## COMPATIBLY Introverted

t 27 years old, Emily is not the typical Home-Share host. When she bought her South Burlington condo in 2019, she considered renting out her extra bedroom. But it took some time for her to become comfortable with the idea of living with a stranger.

When she was ready, she decided it would be better to get some help rather than finding a housemate on her own. She had heard good things about HomeShare Vermont. "It was a combination of the background checks and then the fact that they do the matching to find somebody with similar ideals," Emily said.

Abby, a 28-year-old working in education, knew she couldn't afford to live on her own. But she was having a hard time finding people to live with who she thought would be a good fit. As she progressed through Home-Share Vermont's process, Abby realized she'd prefer to live with someone closer to her age but still utilize the vetting process to find a compatible fit. It worked wonderfully.

"Having someone else to independently interview both me and Emily, facilitate our first



Abby and Emily

meeting, and lay the ground rules for the trial stay was helpful," Abby said. "The trial stay was huge. That made me a lot more comfortable. I knew what I was getting into, and I knew it would be a good fit."

The two are compatibly introverted, so there's no pressure to hang out. They go out to dinner occasionally and go on walks together after work to decompress.

Abby is an avid reader and enjoys crafting, and you'll likely find Emily in the kitchen baking something that Abby is glad to be a tastetester for. Abby is a big fan of Emily's cookies or anything with chocolate. Another bonus has been how quickly Abby grew to love Emily's cat, Jinx.

Emily appreciates the continued positive experience of working with HomeShare

Vermont and the occasional check-ins to make sure everything is still going well. And Emily quickly realized sharing her home still improved her quality of life.

"Part of it was the money," Emily said. "It allows me greater flexibility to do fun things and to have more savings. But I really do like having a roommate. When I moved into my place, I went a good six or eight months living by myself, and I found I'm not great living on my own. I like having somebody else around. Not necessarily always talking or interacting, but just to have someone here."



his year, HomeShare Vermont celebrates our 40th anniversary. It is true that homesharing's time has come. Many Vermonters are struggling with the high cost of housing. Many others are liv-



ing alone and experiencing serious social isolation or having a hard time making ends meet.

I am excited that HomeShare has just completed an important Strategic Plan focused on serving more Vermonters and establishing an aspirational goal to expand our service area to cover the entire State of Vermont and offer the same personalized and comprehensive homesharing service to all Vermonters.

Please join with me to support HomeShare Vermont in whatever way you can – by sharing your home, volunteering, attending an event, donating or considering a planned gift.

If we all work together, we can assure that HomeShare Vermont will meet the challenges of the next 40 years.

Margaret Cicchetti, Board President





Annual Report July 1, 2021 – June 30, 2022

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United Way of Northwest Vermont



# A 40th Anniversary Interview with Sarah Carpenter

## Q What was your role with Home-Share?

A. I've known HomeShare for all of its 40 years! I was involved most when I became Executive Director of Cathedral Square Corporation in 1983 when we decided to act as the fiscal sponsor for what was then Proj-

ect Home and later became HomeShare Vermont. I also have a personal experience with HomeShare as my Mom shared her home through the program after my Dad died. Despite being pretty active into her 90s, it really helped her to have somebody in the house, helping her with errands and allowing her to stay in her own home. And I think it's just a fabulous option for folks that want that.

#### Q. How did HomeShare get started?

A. In the Cathedral Square building, we happened to house the Retired Senior Volunteer Program (RSVP) which was the original founder of HomeShare. When it came time to create a paid staff person, they looked for another sponsor. Cathedral Square saw the need for other housing alternatives and supporting a homesharing program really fit into our mission. Even though we built and managed senior housing communities, we knew that there were many people who wanted to stay in their own home. We supported HomeShare with office space, bookkeeping and technical assis-



tance and their director and advisory board oversaw the program.

## Q. Why do you think HomeShare is still thriving now 40 years later?

A. Well, the need is still there. In fact, the need has just grown as we have a more critical housing shortage and an aging population. From the support

side, but the financial side too, for many people it's hard to remain in your own home without some kind of support. By developing an intergenerational focus, HomeShare has also filled a much-needed niche for people who need or want just a rooming situation.

## Q. What do you think most people don't know about homesharing?

A. I think people don't understand the quality and the professionalism that's brought to the whole screening process. The paid staff has always been supplemented with volunteers who are retired professionals. Being seniors themselves, they understand the need to find the most appropriate and compatible matches and the reluctance that many seniors have to sharing their home with a stranger.

