



**SACRAMENTO  
HOUSING AND REDEVELOPMENT  
AGENCY**

*Agency Rpt*



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**APPROVED**  
SACRAMENTO HOUSING AUTHORITY  
CITY OF SACRAMENTO

SEP 25 1984

**APPROVED**  
BY THE CITY COUNCIL

SEP 25 1984

OFFICE OF THE  
CITY CLERK

CITY MANAGER'S OFFICE  
**RECEIVED**  
SEP 19 1984

Housing Authority of the  
City of Sacramento  
Sacramento, California

Honorable Members in Session:

SUBJECT: Evaluation of Seniors Allied in Living (SAIL) Program

SUMMARY

The SAIL evaluation was prepared by the Agency Planning and Evaluation Division in the context of its annual evaluation of programs operated and or funded by the Agency. Based on this evaluation, staff has concluded that the program warrants continued funding under the Community Development Block Grant program.

BACKGROUND

The attached evaluation was completed by Agency staff in December 1983. Originally it was intended that this as well as several other program evaluations would be updated and consolidated and proceed to the Governing Boards at one time. However, since a determination must be made as to whether the SAIL program is to be recommended for refunding in the 1985 CDBG program, it has been determined to present this evaluation at this time and to update it with 1984 data next year.

The SAIL program is operated out of the Community Services Division. The program provides an additional housing service to the community by matching individuals who are seeking homes with elderly householders. The program is meeting its goals and objectives and compares favorably in number of matches, costs per match and staffing levels with other shared housing programs operated in the United States.

9-25-84  
All Districts

# SACRAMENTO HOUSING AND REDEVELOPMENT AGENCY

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Since the program evaluation was performed, upon retirement of the previous Program Manager, the program manager has been replaced. The new Program Manager has further streamlined the program and is currently computerizing the match process. The SAIL program's large data base and its reporting requirements are ideal for the computer application.

The SAIL program has also received \$50,000 (\$25,000 each year for two years) from the State Department of Housing and Community Development under the SB 19 Shared Housing Program for partial financing of two part-time community services specialists. Under this pilot program, SAIL's two year goal is to match 500 seniors.

## ENVIRONMENTAL REVIEW

The recommended actions do not require environmental review.

## POLICY IMPLICATIONS

The action proposed in this staff report are consistent with previously approved policy to regularly evaluate Agency programs.

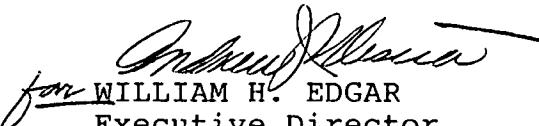
## FINANCIAL DATA

The recommended actions have no financial impact on the Agency.

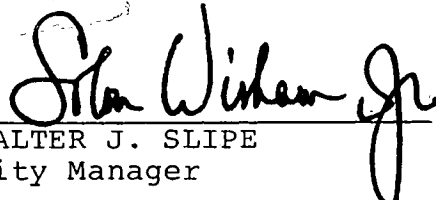
## RECOMMENDATION

Staff recommends that you approve the conclusions and recommendations outlined in the staff report, and direct staff to include funding for this program in the 1985 CDBG program.

Respectfully submitted,

  
for WILLIAM H. EDGAR  
Executive Director

TRANSMITTAL TO COUNCIL:

  
for: WALTER J. SLIPE  
City Manager

EVALUATION OF SHARERS ALLIED IN  
LIVING (SAIL) SHARED HOUSING PROGRAM

(For The Period July 1, 1982-June 30, 1983)

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EVALUATION OF SHAREPS ALLIED IN LIVING (SAIL)  
SHARED HOUSING PROGRAM

I. DESCRIPTION OF PROGRAM

The Sacramento Housing and Redevelopment Agency's Shared Housing Program, currently known as the Sharers Allied in Living (SAIL) Program, evolved from the Seniors Allied in Living Program which began operation in 1981. The Community Development Block Grant (CDBG) funds set aside for the SAIL program in 1982-83 enabled the Agency to continue providing shared housing services in the community when the Seniors Allied in Living Program, a private and Federally financed non-profit shared housing program, lost its financing and was forced to terminate its operations.

The SAIL Program is currently financed with both CDBG and Department of Housing and Urban Development Conventional Housing funds. The former program provides approximately 80% of the financing with the latter financing source making up the balance. The SAIL staff consists of a Program Manager, a half-time Community Services Coordinator and a part-time clerk. An Area 4 on Aging Grant awarded for FY 1983-84 has also allowed for financing of an additional quarter-time Coordinator position. Volunteers are starting to be utilized more frequently to supplement services provided by SAIL staff.

The SAIL program processes approximately forty to fifty new clients each month. Over 300 calls are received; many of the individuals are referred to more appropriate agencies when it is determined that shared housing is not precisely what is desired or needed. The program operators assess each applicant, using over 80 elements of analysis to describe needs, preferences, capabilities and expectations, as well as physical aspects of the home. (See Application Appendix A). Meetings are scheduled between those individuals whose characteristics indicate they may be compatible. The SAIL role during matching is that of facilitator. Once clients decide to share a home, this role changes to that of counselor and advisor for as long as the clients feel they need such help.

II. OBJECTIVE OF PROGRAM

The objective of the SAIL Program is to bring together people who are voluntarily seeking shared living arrangements in private homes. At least one member of each pair or group must be on a limited income. Efforts are particularly focused on the elderly and disabled. About three of every four applicants are "householders", who own or rent a residence and wish to share it with another. The balance of the applicants are "homeseekers", those who are looking for a home to share. The chief reasons given for homesharing are loneliness, limited income, declining health and insecurity due to neighborhood crime.

