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SHARED LIVING RESIDENCE and ABBEYFIELD HOME

Description:

A Shared Living Residence is a housing option in which a small group (typically, three to ten—sometimes, a few more) of unrelated people share the housing unit and the expenses and tasks of running the household. Residents may be all elderly adults or an intergenerational mix of older and younger adults. Each resident has a private bedroom and a shared or private bath; all residents share the kitchen, dining room, and living room/areas.

Shared Living Residences are attractive to residents who are capable of independent living, but whose circumstances make them unable or unwilling to continue living alone—for example, can no longer manage tasks such as snow shoveling, lawn mowing, or cooking; are no longer driving; are lonely or isolated because social networks have dwindled or families live far away; can no longer afford their housing costs; are afraid to stay alone at night; are experiencing aging-related frailties such as vision and hearing loss, arthritis, or loss of agility, which can compromise feelings of competency for safely living alone; etc.

A Shared Living Residence is owned/sponsored by a community organization, and residents pay a monthly charge that includes rent, housing expenses, and food. Often, the sponsoring organization provides a staff person (live-in or daily on-site) who acts as a "housemother," to facilitate any disagreements that can arise from living together, to help residents operate the household and manage household decision-making, to help residents coordinate social activities, and to assist elderly residents with relocation tasks and counseling when a higher level of care and assistance is needed.

In a Shared Living Residence, residents live together "as a family," sharing meals, companionship, socialization activities, and benefiting from the familial environment of mutual emotional and supportive assistance. This option differs from:

(1) A Match-Up Home Sharing Program, which typically involves two participants, one of whom owns the home (see *Match-Up Home Sharing Program* in the *Resource Manual*);

(2) An arrangement in which a group of unrelated individuals of any age live together, but not as a family unit; there is a traditional rental lease; each individual pays a portion of the rent (which may or may not include utilities); the landlord is responsible for housing-related expenses; and the arrangement does not presume the sharing of meals, activities, and mutual support;

(3) Small-sized facilities for a small number elderly people—which are licensed and overseen by a variety of government agencies; which are, from their initial

development, specifically designed as a licensed, professionally staffed facility for residents who are provided with personal care and health aide services; and which are known by a variety of names across the country (such as alternative family care, assisted living, personal care homes, adult residential facilities, enriched housing, and others);

(4) Group homes for a small or large number of adult or adolescent special-needs populations, which include specially trained professional staff and specialized programming and training, are available in most states, and which are licensed by various government agencies, such as the Department of Health, Department of Social Services, Office of Mental Health, Office of Mental Retardation and Developmental Disabilities, Office of Children and Family Services, Office of Alcoholism and Substance Abuse, Department of Community Affairs, and others; or

(5) Green Houses,[®] which are small, home-like Skilled Nursing Facilities (nursing homes) for a small number (typically six to 12) of residents and which are licensed by a government agency (in New York—the State Department of Health) (see *Small House Nursing Homes—some are trademarked as Green Houses.*[®] in the *Resource Manual*).

Typically, across the country, Shared Living Residences do not require licensure and oversight by a government agency because *no* personal care or health aide services are provided or arranged for by the sponsor/owner organization. On an individual basis, a resident and/or his physician or family member can arrange privately for personal care or home health services from a community-based home health care agency. In New York, a Shared Living Residence would require licensure by the State Health Department as an Enriched Housing Program or Adult Home *if* the sponsor/owner chose to provide/arrange for personal care assistance with Activities of Daily Living (bathing, dressing, grooming, eating, toileting, transferring in and out of a wheelchair) to be provided to frail residents.

