years), Ruth Barenbaum (5 years), Joyce Haggarty (4 years), Katie Schmidt (4 years), Connie Kenna (4 years), Judy Sperry (2 years), Carol Miller (2 years), Becky Stratton $(1\frac{1}{2} \text{ years})!$

Pharmacy Outreach

This past winter, HomeShare teamed up with two Burlington pharmacies, Rite Aid on Cherry Street and Lakeside Pharmacy



Lakeside Pharmacy staff.

on Pearl Street. Both pharmacies generously allowed us to sticker HomeShare Vermont's information on a combined total of 2,500 pharmacy bags. HomeShare Vermont would like to extend a huge thank you to Lakeside Pharmacy and Rite Aid Pharmacy for collaborating with us!

Cooking & Nutrition Classes Offered

In January, Mary Woodruff, a nutritionist from the Department of Disabilities, Aging, & Independent Living (DAIL), led a cooking and nutrition workshop. It was geared towards healthy habits and recipes for elders. The program was designed to help our caregivers feel more comfortable with the choices

they made when cooking for themselves and their clients. Mary did a demonstration in the kitchen where all attendees prepared, cooked and ate a healthy meal. She focused on dishes that are suitable for lunch and dinner and meals that would be attractive and healthy for older adults. We then discussed food safety preparation, portion control, and much more. Due to the huge success of this January workshop we offered a second workshop in June with all new recipes and attendees! Thank you DAIL and Mary!

Safe Medication Project

In the fall of 2008, HomeShare was approached by two nursing professors from the University of Vermont.

They wanted their fourthyear nursing students to develop a research project focused on elders at home and how they manage their medication

use. About 20 of our clients agreed to have a UVM nursing student come into their home to discuss how they manage their medication use. The end result was quite positive for us, and a little dry for the researchers; they found our clients were successful in managing their own medications at home!

The students also developed medication safety trainings for our caregivers. In April, we had three consecutive trainings held at the office with fifteen caregivers in attendance. Thanks to all the UVM nursing students who participated.

Service Report

July 1, 2008 - June 30, 2009

	HOMESHARING	HOURLYCARE	LIVE-IN CARE	Totals
Intakes	510	103	73	686
Applications	192	67	32	291
Interviews	141	45	15	201
Introductions	82	45	32	159
Matches	75	101	55	231

This year we saw a huge increase in all phases of the homesharing program due mostly to the economy. Our homesharing matches increased 39% over the previous year. The numbers above show how laborintensive the matching process is. While our goal is to match everyone who comes in for services, sometimes our programs aren't a good fit, and other times we just don't find what someone is looking for. Matches include those started this year and those continuing from previous years.

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 five different background checks, and require at least three positive references. You get to chose who to match with based on who is most compatible.

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 and 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 care receiver. Caregiving allows people to stay at home, with their loved ones, pets and familiar surroundings.

Our Screening & Matching Process

With over twenty-five 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 approved for the program, staff starts to look for a match
- When we have someone we think might be a fit, we call and tell them about each other.
- 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.



Weekly case conference meeting with volunteers.

Rocking Out with HomeShare

Before she got sick, Tiffany trained in gymnastics and acrobatics. However, after living with chronic fatigue syndrome (CFS) for several years, Tiffany was functioning at about 10% capacity, compared to a healthy person's level of activity. She is a smart, talkative and open-minded young woman, but lacked the energy to do daily tasks that many of us take for granted such as housekeeping, grocery shopping and preparing food. It was a challenge to get out of bed some days. Supportive friends and family helped a lot, but living alone was becoming difficult. "I had all the incentive in the world to call," she says of contacting HomeShare Vermont a few years ago.

Tiffany, 27, now lives with her second "match" through HomeShare Vermont. Carissa, 23, was working more than full-time hours but unable to afford an apartment and was "couch surfing" with friends. At that time, Carissa's dream of going to art school seemed like an impossibility. Her mom encouraged her to consider homesharing.

Most young people start the day with unlimited energy, but with CFS, you have to choose how to use your limited supply. Carissa's help allows Tiffany to focus on work, exercise and fun, rather than



Carissa and Tiffany.

just grocery shopping, cooking, and cleaning. A little help around the house goes a long way for Tiffany—not only is she able to work part time, but she recently auditioned and is now writing songs and singing with a local band. Tiffany says, "I was apprehensive about matching up with someone who is

busy with two jobs, but Carissa's a really special person."

