



HomeShare Vermont Strategic Plan 2022-2026

After a year's delay due to COVID, the board and staff started to develop a new strategic plan for HomeShare Vermont in 2021. We hired consultant Melissa Levy of Community Roots in Hinesburg to help us. In August and September 2021 nearly 45 surveys and phone interviews were completed with organizational partners, current & former board members, staff and volunteers. Almost universally, they had wonderful things to say when asked to describe HomeShare Vermont and they had many different suggestions of what we could be doing over the next few years.

The board held an in-person strategic planning work session in October 2021 to review the survey and interview responses and to prioritize goals and strategies to be included in HomeShare's strategic plan for the next 3-5 years.

From the surveys, interviews and board retreat two primary goals rose to the top with clear action items to help us reach these goals. These are listed below and discussed in detail in the following pages of this Strategic Plan.

The overarching goals of this strategic plan are:

1. to increase the numbers of Vermonters who benefit from homesharing, and
2. to continue to grow and strengthen the organization.

We will do this by:

- targeting our outreach and marketing to make people aware of the services we offer.
- increasing collaboration with other organizations, employers, colleges, and health care providers and others who can refer people to our services.
- exploring the potential of developing incentives for people to share their homes.
- defining how to expand our service area to other parts of the state.
- promoting financial sustainability.
- expanding our volunteer base.
- developing succession plans for staff and board.

As part of this strategic plan, we have three strategies to increase the number of Vermonters benefiting from homesharing:

1. Targeted outreach and marketing to make people aware of the services we offer and how homesharing could benefit them.

Background

As a small and unique service, we know that most Vermonters are not aware of what homesharing is or who could benefit. We also know that homesharing is not for everyone, and not everyone would make a good homesharer. For most people, hosts or guests, homesharing is not a lifestyle choice but something they usually do out of a financial necessity; to stay in their own home or to find a home they can afford.

As an organization, we know the benefits of homesharing and do an excellent job quantifying the outcomes that both hosts and guest receive. For instance, 83% of our matched hosts last year told us they feel less lonely by having someone living with them, yet we know we are not going to get them to homeshare by appealing to their loneliness.

We also track how people heard about us from a question on the application. There is a huge variety of responses reflecting the numerous outreach efforts that we undertake. However, for hosts, the highest referral source is word of mouth and for guests, it is Craigslist.

In addition, due to the housing crisis, we constantly have a huge imbalance between hosts and guests. At any given time, we have 3-5 times as many guests looking for housing as we have hosts willing to share their homes. Yet, for our more rural homes, we have the opposite issue; we have a very difficult time finding guests, as often these homes are not near jobs, schools, social activities or on a bus line.

We also know the barriers to sharing one's home from a 2017 AARP-VT sponsored Survey of Vermonters age 45+:

- Privacy, safety and security, and compatibility are the three biggest concerns people have about sharing their home.
- Screening services are viewed as the most important services provided by HomeShare Vermont (compared to trial period, written agreement, and ongoing support after match).

Currently, our outreach consists of many different avenues from paid advertising to flyers, social media, Front Porch Forum posts, and much more. We need to evaluate what we are doing currently and who we are reaching with current efforts. We have three target markets: people looking for housing, people with a home to share and family members of elders and persons with disabilities.

We need to further refine and target our marketing, regularly create new content and then focus on proper delivery channels for our message.

We will develop and implement a targeted marketing/outreach plan that is presented to the Board's Outreach Committee. To accomplish this, we will look to hire a professional marketing consultant to evaluate what we are currently doing, possibly use focus groups to give us specific feedback and help us create more targeted messages and materials for our outreach efforts.

Measuring Success

- Increased host applications
- Increased match numbers
- Track and evaluate how host and guest applicants hear about HomeShare.

2. Increase collaborations with other organizations, employers, colleges, and health care providers who can refer people to our services.

Background

We are a small program and we are laser-focused on one specific service, homesharing. Getting others to help us in our outreach efforts is key to being able to help more people. With the turnover in staff at many businesses and organizations over the past few years, it is time to focus community education on what homesharing is and how it can benefit other's clients, customers and employees. If we look at just one organization, say a local agency on aging, they have thousands of clients. If even just a small percentage of them apply to share their home, that could dramatically increase our number of homesharing matches. We cannot reach every Vermonter at just the right time in their life that homesharing is needed, but we can work with others to reach many more people than we can do alone.

Measuring Success

- Set targets for how many employers, non-profits, civic organizations, religious groups, health care providers and senior centers to engage.
- Where appropriate, develop a formal referral protocol similar to the one we have with SASH, where referrals go both ways.
- Track the number of interactions and presentations completed.
- Track the number of applications and matched participants referred.

3. Explore the potential of developing incentives for people to share their homes.

Background

Homesharing programs across the country are experiencing the same growing imbalance between those willing sharing their homes and those needing to find a home. Many homesharing programs are exploring different types of incentives to encourage more people to share their homes to help people find an affordable place to live.