Across the country, according to Patricia Pollak and Alice Gorman, the definition of "family" in a locality's zoning ordinance is the restriction most likely to prevent the use of a Shared Living Residence as a housing option. Over time, "both federally and state-by-state statute and case law are continually evolving to clarify what communities can and cannot do with regard to defining 'family' for the purpose of zoning," as well as clarifying language to define what constitutes a "single housekeeping unit," "necessary biological or legal relationships among residents of a sharing arrangement," and "the validity of ordinances that specify the maximum number of unrelated people who can live together in a single-family residence."¹

Abbeyfield Homes:

An Abbeyfield Home is a housing concept very similar to Shared Living Residences. Abbeyfield, a nonprofit organization, originated in England and currently has over 500 houses and 80 care homes across the United Kingdom, all of which are self-supporting, affordable homes that provide a familial living environment for a small number (10 – 15) of older adults and/or younger-aged individuals who are unable to live independently alone. A proportion of Abbeyfield Homes, like Shared Living

Residences in the United States, include an on-site house manager; provide companionship, a supported independent lifestyle, and the benefits of living together as a "family" (shared expenses, activities, and tasks); maintain close ties with the surrounding community; and utilize both volunteer and paid staff. However, unlike Shared Living Residences, a proportion of Abbeyfield Homes also include teams of volunteers and professional care staff who provide personal care, home health aide services, higher levels of care, and 24-hour supervision for frailer residents.

The Abbeyfield Society provides information and technical assistance for the development of Abbeyfield Homes throughout the world, with about 900 homes currently in existence in 16 countries. For example, there are 30 Abbeyfield Homes in Canada; the Abbeyfield Initiative of Western Massachusetts is an effort to start self-organizing group homes, based on the Abbeyfield Homes model, for older adults and younger "at risk" populations; and Abbeyfield US, which is based in East Central Illinois, is working with Abbeyfield St. Joseph in Illinois and the Massachusetts Initiative to develop the first Abbeyfield Homes in the United States. Across the world, each Abbeyfield Home is connected to a worldwide support network called Abbeyfield International, based in St. Albans, England. In England, Prince Charles serves as a patron to the Abbeyfield network.

Reference:

¹ Patricia B. Pollak and Alice N. Gorman (1989), "Shared Living Residences," *Community-Based Housing for the Elderly: A Zoning Guide for Planners and Municipal Officials*. Washington, DC: American Planning Association.

Benefits:

For older adults:

- Shared Living Residences provide an increased opportunity for older people to successfully age in place:
 - *Environment:* The physical structure is a single-family home, the living environment is non-institutional and familial, and the number of residents is always limited—providing a housing option that is very similar to an older person's previous life style.
 - *Affordability:* Home-sharing allows several individuals to share food and housing-related expenses.
 - *Companionship:* Older adults who live alone are more vulnerable to loneliness, social isolation, and depression. Home-sharing sustains interactions with other people and promotes involvement in socialization activities, which have a positive impact on physical and mental health.
 - *Sense of safety and security:* Having other people in the home, particularly at night, allows an older person to feel less vulnerable to crime, as well as more emotionally secure in knowing others are available in the event of a health or other emergency.
 - *Continued independence:* Shared arrangements typically include the sharing of household tasks and activities, allowing each participant to compensate for the functional limitations of the others. Even if a "housemother" is on site to

perform different tasks, residents actively engage in household duties and activities to the extent they are able.

For younger-aged people with disabilities:

- Shared Living Residences can include only older people or can be an intergenerational mix of older people and younger-aged individuals with various types of disabilities.
 - The same benefits that accrue to older adults living in a Shared Living Residence also accrue to younger-aged residents who have various types of disabilities that preclude their living alone successfully.

For caregivers:

- A major preference of both older people and younger-aged people with disabilities is to remain living in their own homes. The greater majority of care and services for both these population groups is provided informally (unpaid) by family members and friends, and these caregivers have a strong desire to accommodate the living environment preference of the people they care for. A Shared Living Residence provides: (1) a home-like, familial environment that closely matches a older person's previous housing environment; (2) matches the previous living environment for people with disabilities who have lived with and been cared for by parents who have now aged or have died; and (3) provides a non-institutional, familial environment for individuals with disabilities who are transitioning from institutions but who are unaccustomed to living alone. Thus, this housing option addresses the living environment preferences of all these population groups while supporting the substantial efforts of their informal caregiving family members and friends:
 - The presence (and, often, supportive assistance) of other people in the Shared Living Residence reduces the number of tasks and the number of caregiving hours that are being provided by the caregiver.
 - The presence of other people (and, often, a "housemother") in the Shared Living Residence provides caregivers with a comfort level, reducing their continual worry about the safety of their family member, their concern about emergency situations going unnoticed, and their anxiety about the impact of a family member's social isolation when living alone.
 - In addition to emotional and instrumental responsibilities, caregivers assume financial responsibilities for older or disabled family members. The sharing of housing-related expenses in a Shared Living Residence can reduce a caregiver's financial burden.