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III. NUMERICAL GOALS

A target of 70 matches was established for the program during its first year of operation. The goal was achieved and exceeded with 87 matches or 124% of the objective.

IV. PROGRAM BUDGET

DEPARTMENT: Housing		ACTIVITY: Community Services Shared Housing	
ITEM	Actual 1982 Budget July-Dec	1983 Budget	
EMPLOYEE SERVICES	\$13,739	\$44,487	
OTHER SERVICES AND SUPPLIES	1,212	6,620	
EQUIPMENT	-0-	-0-	
OPERATING TOTAL	\$14,951	\$51,107	
DISTRIBUTED OVERHEAD	-0-	7,795	
1982 BUDGETED FUNDING	\$14,951	<u>\$58,902*</u>	
ADDITIONAL FUNDS REQUIRED	\$ 3,606		
TOTAL EXPENSES INCURRED	<u>\$18,557</u>		

	1982 ACTUAL EXPENDITURE	1983 ESTIMATES
SOURCE OF FUNDS:		
CDBG - City Carry-over		
CDBG - City - Current Entitlement	\$ 15,438	\$ 15,321
HUD Conventional Housing	2,302	17,000
Local Tax	<u>817</u>	<u>14,294</u>
TOTAL	\$ 18,557	\$ 58,902

\* As of June 30, 1983, \$27,395.61 or 47% of the 1983 program budget has been expended. Therefore, the total fiscal year 1982-83 expenses equal \$45,952.61 (\$18,557 plus \$27,395.61). Of this amount, approximately 80% of the budget is financed with CDBG funds.

V. EVALUATION CRITERIA

1. PROGRAM OBJECTIVES

Have the established numerical goals been met?

2. PROGRAM OPERATION

- a. How many matches have been made?
- b. What is average length of time to make a match?
- c. How many applications/individuals on waiting pool/list?  
What are the demands?
- d. Does difficulty exist more in matching individuals to  
available housing units or locating housing for homeseekers?

3. CLIENT PROFILE

- a. Age
- b. Sex
- c. Ethnicity
- d. Income Range
- e. Physical Health
- f. What is the average tenure of the individual in the match?
- g. What is the cause of breakup? Differentiate reasons for  
termination (medical, school, personality).

4. OUTREACH/FOLLOW-UP

- a. What processes were used to disseminate information on this program?
- b. Are follow-up interviews held? How regularly? How effective are they?
- c. What efforts have been made to train/develop self sufficiency for administration of the program by non-profits (service groups, churches, etc.)?
- d. What attempts have been made to tie in/complement existing housing programs?
- e. Has advisory council been established? What is its role/objective? Has it been met?
- f. How are complaints handled?

5. STAFF/COST CONSIDERATIONS

- a. Is sufficient staff service available?
- b. What is the administration cost per month? Is it reasonable? Comparable?
- c. What financing options have been investigated to replace or supplement public funds?

VI. OBSERVATIONS

1. Program Objectives

Question

1a. Have the established numerical goals been met?

Observation

The target number of matches is 70. This target number was exceeded by 17 matches or a total of 87 matches (124% of the objective). The 87 matches involve 189 individuals. An additional goal of the program was private counseling and referrals to at least 600 individuals. The program operators far exceeded this goal by serving 786 people or 131% of their target. (See Annual Data Report Appendix B for complete breakdowns).

2. Program Operations

Question

2a. How many matches have been made?

Observation

See above.

2b. What is the average length of time to make a match?

Observation

The Community Service Coordinator expends an average of 19.6 hours per match. The householders average nine weeks from time of application to match while the homeseekers average is approximately three weeks. (These figures reflect first matches only. For those clients with subsequent matches the "average" match times are understandably increased).

2c. How many individuals are on file waiting for placement?

Observation

Householders:

At the end of July 1982, the first month's operation, 87 individuals were in the active files. This number gradually increased (with strong correlation between new applicants and outreach efforts) throughout the program year. There were 191 individuals in this category at the end of fiscal year 1982/83. The average number of individuals in the active files at the end of each month is 176 and the average number of new clients received per month is 32. The total number of new applicants throughout the year was 392.



**Homeseekers:**

At the end of the first month's operation, 18 individuals were in the active files. This figure is approximately half of the number which were active at the end of the fiscal year from July 1982 to June 1983. A steady increase can be shown throughout the year. The average number of active files at the end of each month for the first 6 months of the year was 37 compared with 63 the last six months. The average number of new clients received per month throughout the year was 22. An update of the homeseekers files performed in both December and June helped the program operators obtain a more realistic picture of the actual number of clients still in need of assistance.

(See Annual Data Report, Appendix B for complete breakdown).

- d. Does difficulty exist more in matching individuals to available housing units or locating housing for homeseekers?

**Observation**

As suggested by the program operator, "Difficulty exists in finding appropriate individuals to match with householders and householders who will accept the people who are looking for homes. Most householder applicants are elderly, mainly women, who have lived in their homes for many years. They are unable to contemplate leaving these homes, and most could not afford any other housing anyway. Their expectations of anyone who might share the home are usually unrealistic."

**3. Client Profile**

**Question**

3a-e Age, Sex, Ethnicity, Income Range and Physical Health Profiles for Homeholders and Homeseekers.

**Observation**

See breakdown on following page.