Both in their 20s, they are quite different from a typical, inter-generational homesharing match. Tiffany and Carissa have a lot in com-

mon—art, music, and karaoke video games! They both love organic, whole foods, and Carissa keeps the kitchen stocked.

With the money she is saving on living expenses, Carissa plans to begin art classes at UVM in the fall. Tiffany's new band just recorded their first track and plans to book some live shows. The best thing about homesharing? Tiffany says it's the unexpected benefits. Carissa not only helps to keep the household running, she boosts Tiffany's selfesteem, helping her to see how much she has to offer. "I couldn't have imagined how much I would gain. I'm productive in the world again."

Friends and Treasures

E laine had always been very active. She raised four children and enjoyed scouring yard sales, thrift

stores and antique shops for treasures needing to be refurbished. Living alone was not a natural fit. After her husband passed, Elaine wanted to stay right there in her comfortable home of 37 years where she could work on her projects. Continuing to be independent was what her family wanted for her as well. Elaine felt having a live-in companion would help to give them all a secure feeling. Contacting HomeShare Vermont seemed to be just what to do.

Vianne had moved to the

Vianne, Margaret & Elaine.

Burlington area to be closer to her daughter who was attending UVM. She had raised her family and taught

school for thirty years in Wyoming, but while driving around Burlington one day, she knew this was where she wanted to live. Temporarily living in Williston, without a permanent place to stay, Vianne was open to ideas. Speaking with a friend from her church, she learned of HomeShare Vermont.

One night while working at Shaw's Pharmacy, Vianne noticed a name badge on a woman picking up some medicine. It said,

Welcome to Charlie's Retirement Home!

In 2002, Charlie's macular degeneration was progressing such that living alone was becoming difficult. In his late eighties and nearly blind, his family worried about him being alone. While Charlie had many fabulous people in his life, and his home was always full of people coming and going, he needed someone to help with day to day tasks.

Since then Charlie has had four different homesharers from HomeShare Vermont. He often jokes that he has become a HomeShare addict. "They have all been great people. I'm not going to leave this house," said Charlie. "I am going to stay here where I've lived for over 40 vears."

Jesse came to Vermont to work as a social worker. He was considering going back to school to become a doctor and started the post-bacc pre-med program at UVM. He soon found how expensive the housing was and

knew he wasn't going to be able to afford his apartment if going to school full-time. In January, Jesse, along with dog Bozwell and cat Willie, moved in with Charlie, a retired physician and former professor at the UVM Medical School.

Jesse and Charlie spend several evenings a week together discussing current events, reviewing Jesse's latest reading assignment or just sharing a meal. Jesse helps with pet care and errands. In exchange, he gets a great place to live close to school. "It's really more

than just a place to live," said Jesse. "It's been wonderful to learn from Charlie, to hear of his experiences, his encouragement of my schooling; it has been life altering," said Jesse.

Charlie noted, "It is not always easy but it's worth the effort to stay in your home. I resisted homesharing at first, but HomeShare Vermont checks out their ID,

> their footprints, and their tooth prints and then brings by several candidates to interview. I get to choose who I want to live with."

During the time Jesse's been homesharing, Charlie's health took a sudden turn for the worse. Jesse went above and beyond and provided much help until HomeShare Vermont was able to bring in round-the-clock caregivers. Jesse's still there along with three very special caregivers: Christian who does overnights, Nancy weekdays and Tom weekends. They work as a team and make sure Charlie's home runs

smoothly. "The toughest job is keeping Charlie's social calendar up-to-date," said Nancy.

"Instead of going into a retirement home, I now have my own retirement home right here, with my own personal caregivers, round the clock, meeting my every need. They are amazing and interesting people. I have my dog Pooh Bear at my side, with my friends able to drop by and visit, and family to stay over. It couldn't be any better. I am very blessed," said Charlie.



Charlie, Jesse & Nancy with Bozwell and Willie.

Friends and Treasures, continued from page 4

MaryLou Thorpe, Caregiving Coordinator HomeShare Vermont, Vianne said, "I have a friend that told me about HomeShare Vermont and I was going to call tomorrow to find out more!" MaryLou explained that the office was practically next door and that she should stop by.