For younger-aged participants who do not have a disability:

- Shared Living Residences can include an intergenerational mix of younger and older people:
 - For low-income younger individuals, the sharing of housing-related expenses provides an affordable rental option.
 - A Shared Living Residence offers a younger-aged individual the potential of free rent or reduced rent in exchange for providing various types of assistance (driving, home upkeep, household tasks, etc.).

For the community:

- *Housing stock is maintained:* The greater proportion of older people are homeowners, and most continue living in their homes until very old age or death. There is an association between advancing age and physical and mental decline, which can result in an inability of elderly adults to adequately maintain their existing homes, leading to the subsequent deterioration of the physical structure. Relocation to a Shared Living Residence can prevent deterioration of these structures—thus, helping to stabilize a community's housing stock.
- *Affordable housing:* A Shared Living Residence is an excellent housing alternative that can help ease the continual gap in many communities between the demand for affordable housing and the available supply of traditional affordable housing models.
- *Stabilized population:*
 - The affordability aspects and the home-assistance/social-integration benefits of a Shared Living Residence for both younger and older individuals help keep both these populations remaining in the community—with positive impacts on labor pools, institutional health-care costs, economic vitality, and "sense of community."
 - The presence of multiple residents in a Shared Living Residence greatly reduces the opportunity for crime and victimization that can occur to individuals who are living alone, providing a community with a safe housing alternative.
- *Volunteer opportunities:* Abbeyfield Homes and Shared Living Residences maintain close ties with the surrounding community, utilizing both paid and volunteer staff in operating the household and in arranging/providing social and educational activities. In keeping with the principles of a *livable community*, these models provide meaningful volunteer opportunities for residents of all ages from the wider community.

Impediments or barriers to development or implementation:

- *Legal constraints:*
 - Zoning:
 - In some states, a municipality's definition of "family" or its language specifying a maximum number of unrelated individuals who may live together can prevent the establishment of a Shared Living Residence or may not allow a sufficient number of residents needed to make the Residence both affordable for residents and financially feasible to operate.
 - Some municipalities may designate "single-family dwellings" in a way that precludes unrelated individuals living together.
 - Landlord/tenant issues:
 - Shared Living Residences may use a residential agreement to spell out the rights and responsibilities of residents; however, some municipalities might not accept shared housing agreements as valid landlord/tenant contracts; thus, sharers will have no *formal* recourse for handling unresolved disputes.

- *Preferences:* In the United States, there is a long, strong tradition of preferring one's own living quarters: (1) for the maximum privacy that comes from living alone or with members of one's nuclear family, (2) from a reluctance to living with unrelated individuals, and (3) from a stigma often felt from not having one's own home or apartment. Thus, despite the many benefits of home-sharing, as well as the expressed satisfaction experienced by sharers, this is typically not a high initial housing option preference. Education, repeated discussions, media exposure, and a community's ongoing successful experience with a Shared Living Residence can convince individuals to give serious consideration to engaging in a home-sharing alternative.
- *Slow start-up:* A program requires a sufficiently large pool of potential residents to which to market a Shared Living Residence. Because of strong preferences for traditional housing options and a general lack of awareness of the benefits of Shared Living Residences, a new program may require an extended start-up time while a sufficient number of applicants apply for residency.
- *Rural/urban:* New programs may have an easier start-up in urban areas than in rural or suburban areas because of the larger population base in urbanized areas, the greater lack of affordable housing units in urban areas, and the greater number of low-income individuals in urban areas who will consider home sharing because other affordable options are unavailable.
- *Stable funding:* New programs may succeed in locating initial funding to develop a Shared Living Residence. However, since the number of residents is small, financial sustainability over time requires continued marketing and maintaining a viable waiting list in order to avoid extended vacancies, which can either drive up rental costs or create operating deficits.