**CLIENT PROFILE**

	HOUSEHOLDERS		HOMESEEKERS		
	NO.	%	NO.	%	
<b>AGE</b>					
- 74	108	29	35	9	
65-74	80	21	35	14	
60-64	49	13	18	7.25	
- 60	113	30	135	54	
Not Stated	25	6.6	25	10	
	Subtotal	375	Subtotal	248	TOTAL 623
<b>SEX</b>					
Male		21%		43%	
Female		79%		57%	
<b>ETHNICITY</b>					
White	96	81%	75	75	
Black	18	15	8	8	
Hispanic	1	0.8	15	5	
Asian/Pacific	2	1.6	2	2	
Alaskan/Indian	1	0.8	0	0	
	Subtotal	118	Subtotal	100	TOTAL 218*
<b>INCOME</b>					
0	11	3.4	33	12.5	
- 80%	59	18	14	5	
50-80%	50	15.5	21	7.9	
- 50%	112	35	111	42	
Not Stated	99	31	85	32	
	Subtotal	321	Subtotal	264	TOTAL 585*
<b>PHYSICAL HEALTH</b>					
Good		59		66	
Fair		31		25	
Poor		10		8	

\* Data Collection for this category commenced in February, 1983.

\*\* Income is recorded by client; one client record includes spouse or family, hence the numbers under income are smaller than the numbers in age.

Question

3f. What is the average tenure of the individuals in the match?

Observation

The average amount of time in a match for clients whose matches have terminated their matches is 4.1 months. For those individuals still in a shared housing situation as of June 30, 1983 the average is 4.84 months.

Question

What is the cause of the breakup? Differentiate reasons for termination (medical, school personality).

Observation

	Householder	Homeseeker	Total	%
1. Medical	10	6	16	26
2. School		5	5	8
3. Personality	18	23	<u>41</u>	66
			<u>62</u>	

1. Medical reasons included: need for skilled care, death, stroke, alcoholism and senility.
2. School termination cases included: classes ended and homeseekers return to school in other locations.
3. Personality reasons were varied reasons given for termination of two or matches each included: left without notice; failed agreement; misunderstanding; eviction; returned to family; disagreeable; unstable; harassment; and marriage.

#### 4. Outreach/Follow-up.

##### Question

4a. What processes were used to disseminate information on this program?

##### Observation

The following methods were utilized to market the SAIL program: 1) Brochures were widely distributed to agencies, interested persons, at workshops and at public assemblies; 2) Flyers were posted at schools, senior centers and agencies and were updated for each event concerning the program, i.e., TV presentations and housing seminars; 3) Median publicity included four TV and two radio announcements, approximately 6-8 articles in newspapers of general circulation, Senior Citizen Weekly and newsletters to various agencies; and 4) An average of four presentations were made each month to agencies, senior centers, churches and other groups dealing with the elderly and disabled.

##### Question

4b. Are follow-up interviews held? How regularly? How effective are they?

##### Observation

Counseling services are offered to the homeseeker and householder at the time the match is made. At this time, it is recommended that both the clients complete a Homesharer's Agreement which outlines their individual responsibilities in the living arrangement. A sample agreement and assistance is provided by the program operators. A follow-up phone call is later made one month after the match has commenced to see how it is working out. The match status is also updated each quarter. However, the quarterly update is completed more for statistical purposes than for follow-up counseling.

The program operators indicated that the clients who are seriously interested in receiving counseling request assistance early in the match. If counseling is requested, the program operators will offer to meet with both individuals together to help resolve their difficulties. The most common complaint is that the other individual is not honoring his/her match agreement. The program operators have found that usually the individual complaining is not interested in having the program operators find a new match who will better meet his/her expectations. In three cases the individuals actually did try to resolve their differences. Only in one of these three instances did the reconciliation work and allow the individuals to remain together on an amicable basis.

**Question**

- 4c. What efforts have been made to train and develop capabilities with non-profit community groups (e.g., service organizations, churches, civic and neighborhood associations) to operate a financially self-sufficient shared housing program which does not require public subsidy?

**Observation**

Due to staff time constraints, opportunity did not exist to initiate these steps. Efforts were made, however, to increase the scope of the program by organizing group shared housing arrangements. All three attempts proved unsuccessful due to lack of interest on the part of the homesharers. (Note: Research on other shared housing programs show that successful group housing arrangements usually require the liaison of several non-profit groups, financial support during the beginning of the program and considerable time to develop).

**Question**

- 4d. What attempts have been made to tie in/complement existing housing programs?

**Observation**

The following steps were undertaken:

1. SAIL flyers were expressly designed for Section 8 applicants and made available to them at the counter of the Section 8 application office.
2. SAIL flyers, brochures and personal liaisons were used to keep the colleges informed about housing opportunities for students each semester.
3. SAIL coordinates with In Home Supportive Services, General Assistance and Elderly Assessment Program to bring together potential homesharers.
4. The SAIL Program Manager works with the Commission on Aging to promote housing for the elderly, i.e., second-unit legislation.
5. SAIL works closely with the California Department of Aging's Housing Coordinator and the California Department of Housing's Shared Housing Coordinator.
6. The SAIL Program manager is a member of the Training and Supervision Committee of the Homemaking/Housekeeping Task Force for Sacramento County.

#### Question

- 4e. Has an advisory council been established? What is its role/objective? Has it been met?

#### Observation

Since the formation of the advisory group in March of 1983, it has met a total of three times, i.e., in March, June and July. In the future, meetings will be scheduled on a quarterly basis. The 12 member board's role is to provide support and direction to SAIL staff by assisting in three main areas: 1) publicity; 2) community liaison; and 3) fundraising.

The members represent concerned citizens, clients and various community groups (i.e., the Red Cross, Camellia City Center, Lutheran Social Services).