### Q. Any last thoughts you want to share?

A. Congratulations HomeShare Vermont on 40 years of homesharing! The fact that as a small nonprofit, it's still so successful just speaks volumes to the need and how it's been run!

## FY22 Return on Investment

In FY 2022, the State of Vermont provided \$123,200 in state funds and \$156,800 of matching federal funds to HomeShare Vermont. We are so grateful to the Vermont Department of Disabilities, Aging and Independent Living. That investment leveraged the following:

- By sharing their homes, Homeshare Hosts received over \$270,000 in rental income to help them make ends meet.
- Homeshare Guests provided almost **27,000 hours of assistance** to their Homeshare Host, helping with everything from yardwork to dog walking to sharing meals.
- The *average rent* of the 104 homesharing matches in our program was *only* \$340/month with 27% of matches paying no rent at all.
- Using the difference between market rents and actual homeshare rents, it is estimated that Homeshare Guests *saved over* \$450,000 in rental expenses this year.

## A JOY TO Come Home To

rant was a retired Delta Airlines field sales rep who traveled the world but called Vermont home. He bought eight acres of land in Fletcher around 50 years ago and created a peaceful sanctuary with rolling meadows and

postcard views of Mount Mansfield. So, no one blamed him for wanting to avoid moving into a nursing home and having to sell his home-his pride and joy. HomeShare Vermont helped him fulfill that wish.

Grant's main hope was to find someone who could help with the chores that he no longer could handle. He also liked the idea of offering a reduced rent to a struggling graduate student. After a long history of health is-

sues, Grant passed away in January at the age of 81, but not before benefitting from his second homeshare match.

Joshua, 21, was eager to strike out on his own after living with his family in Franklin County most of his life, but hoping to stay in the area. He came across an ad for homesharing with a senior gentleman needing some help around the house and was immediately drawn to the opportunity. With a passion for helping others, Joshua felt he could be a great fit and was eager to meet Grant.

Grant and Joshua hit it off immediately. Along with regular household chores, Joshua set up a playlist of Grant's showtunes so he could listen to them on Alexa. He also taught Grant how to use voice commands to create a grocery list whenever he

> needed something. Joshua even fixed the dishwasher for him.

> However, it wasn't just Grant who benefitted from the homeshare lasting impression on Joshua. "Living with Grant provided me some-

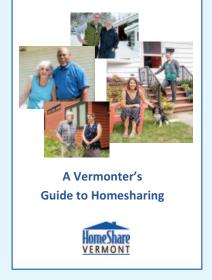
match. Despite only living together for about six months, Grant left a one I could look up to as a mentor. He was a positive light in life and a joy to come home to. No matter how my day had gone, I could always count on his witty humor to brighten my day."

**Joshua and Grant** Joshua still lives in Grant's home, providing a service to Grant's family, since none of them live locally. Grant's nephew, Chip, said it's nice having Joshua there to keep an eye on the place. He can be there to meet anyone if there needs work to be done. "All around, it's been a great experience. Clearly, they [HomeShare Vermont] take care to match the right people to-

all, we're very happy."

## Homesharing Guidebook Available

JomeShare Vermont just published the 3rd edition of a do-it-yourself guidebook to help Vermonters find a homesharer to live with them if they are outside of our service area. HomeShare Vermont serves Addison, Chittenden, Franklin, Grand Isle, Lamoille, Orange and Washington counties. While this service area has increased from one to seven counties over the last 20 years, we are not yet able to cover the entire state. The guidebook is one way we can help people to find and create 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.

gether and try to work it the best they can. It's a great program

for those who are in need on both sides of the equation. Over-

The guidebook, A Vermonter's Guide to Homesharing, is now available to download on the Resources page of the HomeShare Vermont website. Paper copies can also be requested by contacting the HomeShare Office at (802) 863-5625. The Guidebook was funded in part by a generous grant from North Country Credit Union.

## Volunteers Play a UNIQUE ROLE



olunteers have been a cornerstone of our service delivery since we opened our doors in 1982. This year, HomeShare Vermont benefitted from the assistance of seven dedicated staff volunteers. Working closely with Amy Jelen, Program Director, our staff volunteers assist with everything from interviewing new applicants to creating matches. Staff volunteers play a crucial role ensuring that our process runs smoothly and efficiently, and they bring a wealth of experience and knowledge to our screening and matching process.

