



MEMORANDUM

Date: August 30, 2022

To: The Honorable Chair and Members
Pima County Board of Supervisors

From: Jan Leshner 
County Administrator

Re: **Contract for Development of a HomeMatch Program – End of Year Report**

In August 2021, Pima County entered into a one-year contract with Pima Council on Aging (PCOA) to contribute up to \$100,000 towards research and development of a new home sharing program for older adults. Attached is the End of Year One report and \$83,333.33 was expended. While PCOA had initially anticipated a program start date within 2022, research conducted both locally and nationally resulted in a revised timeline that recognizes the additional time it takes to fully develop a quality program that incorporates best practices, both legally and administratively.

PCOA hired a Home Sharing Coordinator and Director of Community Initiatives, established a web page at <https://pcoa.org/ways-we-help/homematch-pima.html/>, and received interest from 60 potential home sharers with whom they regularly communicate with and seek input. In addition, PCOA staff have been learning from local and national experts, including the National Shared Housing Resource Center, as well as community partners serving low income and minority older adults. There appears to be much interest in the proposed program and PCOA's reports show the level of detail necessary to develop and operate a quality program at a time where affordable housing options are sorely needed and social isolation for older adults has grown even worse during the pandemic.

While Pima County's investment in the development of this program has come to an end, PCOA will continue to provide periodic updates on what will hopefully be an active and successful program within the next couple of years. PCOA also submitted quarterly reports that can be made available upon request.

JKL/anc

Attachment

c: Carmine DeBonis, Jr., Deputy County Administrator
Francisco Garcia, MD, MPH, Deputy County Administrator & Chief Medical Officer
Steve Holmes, Deputy County Administrator
Dan Sullivan, Director, Community and Workforce Development

HomeMatch Pima at Pima Council on Aging: End of Year One Report

Summary of Year One Activities for HomeMatch Pima at Pima Council on Aging

The HomeMatch Pima (HMP) team is listed below, and we have had a busy year learning how to develop a pilot homesharing program in Pima County. This report summarizes our learning in four major areas: from Pima County Residents, from national programs seasoned in offering homesharing programs, from local experts, and from our community partners.

PCOA Executive Leadership and Staff Members Involved in Year One HomeMatch Pima

- W. Mark Clark, CEO and President
- Lisa Reams, Vice-President of Programs and Services
- Lana Baldwin, Vice-President of Philanthropy and Communications
- Victor Quiros, Vice-President of Operations
- Maddy Bynes, Director of Public Policy and Special Projects
- Deb Seng, Director of Community Initiatives
- Linda Travis, Homesharing Coordinator

Learning from Pima County Residents Interested in Homesharing

Throughout year one, HMP was contacted directly by 60 people interested in homesharing as an option for themselves. Here is the breakdown by quarter of the number of people:

HMP Year One overview, by quarter, of people reaching out to HMP:

Q1: July-September total is 11 people **(18.3%)**

Q2: October-December total is 3 people **(5%)**

Q3: January-March total is 18 people **(30%)**

Q4: April-June total is 28 people **(46.7%)**

The 60 people in Pima County reaching out to HMP were comprised of homeowners (68%), homesharers (20%) or unknown status (12%). We want to share five highlights about this group of people. First, there is a range of ages for homeowners showing interest in the program. That age range includes people in their early 60's to their early 90's. Second, we know that some participants identify as White while others identify as people of color with a variety of ethnicities and races represented. Third, we have learned of a clear interest from the LGBTQI+ community in Tucson and Pima County. There are also people identifying as cisgender female and male, as well as others reluctant to discuss gender identities. Regarding incomes, some self-report being "poor" while others describe themselves as middle or upper middle class. Finally, we have heard from people with identifications of Jewish and Christian faiths as well as others either saying "no comment" or expressing no interest or an aversion to religion, spirituality, and faith.