At this point, the advisory council's time has been exclusively involved with forming the council, i.e., the development of by-laws and elections. Therefore, to date the major objectives of the council have not been met. This situation should be resolved in the future, however, now that the preliminaries are out of the way.

#### Question

- 4f. How are complaints handled?

#### Observation

Only one complaint about the program operation has been received. The problem stemmed from the homesharers failure to complete all the steps of the matching process. Compliants about fellow homesharers are handled by counseling the individuals to communicate openly with one another. Appointments are scheduled with the staff and homesharers to meet and discuss the problems and to assist them to resolve their differences.

5. Staff/Cost Considerations

Question

5a. Is sufficient staff service available?

Observation

The SAIL staff consist of a program manager, a half-time Community Services Coordinator and a part-time clerk. An additional part-time coordinator position has been funded for FY 1983-84 from the Area 4 on Aging. This level of staff is consistent with other shared housing operators surveyed throughout the country by the Gray Panthers in May 1983.

Their survey shows that the majority of the programs had 1 1/2 staff people (either 3 part-time workers or 1 full time worker and one part time worker) and a few volunteers. However, one very successful operation had as many as 6 full time staff people and 15 volunteers.

Question

5b. What is the administrative cost per month? Is it reasonable? Comparable?

Observation

The average cost per match is \$528.19 (\$45,953/87 matches) and the average cost per individual served is \$243 (\$45,953/189 individuals). See Section VIII of this evaluation for comparison with other shared housing programs in operation throughout the country.

VII. CLIENT SURVEY

In an effort to obtain feedback on the SAIL Program for existing clients, questionnaires were sent to the 54 individuals or 26 matches that were currently participants of the program. (See Questionnaire, Appendix C). Out of the 26 matches who were sent questionnaires, 11 or 42% responded. Of those who completed the questionnaire, 64% were householders and 36% were homeseekers. Only 64% of the matches were still in existence.

Of those who responded, 73% indicated the service was good and 27 the service was fair regarding the length of time it took to make the match. All responses rated the service as good pertaining to the courtesousness of the program staff and pre-match counseling. Only one individual indicated the post-match counseling was poor. A number of individuals all responded the service was good. A number of individuals, however, failed to respond. Two recommendations were provided for improving the matching process: 1) more information should be provided to clients about the medical limitations of the homesharers in advance of the match, and 2) the individual responsibilities of both homesharers should be more clearly established prior to the match. (Note: Currently SAIL informs each client in a proposed match that what SAIL know about the medical limitation about each client must be shared with the other client. If a client does not wish to share such information he/she knows SAIL staff must do so).

All individuals responded that they would recommend the program to others. Finally, a question posed as to what the service was worth to them was answered by the 11 individuals who completed the questionnaire as follows: 5 individuals (45%) left the question blank, 2 individuals (18%) indicated that they felt the service was worth payment (\$25 and \$10 respectively), 1 individual (9%) indicated "none" and 3 individuals (27%) indicated that they had "no idea".

Some of the general comments received about the program were: "I found it most rewarding", "A very useful, worthwhile service", "It can help a lot of people" and "Very useful for coordinating contracts".

## VIII. COMPARISON WITH OTHER SHARED HOUSING PROGRAMS

### A. Comparison

Relying upon surveys prepared by the Gray Panthers of Washington D.C. and the Department of Aging and discussion with other program operators in California, this Section of the evaluation attempts to access the performance of the SAIL program in relation to other shared housing programs in operation throughout the country.

The chart on the following page compares the operation of the SAIL program with other shared housing programs in a number of different areas, i.e., number of matches, minority composition, cost of matches, staff requirements, etc. Further documentation of this comparison is also provided in Appendix D of this evaluation.



B. Comparison Conclusion

1. Matches/Applicants: The number of applications received in the SAIL program doubles (654/285 or 229%) the median figure received for other programs in their first year of operation. However, as shown by Table I, Appendix B, the SAIL program was less efficient than other programs in the percentage of applicants matched (13% of the applicants matches vs. a 17% median for the comparison groups).
  
2. Dollars Spent Per Match: The range for matching costs for the comparison group ran from a \$104 figure to \$936 per match. The median cost was \$683 per match. The SAIL program cost of \$528/match appears in line with the other program surveyed. It should be noted that the \$104 figure is represented by the San Jose Project Match Program's costs. This program's success can be attributed to the demographic conditions of the San Jose Area (see appendix C) and the large staffing budget. During the year when program costs ran \$104 per match, the program employed 6 full time staff, 1 part-time person and 15 volunteers. Outside of this \$104 figure, the SAIL program at \$528 was the second lowest figure of those surveyed.
  
3. Staff Positions: Most of the matching services employed 1 1/2 staff people (1 full-time position and 1/2 time position or 3 part-time positions) and a few volunteers. This exception was San Jose's Project Match Program. (See above). However, a conversation with the San Jose Program Manager, indicated that San Jose has reduced its employee positions to 2 1/2 counselors. (This was caused by cutbacks in CETA positions).

The number of SAIL staff positions (2 full-time equivalent positions - 1 full-time and 2 part-time positions) appears in line with the other program surveyed.