This year we want to give a special acknowledgment to Radetta Nemcosky who has been volunteering with us for 10 years! Thank you Radetta and all staff volunteers!

### Thank you, Joan!

After retiring from a career in human resources, Joan Palmer came to HomeShare Vermont in 2013 looking to share her time and energy in a new way. For the past nine years, Joan has volunteered her time working directly with HomeShare program participants. She attended weekly case conference meetings, interviewed applicants, introduced potential matches and provided ongoing support to her matched Hosts and Guests. Joan says that these individuals will always be in her thoughts and bring fond memories, and the connections with the other dedicated volunteers have been so important to her.

Joan is retiring from her role as a Staff Volunteer. Her compassion and insight will be greatly missed!



## Thank you, Barbara!

Barbara Buchanan is an amazing volunteer who came to us from the United Way Volunteer Center. She has been volunteering with HomeShare Vermont two days a week since 2009. She helped us with the time-consuming task of reference checks on our applicants, both Hosts and Guests. With over 500 applications each year and 3-5 references for each person, that is a lot of phone calls, messages and return calls! During COVID, we didn't have volunteers coming into the office. This year, when everyone returned, Barbara, now 83, decided it was time to retire from volunteering. Over the years, Barbara completed thousands of reference checks and had spoken with people from all over the country. Thank you, Barbara!

## A Match Around the Corner

ichael, 73, has always been used to having people in his Morrisville home. It was the social hub on the street when his son was growing up. But after his wife passed away in late 2020, the house felt too big for him

and his two Cavalier King Charles spaniels, Kai and Chester. He was lonely, but at the same time he wanted to help someone else and give them the opportunity to share the house with him. He thought using HomeShare Vermont was the perfect fit.

Sam, 60, faced sudden housing insecurity a year ago that many have felt recently when his landlord decided to sell the home where he was renting. He never

considered looking for an apartment. He had been living alone for a while and liked the idea of sharing a home where he cared about the person he was living with. So, he put his trust in HomeShare's process.

It all worked out serendipitously for Michael and Sam. Michael's home was just around the corner from where Sam was living and they knew many of the same people, having lived and worked in the Stowe area for decades.

Oddly enough, Sam's son also used to hang out at Michael's house when he was growing up, and Sam recently worked with

Michael's son. Years ago, Sam and Michael's paths crossed occasionally when they both worked at the Trapp Family Lodge. They both were raised a similar way, having fathers who fought in WWII. And the two are homebodies who embrace the sim-

ple pleasures in life. It really is a perfect fit.

Michael likes the consistency of knowing someone is sharing his home. Sam's favorite part about the homeshare match is just spending time with Michael and the two dogs. They'll watch TV together or sometimes one of Michael's friends comes over and they'll all eat pizza and watch Beatles movies.

An added benefit is living with a musician. On gloomy winter days, Sam said it's nice to listen to

Michael play his guitar. Sam thinks it's fun to wipe the snow off Michael's car and watch him go about his day.

Michael's open-door policy at his home and Sam's various jobs at hotels and resorts where he worked and lived with a wide array of people, made it easy for them to share space and blend together to form a home.

It never even occurred to Michael that having someone new move in could be an adjustment. "It's just been so normal," Michael said. "Sam is like a brother. It was like a rebirth of the family."



## The Polly Rowe Society: A Legacy of Caring

Thanks to bequests received from Polly Rowe, Estelle Deane and others, HomeShare Vermont has been able to seed a growing sustainability fund called The Polly Rowe Fund.

HomeShare friends have also told us of their



plans to include HomeShare Vermont in their will or estate. We acknowledge the wonderful contributions of these and future donors with the Polly Rowe Society in memory of one of our inspirational founders

### **Members of the Polly Rowe Society**

Becky & Stewart Arnold
Roger & Barbara Buchanan
Peter Cameron
Margaret L. Cicchetti

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Libby Downer\*
Kirby Dunn

Natalie Hall
Helen Head & Tom Mercurio
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\* Gifts Received

For more information or to let us know of a gift you have made, please contact Kirby Dunn at (802) 863-5625.

## Accomplishments in FY22

#### What We Do:

Homesharing is a simple idea where two or more people share a home to their mutual benefit. The home can be an apartment, condominium, mobile home or traditional single-family house. A person offers a private bedroom and shared common area in exchange for rent, help around the house or a combination of the two. Every homesharing arrangement is unique; it depends on the needs, time, interests and abilities of the people involved. It differs from a typical roommate situation because, at its core, it is about two people helping each other.