In keeping with information from National Shared Housing Resource Center (NSHRC) there are three preferences/dislikes topics expressed by many people. These preferences/dislikes in living with another person are 1) smoking (yes/no); 2) pets (yes/no); and 3) pandemic safety practices and beliefs (people overall want to live with those sharing their beliefs, practices). A desire for shared religion and faith beliefs are another preference expressed by people. Finally, Arizonans tend to have strong beliefs about interest in having/not having firearms in a home. These five areas are *not* the final determinants for a homesharing match. However, they may function as a “Tier I” sorting variable for HMP staff exploring possible home matching options in the future.

HMP seeks to understand not only the people interested in the program, but also home properties of homeowners. To date, we have heard from people in mobile homes, manufactured homes, and free-standing homes located throughout Pima County.

Our learning from Pima County Residents has taken place in phone calls and HMP program introductions with 60 people. The Homesharing Coordinator also checks in with people every two months (or sooner as some check in with questions) in order to keep people engaged in the development of HMP. Interestingly, many people are not in a hurry to “get matched” due to concerns about COVID, especially as related to having someone else in their home.

We also learned from Pima County residents when they attended our HMP Interest and Connections sessions. Most recently, we have hosted Interest and Connections sessions in June, with three more sessions planned in August. The June sessions provided an opportunity for HMP team to learn from participants and for participants to learn from one another. Participants attending the sessions included homeowners (56%) and homesharers (44%).

We also heard from people throughout this year that they were open to not only homesharing but also interested in learning more about co-renting situations. A few people are interested in having more than one homesharer in their home at a time. We have also had inquiries from some that were primarily interested in living in communal-type settings or want information about options for group co-ownership of homes. Others are interested in “tiny homes” as an option. It is truly a “new day” for older adults embracing housing options!

Details of our marketing efforts in the first year were detailed in previous quarterly reports. Briefly, those efforts have included 1) monthly articles in *Never Too Late* (NTL), PCOA’s monthly newspaper; 2) HMP has a webpage on the PCOA website (HomeSharing.pcoa.org); 3) staff at PCOA, including Helpline staff and Rights and Benefits team; and 4) ongoing meetings and collaboration with PCOA community partners, especially those organizations serving older adult minority groups in Pima County.

Finally, there were an additional 23 people contacting HMP in the first year. Those people were not placed on the HMP participant list as they needed crisis/emergency housing (4), they owned multi-unit housing and were looking for inroads and access to prospective renters through HMP (5), they owned an individual property and wanted to rent out that property/*not homeshare* (6), they were real estate agents in property management roles offering to help

people connect with rental opportunities (3), and family members wanting information about HMP (5). These groups of people were encouraged to continue to visit the PCOA website in general, and HMP page in particular, for program updates and plans as well as to review monthly articles in *Never Too Late(NTL)* for updates. *NTL* is PCOA's monthly newsletter.

Learning from Established and Successful Homesharing Programs Offered in Other States

Researching best practices of homesharing programs throughout the country was primarily concentrated in the timeframe of October 2021 through January, 2022. With the help of the National Shared Housing Resource Center (NSHRC), the HMP team was able to locate established and successful homesharing programs offered in other states. The useful and informative conversations with these programs helped the HMP team begin to consider many aspects of homesharing best practices that were previously unknown. In the domain of best practices for homesharing programs, there are several components in program development: application materials for home provider and home seeker, background checks, database decisions, program processes, and regulatory laws or guidelines (legal, housing, tax, insurance, fair housing). In addition to learning about best practices for homesharing, the HMP team became aware of the reality that homesharing is a high touch, human endeavor. This high-touch feature, across all aspects of program development and processes, is a key to success in other programs. HMP staff also learned that most homesharing programs “open their doors” for matches after two to three years of preparation and planning. Those timelines were further extended by COVID-19, as homesharing no longer felt “safe” to many older adults.