COMPARISON WITH OTHER PROGRAMS IN  
FIRST YEAR OF OPERATION

<u>CATEGORY</u>	<u>COMPARATIVE GROUP</u>	<u>SAIL</u>
APPLICANTS		
TOTAL NUMBER	Range: 118-423 <sup>1/</sup> Median: 285	554
MALE/FEMALE	Approx. 15-30% Male Applicants	32% Male
CAUCASIAN	Range: 30-90% Median: 78%	93%
MINORITIES	Range: 10-70% Median: 23%	7%
HOUSEHOLDERS	Range: 27-61% Median: 44.5%	60%
HOMESEEKERS	Range: 39-73% Median: 55.5%	40%
UNDER 60	Range: 16-76% Median: 40%	40%
OVER 60	Range: 24-84% Median: 60%	60%
MATCHES		
TOTAL NUMBER	Range: 31-196 Median: 42	87 <sup>2/</sup>
TYPES OF MATCHES		
1-1	Range: 0-100% Median: 80%	85%
3 or More	Range: 0-100% Median: 20%	15%
STAFF		
FULL TIME	Range: 0-3	1
PART TIME	Range: 0-3	2
VOLUNTEERS	Range: 0-4	
BUDGET	Range: \$28,000-\$124,000 Median: \$34,624	\$45,953

<sup>1/</sup> Maximum figure reflects number of applications received in Project Match (San Jose) in its first year's operation. In the most recently completed year, this figure increased to 3200 applications with 1200 matches.

<sup>2/</sup> Another independent survey performed by the Department of Aging in May 1983 indicated that the median match figure for shared housing programs in California is 60 with a range of matches between 6 and 1188 per year.

- 4. Client Profile: With the exception of the minority representation, it appears the householder mix, sex and age breakdown are representative of other programs in operation.

IV. SUMMARY OF FINDINGS AND RECOMMENDATIONS

The following list summarizes those findings and recommendations which staff believe are worthy of further consideration. Those of special note are identified as major findings:

- 1. The program is well organized and appears to be operating effectively. The program is staffed by concerned, efficient program operators. The matching goals have been achieved and exceeded. In consideration of the fact that a half-time (20 hour week) individual handles all matches, an average of 7 matches a month seems reasonable. However, in consideration of the fact that: 1) another part-time coordinator will be utilized in the next fiscal year, and 2) a full year's expenses in program operation should allow staff to more efficiently administer the program, the number of target matches for the next year should be increased from 70 to 140.
- 2. As figures were not available from other program operators for the average amount of time to make a match, it was not possible to compare SAIL's statistics with other programs. However, the three week time period for placement of homeseekers appears reasonable. The longer nine week average for householders stems from the program's disproportionate share of householder applicants over homeseekers (three out of every four applicants are householders).
- 3. Clear expectations of the role and responsibilities of both homesharers is crucial for a successful match. Staff should continue to emphasize the importance of developing a clear understanding of all aspects of the homesharing arrangement prior to the match. Emphasis should be placed on the long-term compatibility of the homesharers.
- 4. The 4.84 month average length of time for existing matches seems of short duration. This is also reflected in the average length of stay of 4.1 months prior to termination of the match. The former figure, however, cannot be properly evaluated until the program is in operation for a longer period of time.

It is important to bear in mind when analyzing these statistics that certain reasons for terminations do not reflect upon the success of the program. For instance, the medical and school related causes of termination, representing 34% of the total number, are examples of uncontrollable circumstances which arose in the match which necessitated termination. In addition, the program operator estimates that \$171,800 has been saved by the public sector as a result of preventing premature institutionalization. (See Appendix E).

However, the remaining 66% of the matches which terminated for personality related reasons require examination. It is suggested that the reasons for termination be evaluated more critically to determine whether actions should have been undertaken by program staff to prevent terminations, i.e., the establishment of clearer expectations up front or through providing earlier counseling assistance to prevent early deterioration of the match. It is suggested that a termination form be completed to access the specific reason why the match was terminated and to indicate if some action could have been taken by staff to prevent termination. This form would also be used to justify the rematching of individuals previously matched under the program.

5. Efforts should be undertaken to extend outreach to the minority population of the community. A disproportionate share of the client group (93%) are Caucasian.
6. Volunteers should be utilized more extensively throughout the program. This will allow the program to increase the number of individuals matched.
7. Potential homesharers should be fully apprised of all physical limitations which would involve care, support and assistance on the part of one of the parties. This knowledge would allow the individuals to better evaluate their interest and willingness to enter into the match.
8. The program operators should continue to utilize successful matches to assist in presentations in their outreach efforts. The "first hand" experience shared by individuals have proved beneficial in both advertising the program and enabling potential clients to fully understand both the advantages and disadvantages of the shared housing arrangement. Realistic expectations prove invaluable in successful matches.

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9. The pre- and post-match counseling services should be thoroughly explained to the participants. A number of the individuals who completed the survey appeared unaware of this service.
  10. Steps should be initiated to train and develop capabilities within non-profit community groups to operate a financially self-sufficient shared housing program.
  11. The advisory council should increase its involvement in assisting staff in publicity, community liaison and fund-raising efforts.
  12. A \$25 stipend should be placed on participants of the program. This fee structure would have commanded approximately \$4,350 (\$25 x 2 persons x 87 matches) towards program operations.
  13. A fundraising effort should be undertaken to obtain private funding for the program. A survey performed by the Department on Aging in May 1983 indicated that of the 37 shared housing operations in California which responded to the survey, 35% of the programs utilized private funds to either exclusively fund or partially subsidize their programs. One operation in Los Angeles relies on the private sector to supply 70% (about \$70,000) of its budget. The program director attributes their success to: 1) numerous speaking engagements; 2) development of grant proposals; 3) an annual dinner (\$150/per person); and 4) representation of a number of affluent, civic-minded citizens on their advisory council.
  14. Any additional staff positions should be financed through Federal or State grants, private donations, fundraising drives and fee matching charges.