### How We Do It: Our Screening & Matching Process

Processed **545** applications
Made over **1,300** reference checks
Performed over **1,800** background checks
Interviewed **286** new customers (many in their homes)
Facilitated **127** in-home introductions
Resulting in **197** matched participants!

### Who We Served:

Those Who	Shared Their Home	Found Housing
# of Individuals	96	101
Age Range	28-98	22-80
Average Age	70	50
% Low Income (H	UD) 74%	89%

## A Roadmap for the Future

fter a year's delay due to COVID, the HomeShare 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. Last Fall, nearly 45 surveys and phone interviews were completed with organizational partners, current and 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 then held an in-person strategic planning work session to review the survey and interview responses and to prioritize goals and strategies to be included in HomeShare's strategic plan for the next 4-5 years.

From the surveys, interviews and board retreat, two primary goals rose to the top:

## To increase the number of Vermonters who benefit from homesharing.

## To continue to grow and strengthen the organization.

The Executive and Outreach Committees then developed the following strategies to implement these goals:

■ Targeting our outreach and marketing to make people aware of the services we offer.



Front: Margaret, Radetta, Meg, Alison & Lis Back: Ingrid, Mary, Hobart, Frank, Kelly & David

- Increasing collaboration with other organizations, employers, colleges, 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.

The final plan was adopted by the Board in June and you can find it on the About Us page of our website along with a link to a 30-minute Zoom presentation that we did for our key stakeholders. Many thanks to everyone who gave us their time and suggestions!

## -FY22 Financial Report

July 1, 2021 - June 30, 2022



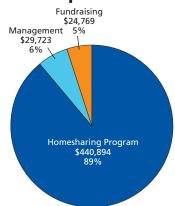
omeShare Vermont's finances continue to be strong and well managed with another year-end showing positive cash flow. With a new staff position added at the very end of the year, we will have to increase our income in FY23 to have a similar strong year-end show-

ing. The market downturn affected our investments in our Polly Rowe Funds, but we will weather this, as these are funds for the future. We want to thank our key partners, including the State of Vermont, the Amy Tarrant Foundation, the Hoehl Family Foundation, Cathedral Square Corp., and all our donors

listed on pages 10 and 11 of this report. We would not be here if not for your ongoing and generous support. By the way, our Finance Committee is looking for a new member with investment experience, so if you are interested in volunteering with HomeShare Vermont, please get in touch with us!

> Thank you, Brian Stark, Treasurer

## **Expenses**



Total expenses \$495,386 Net Assets increase \$41,466

## **Operating Income**

State & Local Government	\$ 290,600
Foundation Grants	120,000
Donations & Events	89,801
United Way	14,612
Donated Services	10,433
Match Fees & Interest	11,406

Total revenue \$536,852

Complete Audited Financial Statements for FY22 are available upon request.

## **WELCOME Anne & Ric**

HomeShare Vermont is pleased to announce the addition of two new members to our team.

Anne Farley of Wolcott has joined the HomeShare Vermont staff as a Case Manager to help more neighbors in Central Vermont experience the benefits of homesharing. Anne comes to HomeShare with a wealth of social service experience, most recently working with the Family Center of Washington County and the Lamoille Family Center. Anne found housing as a homesharer herself many years ago and had a successful match with an older woman in Barre.

Ric Cengeri is our new Communications Specialist, responsible for providing information about HomeShare Vermont, its programs and activities to the media and the public and for telling the HomeShare story. Ric was most recently the host of Vermont Viewpoint on WDEV Radio in Waterbury. Prior to that, he was a producer for Vermont Edition at Vermont Public Radio and the morning show host at The Point in Montpelier.



Staff: Joyce, Kathy, Kirby, Anne, Ric, Amy



## CELEBRATING 40 Years



n April, HomeShare Vermont hosted our 40th Anniversary Celebration at the Double E in Essex. The highlights of the evening were amazing music and stories and wonderful goody bags, cupcakes and bubbly beverages. The best part was being out for a night with friends and seeing people we haven't seen in ages, despite still having to wear masks! Those from away or those who didn't want to venture out were able to watch a live stream of the evening thanks to our media partner, The Media Factory.