We will look at what incentives other homesharing programs have tried, then work with local communities in Chittenden County where affordable housing needs are the highest, to develop an incentive pilot project.

Measuring Success

- If feasible, fund and implement a geographically focused pilot incentive program.
- Measure host applications and matches.
- Ascertain whether or not the incentive encouraged them to apply and/or match.
- At the end of the pilot, do a cost/benefit analysis to decide if this is something that should continue and/or be expanded.

As part of this strategic plan, we have four strategies to continue to grow and strengthen the organization:

1. Expand Geographically

Background

In 1982 HomeShare Vermont (then Project HOME), opened its doors serving the greater Burlington area. Over the years and as we had the capacity to do so, the organization eventually expanded to serve to all of Chittenden County.

In 2003 in collaboration with the organization CIDER, we started to serve the residents of Grand Isle County with the efforts of a new Staff Volunteer, Izzie Hayes who was followed by Carol Miller years later.

In 2006 we expanded our service area to include Addison County. A local activist, Ruth Barenbaum, then turned HomeShare Staff Volunteer, laid the groundwork for our expansion by helping to recruit and train volunteers and providing outreach for the program. We added the town of Brandon in Rutland County as a volunteer has been willing and able to serve that town for us and continues to do so today.

In 2013 we updated a long since out of print DIY manual, *A Vermonter's Guide to Homesharing*, to offer Vermonters outside of our service area information on how to create a homesharing arrangement on their own if there was not a program in their area. As part of our 40th Anniversary in 2022 we will update this guidebook.

In 2014, after the closure of our Caregiving Program, we recognized that we had the capacity to expand again so we started to serve Franklin County.

In late 2019 with the closure of the 10-year-old central Vermont homesharing program (Home Share Now), we added Lamoille, Orange and Washington counties to our service area and opened an office in Montpelier. When the pandemic hit several months later and slowed the interest in people wanting to share their homes, our caseload did not warrant a full-time staff position for Central Vermont. Now, several years later we are seeing increasing interest in homesharing and look to add staff and volunteers for the Central Vermont region. This brings us to the present.

Focus on Central Vermont

As a small and strong organization, we have been able to respond when opportunities to expand have come our way. We want to maintain that flexibility and be nimble to do the same going forward. We know that our Central Vermont service area has much more potential, so in the short term, we will focus our organizational efforts on strengthening our service delivery in Central Vermont. This will include hiring new staff, recruiting new volunteers, and increasing outreach efforts.

Measuring Success

We will measure our success by the increase in applications and matches made in Central Vermont and the number of new volunteers brought on board.

Future Geographic Expansion

We strongly believe that if homesharing services are to be offered in other parts of the state they should be of a uniform standard that we have developed. We have the experience and knowledge to know what works and what doesn't. The confusion for clients and donors when multiple homesharing programs do things differently is not helpful to sustainability of service delivery.

Aspirational Goal– *HomeShare Vermont would like to expand our service area to cover the entire State of Vermont and offer the same personalized and comprehensive homesharing service to all Vermonters regardless of where they live.*

It is very difficult to put a specific timeframe in place for our next expansion or to determine a date by which we will cover the entire state. While not within the purview of this strategic plan, we want to go on record that this statewide service delivery is our long-term goal.

Expansion can only occur if there is the capacity to do it well. We need to maintain stable staffing and funding for our current service delivery. We would need a 2-year staffing and funding plan to serve any new geographic area and would need dedicated funding prior to any new service delivery expansion.

With the pandemic we did much of our work remotely, using Zoom and the telephone instead of meeting with people in person. This works well for interviewing new Guest applicants. However, it is not a viable option for many of our Hosts and does not allow us to see the homes and facilitate introductions. Therefore, we could not do a successful program expansion using technology alone. For a program expansion we need to be able to physically meet with candidates and would need an office, staff and/or volunteers within a reasonable distance.

We would also want a local partner such as a non-profit organization, business, religious group or government agency to invite us into the new area and be willing to offer some type of support to make the expansion successful. This partnership could be in the way of funding, office space, or help with outreach or volunteer recruitment.

2. Strengthen HomeShare Vermont by Promoting Financial Sustainability

Background

For the last twenty years, HomeShare Vermont has ended each fiscal year having raised more income than it spent. The purchase of our primary office space reduced and stabilized our occupancy costs. These efforts have resulted in HomeShare being able to put some funds aside for a rainy day and get through the ups and downs of securing certain funding sources.

In 1988 our first State of Vermont appropriation was \$25,000 when we served only one county. The State has continued to be a key partner and has supported us each year since. While we have developed a myriad of funding sources since then, today we receive \$280,000 from the State of Vermont to serve 7 counties. Nearly 50% of our current operating income comes from this annual grant from the Vermont Department of Disabilities Aging and Independent Living. This heavy reliance on one funding source is of concern.