#### X. CONCLUSION

Staff recommends the continued funding of the SAIL Program by the Community Development Block Grant Program at its current level. This recommendation is based on two reasons. First, on the whole, the SAIL program appears to be operating efficiently and effectively. In addition, upon implementation of the recommendations outlined in this evaluation, the program should further improve its ability to meet its goals and objectives. Second, and perhaps even more important, the program offers a valuable resource. The loss of this program would not only inhibit the Agency from meeting its housing assistance goals and objectives but also deny the low income sector of the Community of a much needed housing resource.



452 I Street  
Sacramento, Ca. 95814  
(916) 440-1344

HOUSEHOLDER'S APPLICATION

SENIORS ALLIED IN LIVING, INC.

DATE: \_\_\_\_\_

NAME: \_\_\_\_\_ AGE: \_\_\_\_\_ SEX: M F MARITAL STATUS: \_\_\_\_\_ M S

ADDRESS: \_\_\_\_\_ MAIN CROSS STS. \_\_\_\_\_ PHONE: \_\_\_\_\_

INCOME/MO.: \_\_\_\_\_ SS SSI PENSION DISAB. \_\_\_\_\_ WHERE LEARNED OF SAIL: \_\_\_\_\_

HEALTH: G F P DISABILITY: \_\_\_\_\_ CONTACT: \_\_\_\_\_ PHONE: \_\_\_\_\_

<u>USE OF</u>	RENTING ROOM ONLY	\$ _____	<u>PREFERENCES:</u>
HOME _____	ROOM AND BOARD	\$ _____	OK _____ NO _____
KITCHEN _____	R/B FOR-SERVICES	_____	
PRIVATE BEDROOM _____	SHARE COSTS & WORK	_____	
FURNISHED " _____	# HOURS WORK/WEEK	_____	
BATH: PRIVATE _____	WILL PAY	_____	MAN _____
SHARED _____	HOUSE _____	_____	WOMAN _____
MEALS: SHARED _____	APARTMENT _____	_____	COUPLE _____
PROVIDED _____	MOBILE HOME _____	_____	FAMILY _____
SEPARATE _____	RENTED _____	_____	STUDENT _____
HOUSEHOLDER'S CAR _____	OWNED _____	_____	GROUP _____
TRANSPORT BY HH _____	# BEDROOMS _____	_____	ALCOHOL _____
STORAGE _____	# BATHS _____	_____	SMOKING _____
			PETS _____

	<u>SERVICES DESIRED BY HOUSEHOLDER</u>		<u>HH HAS:</u>
COOKING _____	HOUSEWORK _____	TRANSPORTATION _____	FURNITURE _____
CHILD CARE _____	YARDWORK _____		PETS _____
PERSONAL CARE _____	MARKETING _____		CHILDREN # _____
TYPE OF CARE _____			AGES _____
			CAR _____

<u>OTHER INFORMATION</u>	<u>WILL ACCEPT:</u>	<u>ETHNICITY:</u>
CURRENT RENT \$ _____	FRAIL ELDERLY _____	HISPANIC _____
DIST. BUS & LINE # _____	PREG. TEEN _____	WHITE _____
GROCERY _____	CHILDREN _____	BLACK _____
SHOP. CTR. _____	DISABLED _____	ASIAN/PACIFIC ISLANDER _____
STEPS _____		AMER. IND./ALASKAN _____

REFERENCES: \_\_\_\_\_

<u>NAME</u>	<u>ADDRESS</u>	<u>PHONE</u>
_____	_____	_____

I WISH TO PARTICIPATE IN THE SHARED HOUSING PROGRAM. INFORMATION MAY BE RELEASED IN THE INTERESTS OF MATCHING WITH A HOMESEAKER.

CONVICTED OF FELONY: YES NO SIGNED: \_\_\_\_\_ DATE: \_\_\_\_\_

MATCH ATTEMPTS:

_____	_____	_____
_____	_____	_____
_____	_____	_____

SHARE EXP L-1	NEED AID H-4
COMPANION L-2	GIVE AID K-4
	RENTAL H-3

N S E W DT (22) OOT



# SACRAMENTO HOUSING AND REDEVELOPMENT AGENCY



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COMMUNITY SERVICES DIVISION  
S.A.I.L. - Seniors Allied In Living

## HOMESHARING APPLICATION

DATE: \_\_\_\_\_ LOG NO: \_\_\_\_\_

NAME: \_\_\_\_\_ SEX: M F MARITAL STATUS: Si M D W Sp

BIRTH DATE: \_\_\_\_\_ PLACE OF BIRTH: \_\_\_\_\_ SSN: \_\_\_\_\_

DRIVER'S LICENSE NO: \_\_\_\_\_ STATE: \_\_\_\_\_ HEALTH: G F P

ADDRESS: \_\_\_\_\_ CITY: \_\_\_\_\_ ZIP: \_\_\_\_\_

HOW LONG: \_\_\_\_\_ PHONE: \_\_\_\_\_ CONTACT: \_\_\_\_\_

REFERRAL SOURCE: \_\_\_\_\_ ETHNICITY: (Stat only) A/PI Bl Ca Hs NA

MOST RECENT EMPLOYER: \_\_\_\_\_

POSITION: \_\_\_\_\_ HOW LONG: \_\_\_\_\_ WHEN: \_\_\_\_\_

EVER CONVICTED OF FELONY: \_\_\_ EXPLAIN: \_\_\_\_\_

LIST TWO LOCAL REFERENCES:

NAME	ADDRESS	PHONE	RELATIONSHIP
NAME	ADDRESS	PHONE	RELATIONSHIP

(Current or previous landlord, employer, clergy or similar NOT related)

I WISH TO PARTICIPATE IN THE SAIL HOMESHARING PROGRAM; MY FIRST NAME AND PHONE MAY BE GIVEN OUT FOR MATCH INFORMATION. I AUTHORIZE SAIL TO CONTACT LAW ENFORCEMENT AGENCIES TO CERTIFY INFORMATION RELATING TO CRIMINAL RECORDS. (Conviction of a crime is not necessarily a bar to acceptance as a homesharer.)