The three amazing storytellers, Kevin Gallagher, Susanne Schmidt and Tom Baginski shared funny and heartwarming stories. Video stories from our homesharers Arthur





Brooks and Theresa Mazza gave everyone a sense of the magic of homesharing. Thanks to Becky Arnold, Kate Baldwin, Sarah Carpenter, Nick Danigelis and Helen Head, who shared memories of the early days of then Project Home. Interspersed between the stories were great songs by the band, The Brevity Thing, which featured Dave Ball (guitar, harp), Jom Hammack (mandolin), Steve Goldman (upright bass) and Sue Schmidt (drums).





Thanks to the generous sponsorships and ticket sales, we raised over \$28,000 for our homesharing program.

Each attendee got an amazing goody bag with items from Cabot Creamery, Green Mountain Nuts and YOLO snacks, followed by an amazing and delicious display of cupcakes from Superb Cupcakes of Williston.

Special thanks to the 40th Anniversary Committee led by Meg Pond for organizing such a fun and successful event: Margaret Cicchetti, Mary Harwood, Katherine Orthman, Leisa Pollander and Kathy Shirling.

### Thanks also to our Event Sponsors:

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The Vermont Housing & Conservation Board
Margaret & Bert Cicchetti
Vermont Housing Finance Agency

## ——Highlights of the 40 Year History of—

## **HOMESHARE VERMONT**

....1991







First Outcomes study

2001 .....

No Place Like Home, a five-year study by Nicholas Danigelis & Alfred Fengler, is published



## conducted



to HomeShare Vermont

The Polly Rowe Memorial Fund is started



#### 2003

HomeShare Vermont expands into Grand Isle County



#### 2005

HomeShare Vermont becomes an independent non-profit corporation



HomeShare Vermont expands service area into Addison County



#### 2007 .....

Capital Campaign completed and purchase of our new office in South Burlington

#### ....2014

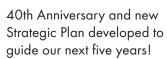
HomeShare expands into Franklin County



## 2018.....

A Resource Guide for Establishing a New Homesharing Program is published

#### 2022





### 2019.....

HomeShare Vermont expands into Lamoille, Washington and Orange Counties and opens a satellite office in Montpelier















Thank you to our donors at all levels of giving who have faithfully supported us this year (July 1, 2021 to June 30, 2022).

\*Signifies donations to the Polly Rowe Fund

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#### \$15,000 & above

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State of Vermont, Department of Disability, Aging &

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Beth Tanzman & Craig Murray Charles & Joan Tetzlaff

If we have omitted anyone or included anyone who would prefer to be anonymous, it is unintentional, and we would appreciate your notifying the Home-Share Vermont office. Anyone who contributed after June 30, 2022 will be acknowledged in next year's annual report.

We wish to acknowledge Futura Design for the design of this Annual Report and HomeShare Vermont's other printed pieces.

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.



**United Way of** Northwest Vermont



## **Contributions have been given in memory of:**

Estelle Deane Ellen & Bill Drislane Mark Thomas Eldridge Sten Fersing Dorothy Howe Margaret Hutchins

Ed & Ione Keenan Kay Mowen Ronald Nemcosky Betty & Ron Reed Polly Rowe Mildred Schaeffer

Donna Petterssen





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## FY22 HomeShare Vermont's Outcomes

## We Are Better Off Together Than Alone!

Cince 2001, HomeShare Vermont has conducted outcomes surveys Our survey uses results-based accountability (RBA) methodology to with matched participants and the findings have consistently shown benefits to those sharing their homes (Homeshare Hosts) as well as to those who found housing (Homeshare Guests).

assess whether matched participants benefited from our program and, if so, in what ways. This year we again surveyed participants in matches as of April 1, 2022 and we had an 89% response rate.

	Unduplicated # of Persons in Match	197	
How Much?	# of Housing Units Created	117 homes available to share	
Much?	# of Service Hours Exchanged	27,000 hours of assistance to seniors & others	

	HomeShare Average Match Length	19 months
How	Participant Satisfaction	95% very satisfied
Well?		100% would recommend us to family or friends

Is Anyone Better Off?	Affordability of Housing	Average Rent: \$340
	Ability of Seniors & Others to Stay Safely at Home	50% of those sharing their home reported they would not be able to live safely and and comfortably at home without a homesharer
	Improved Quality of Life: Those having someone live with them report they	Feel Less Lonely: 80%
		Feel Happier: 73%
		Feel Safer in their Home: 83%
		Sleep Better: 55%
		Feel Healthier: 45%