Elaine and Vianne have been living together since May and have quickly become true friends. They enjoy many of the same interests, including a passion for excursions and yard sales. Margaret, Elaine's daughter, said, "One of the reasons they have become friends so quickly is that Vianne is always thinking of fun things to do and places to go. They go to lunch, to yard sales and to Recycle North."

Vianne says the family has been so great and very welcoming. "Margaret is always available and we have such a great working relationship. We have dinner together as a family every Sunday at her house. I really couldn't feel more supported."

Both Elaine and Vianne are happy sharing a home filled with memories and spirit. Both women are teaching and learning from one another every day. Elaine said it best as the curtain closed on our visit, "HomeShare Elaine and Vianne share Vermont certainly works for me and I highly recommend it!" ↑



a love of fixing things up!

July 1, 2008 - June 30, 2009

BUILDING ENDOWMENT FUND

As part of our Capital Campaign to build a new home for HomeShare Vermont we included a healthy reserve account, a dedicated fund now called the Building Endowment Fund. We moved into our new home in May 2007. This fund can be used for office related expenses as approved by the Finance Committee.



POLLY ROWE ENDOWMENT FUND

The Polly Rowe Endowment 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 homesharer



herself. The goal of the Polly Rowe Endowment Fund is to generate income to help sustain HomeShare Vermont.

A special thank you to the following donors who have given this year:

Stewart and Becky Arnold
Malcolm Chamberlain
Bernard Lisman
Alice Rowe
Harry Rowe, M.D.

BUILDING ENDOWMENT FUND		POLLY ROWE ENDO	POLLY ROWE ENDOWMENT FUND		
Beginning Balance	\$ 90,061.25	Beginning Balance	\$140,548,00		
Interest	3,413.99	Donations	1,775.00		
Expenses	(3,130.80)	Interest	6,610.66		
Ending Balance	\$90,363.94	Ending Balance	\$ 148,934.10		

Total Endowment Funds \$ 230,609.25

Consider an Endowment Gift

Planned Giving is a way to leave a philanthropic legacy for HomeShare Vermont. Planned gifts provide an ongoing source of income to assure the long-term viability and sustainability of our programs. As a community-based organization even small bequests can offer a relatively large income stream. Please join the donors above in helping to assure that HomeShare Vermont is here to assist future generations.

Please consider adding HomeShare Vermont to your estate plans.

s treasurer I am again Apleased to report that we met our financial goals and our fiscal year ended with a surplus. When we started the year we faced a potential shortfall due to a major funding cut. We reduced expenses by temporarily cutting back on administrative hours. We also found savings in budgeted health care costs. Thanks



George Mona, board treasurer

to our collaborations with our neighbors at Cathedral Square Corporation we found additional cost savings. The State of Vermont assisted us with a special twenty-five thousand dollar grant and year-end fundraising exceeded expectations.

The board and staff continue to work hard to assure we develop adequate reserves and continue to build endowment funds.

Finally, I thank the executive director and my finance committee for the close and specific monitoring of expenses and investments.

Audited Statement of Financial Position 6/30/09

ASSETS:

Cash & cash equivalents	\$373,733
Grants receivable	<u>9,324</u>
Total Current Assets	<u>383,057</u>
Office Facility, at cost	202,352
Office furniture & equipment	14,525
Accumulated depreciation	(13,845)
Total Assets	\$ 586,089

Total Assets	<u>\$ 500,005</u>
LIABILITIES AND NET ASSETS:	
Current Liabilities	
Accounts payable	2,406
Accrued payroll	3,960
Total Current Liabilities	6,366
Net Assets	
Unrestricted net assets	
Undesignated	130,384
Polly Rowe Endowment Fund	148,934
Used for office facility, furniture & equipment, less depreciation	210,041
Total Unrestricted Net Assets	489,359
Restricted Net Assets for capital expenditures	90,364
Total Net Assets	579,723

Total Liabilities & Net Assets \$ 586,089

INCOME

United Way		\$	48,617
State Grant		1	102,545
Municipal Grants			17,100
Foundations & Grants			18,529
Annual Appeal			24,050
Inns Raffle			9,495
Spring Party			11,856
Donations			26,611
Customer Fees			9,760
Interest Income			3,305
7	Tot al	\$2	271,867

EXPENSES

\$133,886
27,738
12,500
4,056
5,362
3,876
9,149
3,358
6,052
1,267
2,407
8,307
5,319
1,838
3,379
3,520
\$232,016
\$39,852

A Taste of Home-A Great Success!