I hereby certify that all statements in this application are true and complete to the best of my knowledge. I agree that any misstatements or omissions of material facts herein may cause forfeiture on my part of all rights to participation in the SAIL homesharing program.

\_\_\_\_\_  
SIGNATURE OF APPLICANT

\_\_\_\_\_  
DATE

CVRAPP.FM 4/84  
CONFIDENTIAL: INTERNAL USE ONLY

MAILING ADDRESS: P.O. BOX 1854, Sacramento, CA 95809  
OFFICE LOCATION: 630 I Street, Sacramento, CA 95814 (916) 444-9210

SAIL MONTHLY DATA REPORT

	J	A	S	1st QTR.	O	N	D	2nd QTR.	HALF YEAR	J	F	M	3rd QTR.	A	M	J	4th QTR.	2d HALF YEAR	YEAR 82-83
<b>HOUSEHOLDERS ON FILE</b>	80	87	92	80	153	180	194	153	80	177	193	211	177	201	204	226	201	177	80
<b>NEW</b>	27	17	72	116	27	29	31	87	203	38	30	26	94	20	36	39	95	189	392
<b>INACTIVE</b>	20	12	11	43	0	15	48	63	106	22	12	36	70	17	14	74	105	175	281
<b>ACTIVE</b>	87	92	153	153	180	194	177	177	177	193	211	201	201	204	226	191	191	191	191
<b>HOMESEEKERS ON FILE</b>	10	18	29	10	48	53	49	48	10	22	46	58	22	69	82	88	69	22	10
<b>NEW</b>	14	20	30	64	13	32	22	67	131	31	16	23	70	17	17	27	61	131	262
<b>INACTIVE</b>	6	9	11	26	8	36	49	93	119	7	4	12	23	4	11	80	95	118	237
<b>ACTIVE</b>	18	29	48	48	53	49	22	22	22	46	58	69	69	82	88	35	35	35	35
<b>REFERRALS</b>	38	33	52	123	23	18	31	72	195	6	38	27	71	23	24	10	57	128	323
<b>COUNSELING</b>	62	55	84	201	30	33	25	88	289	37	12	46	95	39	38	2	79	174	463
Target for both = 200/yr.	100	88	136	324	53	51	56	160	484	43	50	73	166	62	62	12	136	302	786
Percent of Target Met-				162%					242%				83%				68%	151%	393%
<b>AGES</b>																			
<b>Under 60</b>	13	22	38	73	17	31	23	71	144	36	20	24	80	13	19	25	57	137	281
<b>60-64</b>	8	6	11	25	6	6	6	18	43	3	3	2	8	2	4	6	12	20	63
<b>65-74</b>	14	20	18	52	9	14	9	32	84	12	7	6	25	10	3	10	23	48	132
<b>Over 74</b>	5	16	43	64	8	11	15	34	98	18	10	18	46	12	9	15	36	82	180
<b>FROM INSTITUTIONS</b>	0	1	1	2	1	0	0	1	3	1	0	0	1	0	1	0	1	2	5
<b>INSTITUTION PREVENTED</b>	2	0	0	2	1	1	2	4	6	2	0	0	2	0	1	0	1	3	9
<b>GROUP HOMES ESTABLISHED</b>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>NUMBER OF MATCHES</b>	4	4	7	15	7	10	6	23	38	13	8	8	29	10	4	6	20	49	87
<b>NUMBER OF CLIENTS MATCHED</b>	8	8	15	31	16	20	12	48	79	26	21	20	67	23	12	8	43	110	189

APPENDIX B

(2)



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SAIL SHARED HOUSING QUESTIONNAIRE

1. General information on individual completing questionnaire:

a. Were you the homeowner?

1) Yes \_\_\_\_\_ 2) No \_\_\_\_\_

b. Is the match still in existence?

1) Yes \_\_\_\_\_ 2) No \_\_\_\_\_

If the answer is "NO", why did the match terminate?

\_\_\_\_\_ Medical reasons

\_\_\_\_\_ School related

\_\_\_\_\_ Other \_\_\_\_\_

c. How long did the match last? \_\_\_\_\_

d. Were you matched more than once?

1) Yes \_\_\_\_\_ 2) No \_\_\_\_\_

2. How would you describe your experience with this program in the following areas?

	Good	Fair	Poor
a. Timely response (length of time to make match)	_____	_____	_____
b. Courteousness of Program Staff	_____	_____	_____
c. Pre-Match Counseling	_____	_____	_____
d. Post-Match Counseling	_____	_____	_____
e. Overall Matching Service	_____	_____	_____

3. What could the program operators have done to make the match more successful?

4. How much money do you think this service was worth to you? \$ \_\_\_\_\_

5. Would you recommend this program to others?

a. Yes \_\_\_\_\_ b. No \_\_\_\_\_

Why?