Learning from Local Experts about Homesharing in Arizona

From research on best practices and discussions about “lessons learned” with homesharing programs throughout the country, we learned something we did not anticipate. Although there is much variability in homesharing programs, a central, common focus across programs is the importance of understanding if/how homesharing programs fall under the umbrella of state specific landlord-tenant laws. We engaged a local legal expert in landlord-tenant law in Arizona. Briefly, our investigations resulted in confirmation that homesharing is under the umbrella of Arizona landlord-tenant laws as related to owners of community homes as well as to mobile homes. This important step in program development will eventually help PCOA to inform homeowners about the need to follow laws regarding security deposits, safety, and eviction procedures and to refer homeowners to professionals well versed in property taxes, personal taxes, zoning and ordinance matters, home inspections and insurance, and more. The need for an advisory council made of experts was identified early in the phase of best practices research. The composition and focus of an advisory council, especially with attention to Arizona law, will commence in the summer of 2022. The outcomes from this advisory council will inform the HMP program development. In summary, we are committed to obtaining a thorough understanding of these matters so that we can clearly communicate the rights and responsibilities of landlords and tenants to our participants as part of the application processes and to provide them with resources to explore these matters for each unique situation.

To our knowledge, HMP is the first homesharing program in Arizona. Thus, we are learning about the necessary legal groundwork to a degree not previously known or anticipated by all in support of our homesharing program. Our learning will be useful to other homesharing programs as part of our larger sustainability plan to advocate for additional homesharing programs in Pima County and throughout Arizona.

Learning From Our Community Partners

Given our intended focus to understand the unique concerns of low income and minority older adults as they consider homesharing, we knew our best practices research must include unique considerations pertaining to these underserved groups. We quickly learned that not all homesharing programs are designed with attention to older adults in general, nor with attention to low income and minority older adults, in particular. As many older adults often receive income from various federal, state, VA or other programs, it is imperative to grasp possible “benefit collusions” that may inadvertently arise in homesharing situations. For example, an increase in income or a change in home occupancy for a homeowner may jeopardize, in part, that homeowner’s income received from programs, such as SSI. The HMP Homesharing Coordinator and team brought awareness, knowledge, and skills of these situations. The HMP team wants to inform homeowners and homesharers of the need to inquire about if or how their benefits could be impacted by homesharing. We are not stopping there, however. The HMP Team is also furthering community partnerships and identifying specific professionals that understand HMP and are available to talk through unique benefit questions and scenarios with applicants. The expertise from our community partners is an invaluable resource for our program development and in turn, those partners can help refer people to our program in the future. Our goal is to provide transparency to applicants so that they can make the best decisions, based on discussions with experts, for themselves.

One key local contact in this area is Jack Burns, the Public Affairs Specialist for Arizona Social Security Administration. Jack has agreed to be a contact person for our applicants to discuss their unique benefit situations. We will also be following up with the Pima County Tax Assessor office as well as with the United Way of Tucson and Southern Arizona (Financial Wellness Program with tax resources) to secure additional referrals for homeowners as related to questions regarding property or income taxes, respectively, in relation to homesharing. It is well known that serving low income and minority older adults must include transparency and trust to secure engagement and program participation. It is also critical to seek ongoing feedback from colleagues working directly with these minority groups. Upon sharing our ideas and efforts about benefit concerns and resources with two groups serving low income and minority older adults, we received feedback that this type of carefulness and “going the extra mile” will make a difference. The feedback was offered by leaders at the Las Comadritas Program at the YWCA of Southern Arizona (Hispanic older adults) and at Senior Pride (LGBTQI+ older adults).

As PCOA follows person-directed care models, we listen to learn and want HMP to be impactful for low income and minority older adults. Often marginalized by an array of systems

throughout their lives, our prospective applicants may be wary of HMP. Thus, our collaboration with community partners serving low income and minority older adults is essential to build trust. Our high-touch approach coupled with cultural humility is evident throughout our processes and outcomes.

Conclusion

There is tremendous need for HMP as an important option in Pima County to address the unprecedented shortage of affordable and safe housing in the City of Tucson for low income and minority older adults. With this priority in mind, we have traversed through learning in expected and unexpected learning throughout this year as we develop our pilot program in homesharing. It is evident that HMP will only succeed through collaboration with community partners and national colleagues with expertise in homesharing. We are enormously grateful for your support and patience in our learning and our goal to create a quality program for Pima County. Thank you!