In 2002 with the passing of one of our founders, Polly Rowe, the then Project HOME Advisory Board established the Polly Rowe Memorial Fund with \$1,620 of memorial gifts. In 2003 the Advisory Board established a Planned Giving program to encourage the solicitation of bequests. In 2005 the new Board of Directors of HomeShare Vermont established a formal investment policy. In 2018 the board adopted a specific endowment goal of raising \$1.7 million. Today, we are within \$400,000 of reaching this important goal.

Goals

To put us on the best financial footing possible, to expand, and to continue to support the independence of our neighbors and meet the housing needs of vulnerable Vermonters for the next 40 years, we will seek to:

1. Increase the amount raised by our annual fundraising efforts.
2. Increase the amount of grant funding we receive from private foundations.
3. Continue to grow The Polly Rowe Fund, our endowment, to eventually provide us with 15% of our operating income.
4. Seek and accept occasional special funds that might support one or more aspects of HomeShare.

Measuring Success

We will measure our success by the year-to-year increase in dollars raised through donations and grants. For the Polly Rowe Fund we will seek to increase the number of Planned Gifts made and end each year with a larger balance in the endowment funds than the year before through both gifts and growth.

3. Expand our Volunteer Base

Background

HomeShare Vermont was originally formed by The Retired Senior Volunteer Program (RSVP) and one of our main sources of strength over the years has been the work of our Staff Volunteers. In fact, when originally started, then Project HOME's goals were not only to help elderly neighbors stay in their homes and others to find affordable housing, but also to provide more challenging and meaningful activities for volunteers! We started as an all-volunteer organization and our volunteers continue to outnumber our paid staff.

These Staff Volunteers do everything from interviewing new potential hosts and guests, to making introductions and creating homesharing matches. They remain in touch with their clients for as long as they are active in our program. They attend regular case conference meetings, in some cases weekly, with staff and other volunteers to report on the status of individuals and to figure out who might make a good match. In essence, they, along with the program staff are providing the screening, matching and ongoing support to our program participants.

From the 2010 Study by Professors Nick Danigelis and Fred Fengler on our Volunteers, we find that the key benefits for our staff volunteers were learning, self-growth and satisfaction. This volunteer role also has a strong social component both within the group and with participants. For HomeShare Vermont, volunteers not only help us provide our service but also act as ambassadors in their local communities and encourage their neighbors to homeshare. This is a unique volunteer role in a non-profit. Most of our volunteers are retired professionals such as social workers, guidance counselors or teachers.

Next Steps

We plan to establish a new group of volunteers for the Central Vermont region. We will start in Washington County where we have the largest number of applicants and existing matches and thus the greatest need. One of the most important aspects of volunteering for the volunteers themselves is the social aspect, the case conference meetings, so we can only recruit new volunteers if people are feeling safe gathering together. Once in person meetings are more acceptable, we will hold some volunteer recruitment events such as open houses, a lunch or event at a local church or library. Our experience has been that once we have 1 or 2 volunteers, they will likely encourage others to join us and a working group is formed. At these community meetings we will share information about our program and the types of volunteer roles we have available. We will work with the Green Mountain United Way and other organizations and local colleges in the area to help with recruitment.

Over the next three years we also want to recruit new staff volunteers to replace those who have retired from our Chittenden and Addison groups after many years of service. We will work with partners such as the United Way Volunteer Center, RSVP and others to seek out new

candidates. Succession planning for volunteers is just as important as succession planning for long-time staff members.

Measuring Success

We will measure our success by the increase in the number of staff volunteers and the number of hours of service they provide. Our goal will be to see these numbers increase year over year.

4. Develop Succession Plans for Staff & Board

Background

HomeShare Vermont has a small and dedicated staff. Any turnover of trained and hardworking staff members influences service delivery. Several of our staff members have been here for a decade or more. Much of their day-to-day knowledge and procedures are not written down. We have seen in other non-profits what can happen when a leader leaves and there is no clear succession plan in place.

We need to be better prepared both for emergency and planned staffing changes. To this end we have already developed an emergency succession plan if the Executive Director were to leave unexpectedly. However, we need comprehensive and accurate job manuals for each position in the organization to be better prepared for the future. This would include a detailed explanation of various job duties, how to accomplish them and in what timeframe.

The Board of Directors has a policy of term-limits for board members as outlined in our by-laws. This has continually pushed us to bring in new board members on with new ideas and talents. We have worked to increase the board representation from the various counties which we serve. The board's Executive Committee has acted as its nominating committee. With the growth of the organization's service area, staff, assets and budget, board members succession planning is just as important as that of the staff. Having this strategic plan should help us recruit future board members.

Measuring Success

Our goal would be to have the staff job manuals completed for each position by July 1, 2023 and updated annually thereafter as part of the performance reviews.

We must acknowledge the 800-pound gorilla in the room: COVID and the pandemic. The best laid plans, studies and outreach campaigns will not be successful if people continue to be fearful of bringing another person into their home as they may be a vector of illness. That doesn't mean we delay or don't try, it just means that we must evaluate our results in a year, or two or three, considering the world around us.