The A Taste of Home party was a night filled with spectacular food, great live music and generous pocketbooks! This year's spring fundraising event was a huge success raising nearly \$12,000 for HomeShare Vermont. Main Street Landing again hosted us, this year at Union Station on Burlington's waterfront. The room was larger so we added bigger things like live music by Brett Hughes and Marie Claire, a live auction component and two new food sponsors!

This year's new food sponsors were *bevo catering* and Debbie Drury, a representative for *Wildtree Products*. They joined last years food sponsors *Leunig's Bistro, Three Tomatoes* and *A Single Pebble* in what turned out to be a gourmet tasting of Burlington's finest in hors d'oeuvres. The food

alone was reason to attend.

Beautiful artwork and local goods lined our auction tables and healthy bidding on homemade wine made our live auction tons of fun.

This year we raffled off a set of Red Sox tickets for a home game to one lucky person who purchased a Taste of Home ticket. The winner of the "HomeRun Raffle" was Mary McClintock of Burlington! We hope she has a great time watching the Red Sox play the Blue Jays at Fenway Park!

HomeShare Vermont also honored Natalie Thompson, a homesharer for over 10 years, with a special bouquet and beautiful necklace. Natalie was not only the number one silent auction donation solicitor but she made over 100 beaded bracelets as gifts for every-

one who attended.

We want to thank everyone who participated in the event, donated, supported and celebrated HomeShare Vermont that wonderful night. Please remember to thank our local businesses that donated by visiting their stores and patronizing their restaurants. And don't forget to save the date for next year! This is one party you won't want to miss!

SAVETHE DATE:

Friday, May 14, 2010 Union Station Burlington, VT



Monica, Rachael & Mané enjoying the food. Kirby Dunn with Board President David



Kirby Dunn with Board President David Porteous.



Chef Donnell and sous chef Stephanie from Leunig's.



Wildtree caterers!



Our new brochure with flowers.



Joyce hoping to be the highest bidder!

MISSION:

HomeShare Vermont: bettering the lives of elders and people with disabilities by helping them remain in their homes. We match them with people who are looking for affordable housing and/or caregiving opportunities.

Thank You! A Taste of Home donors

Silent Auction Donors

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Burlington City Arts

Burlington Discover Jazz Festival Burlington Electric Company Burlington Parks & Recreation

Burlington Telecom

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Trisha Thibodeau
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Vermont National Country Club Vermont Paint Store Vermont Teddy Bear

Vermont Mozart Festival

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Shelburne Road Price Chopper Floral

Shop

Shelburne IGA The Converse Home

Robert Miller Community Center

Green Mountain Railways

Chef's Corner Creative Habitat E1 Collective Studio Maggie Conant & Burlington High School

Future of Homesharing, continued from page 1

for optimism. The current programs, many of which have been around for a number of years, are generally strong, having adapted to meet changing times and meeting important local needs. We could argue that the weak programs have failed and the strong have carried on. Certainly, HomeShare Vermont has never been stronger as an organization than it is right now.

While many people benefit from the services of a third party to help them find, screen and match-up with a homesharer, today many more people are able to homeshare on their own due to the internet. The organizational numbers don't count how many people are doing this on their own. The growth in the online service, Craig's List, makes finding a roommate easier and cheaper than ever. Also, with the aging of baby boomers, many of whom have shared housing in college and the increase of non-traditional households, home-

sharing may be a naturally occurring phenomenon.

Similarly, many factors point toward an increase in the need for homesharing: the recession, the aging of the population, high heating costs, the cost of housing, and the decrease in household size while homes have increased in size.

Homeshare Congress participants agreed to pursue a number of goals including developing standardized evaluation materials, the need for research on best practices, sharing screening and marketing materials and developing a third party accreditation for homesharing programs. There is nothing like talking with other people who understand what you do day in and day out, and getting new ideas from colleagues; it's exhilarating!

Thank You! We'd like to thank our donors at all levels of giving, who have faithfully supported us again this year. HomeShare Vermont gives a special thank you to the staff, volunteers and donors of the United Way of Chittenden County.



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