6. Overall comments/recommendations:

Appendix D - Performance Tables - TABLE I

PROGRAM	MATCHES/APPLICANT	%	DOLLARS SPENT/MATCH	%
Back Bay Aging Concerns Comm.	32/118	27%	NI	NI
Project Match	196/423	46%	\$124,000/1189 <sup>1/</sup>	\$104/match
Homesharing for Families	39/182	21%	\$34,624/39	\$888/match
Homesharing for Seniors	44/320	13%	\$42,281/44	\$936/match
Operation Match <sup>2/</sup>	31/250	12%	\$28,000/41	\$683/match
Elder Shelter Program	52/413	13%	\$30,000/52	\$577/match
	Median	17%	Median	\$683/match
SAIL	87/654	13%	\$45,953/87	\$528/match

1/ Data from their most recent year of operation. (Staff consists of 6 full-time individuals and 15 volunteers).

2/ For first nine months of operation

NI= Not Indicated

TABLE II

Program	Total	APPLICANTS		Caucasians	Minorities	Householders	Homeseekers	Under 60	Over 60	Total	MATCHES	
		Male	Female								1-2	3 or more
Back Bay Aging Concerns Committee Boston, MA	118	NI	NI	NI	NI	32	86	NI	NI	32	80%	20%
Project Match San Jose, CA	423	NI	NI	NI	NI	NI	NI	NI	NI	196	94%	6%
Homesharing for Families. Seattle, WA	182	71	111	128	54	NI	NI	NI	NI	39	All matches between parents with children	
Homesharing for Seniors Seattle, WA	320	88	180	281	48	140	180	128	192	44	73%	27%
Operation March Washington, D.C.	250	70	177	74	172	112	136	182	56	31	70%	30%
The Elder Shelter Program Tucson, Az	413	92	303	372	41	250	163	66	347	52	100%	0%
SAIL	654	209	445	608	46	392	262	262	392	87	85%	15%

NI = Not Indicated

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TABLE III

	Full-time	Staff Part-time	Volunteers	Budget
Back Bay Aging Concerns Committee	1, -	1, -	1, -	No specific budget line, belongs to larger umbrella organization
Project Match	3, 6	0, 1	0, 25	NI, \$124,000
Homesharing for Families	-, 1,	-, 1	-, 0	-, \$34,624
Homesharing for Seniors	1, -	1, -	4, -	\$42,281 -
Operation Match	0	3	0	No specific budget line - estimated costs \$28,000
The Elder Shelter Program	0, -	3, -	4, -	\$30,000 -
SAIL	1	2	0	\$45,953

Note: First row reflects program's first year of operation.  
 Second row reflects the program's most recent year of operation.

Table IV - Demographic Comparison of Sacramento to Comparative Groups

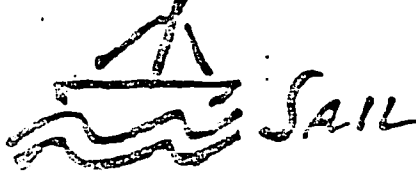
Location	Total Population	% Black**	%Hispanic**	% under 18	% 18-64	% 65+	Householders 65-75	75+	Persons 75+ Living Alone
District of Columbia	638,333	70.3	2.8	22.5	65.9	11.6	30,105	17,393	9,629
Boston	562,994	22.4	6.4	21.6	65.7	12.7	25,692	18,913	10,940
San Jose, CA	629,442	4.6	22.3	31.0	62.8	6.2	14,308	8,509	4,551
Seattle, WA	493,846	9.5	2.6	17.6	67.0	15.4	29,471	21,651	13,579
Sacramento CA	275,741	13.4	14.2	24.6	61.8	13.6	14,915	9,758	5,814

Location	Owner-Occupied Housing Units	Renter-Occupied Housing Units
District of Columbia	89,846	163,297
Boston	59,504	158,953
San Jose, CA	106,669	56,864
Seattle, WA	111,951	107,518
Sacramento, CA	63,661	49,198

\* Statistics derived from the 1980 U.S. Census

\*\* % of the Total Population

pt



July, 1983

SENIORS ALLIED IN LIVING, INC.

SAIL ACTIVITIES: FIRST ANNUAL REPORT

ESTIMATE OF SAVINGS AS A RESULT OF PREVENTING INSTITUTIONALIZATION

Based on:

a. Conservative estimates of hospital and other facility costs.

Actual costs: ICF/SNF private pay: \$1500-2200

" " state pay: 1100-1500

Adjusted for client income:

private: \$1500

state: \$800

b. Hospital admission data for elderly

c. SAIL documentation

23 clients were kept in the home for an average of 4 months each.

BREAKDOWN OF SAVINGS OVER AND ABOVE QUALITY OF LIFE:

\$ SAVED/Mo

10 clients from nursing homes	3 private pay @ \$1500	4500
	7 state pay @ 800	5600
13 kept in home by homesharer	6 private pay @ 1500	9000
	7 state pay @ 800	5600
		\$ 24,700/Mo.
	<u>TOTAL NURSING HOME SAVINGS</u>	\$ 98,800/4 mo

Estimated acute level hospitalization prevented:

Of the 13 kept in the home,

3 would probably not have needed acute level hospitalization: 0000

10 Probably would have needed acute level;

7 of these would probably have needed ICF,

5 days @ \$1250 \$43,750

followed by semi-private room,  
5 days @ 450 15,750

\$ 59,500

3 others would have needed semi-private room; 13,500

10 days @ 450 Total Acute 73,000

" Nsg:H. 98,800

TOTAL ESTIMATED SAVINGS, 23 MATCHES ALONE: \$ 171,800

PING YUEN CENTER, 452 I STREET, SACRAMENTO, CALIFORNIA 95814