Resource—examples:

- Harvest Houses, a non-sectarian, non-profit organization directed by the Sisters of Saint Dominic and run by the Emmaus House Foundation, Inc., Syosset, NY. The Foundation operates three very successful Shared Living Residences on Long Island, NY, for well-elderly people:
 - Harvest House, Syosset, New York
 - Harvest Grove, Lake Grove, New York
 - Harvest Park, Floral Park, New YorkContact: S. Jeanne Brendel, Executive Director, Harvest Houses, 235 Cold Spring Road, Syosset, NY, 11791; (516) 496-9796; jabharvest@att.net; <http://www.harvesthouses.org/>.
- Fairport/Perinton Senior Living Council (SLC), a coalition located in Fairport, NY, made up of Perinton Churches Housing (1030 Whitney Road East, Fairport, NY, 14450, (585) 377-4390) and Senior Living Council (31 South Main Street, Fairport, NY, 14450, (585) 421-3240). The coalition provides several apartment housing developments, Roselawn Shared Living Residence, and numerous services for older people: <http://www.seniorlivinginperinton.org/index.htm>.

- Roselawn Shared Residence, 41 Roselawn Avenue, Fairport, NY, a Shared Living Residence for individuals aged 60 and over who are able to live independently, operated by Senior Options for Independence (SOFI), a joint program of SLC. Contact: SOFI, 4646 Nine Mile Point Road, Fairport, NY, 14450; (585) 377-7830;
<http://www.seniorlivinginperinton.org/housing.htm#Roselawn>.
- Senior Home Sharing, Inc., a nonprofit organization in DuPage County, IL, dedicated to helping meet the need for affordable senior housing. Located at 711 East Roosevelt Road, Wheaton, IL, 60187. Contact: (630) 407-0440, Ext. 251; icooney@seniorhomesharing.org;
http://www.seniorhomesharing.org/about_us.htm;
<http://www.seniorhomesharing.org/history.htm>.
 - The organization operates four Shared Living Residences for older people: Park Place in Downers Grove; Chase Place in Lombard; Van Buren Place in Elmhurst; and Eagle Place in Naperville.
 - Photos: http://www.seniorhomesharing.org/our_homes.htm.
 - Video: <http://www.seniorhomesharing.org/>.
- *The Park House: a Shared Elder Residence*, a Shared Living Residence for people aged 60 and over and some qualifying individuals under age 60. Their Web site provides extensive descriptive information, application forms and rates, admission criteria, a virtual tour, newsletter, news article, and more. Located on Main Street, Rochester, Vermont, 05767. Contact: (802) 767-3416.
<http://parkhousevt.org/index.php>.

Resource—written and web:

- *National Shared Housing Resource Center* (NSHRC), a nonprofit membership organization that provides publications and conferences and serves as a clearinghouse for information on Shared Living Residences and Match-Up Home Sharing Programs. NSHRC provides a national state-by-state directory for those who wish to identify/locate a shared housing organization in their community or who wish to start a program. While NSHRC *does not* register/match individual home providers and home seekers or help them create a shared living arrangement, the state-by-state directory helps individuals identify organizations in their area that *will* assist them in making home-sharing arrangements or apply for a Shared Living Residence. NSHRC is located at 364 South Railroad Avenue, San Mateo, CA, 94401. Contact: Jacqueline Grossmann, Co-President: jackie@interfaithhousingcenter.org; Eva Gertzfeld: Co-President: eva@centerofconcern.org; <http://nationalsharedhousing.org/>.
 - Contact information for NSHRC Regional Coordinators:
<http://nationalsharedhousing.org/about-us/> .
 - Region 2: NY, DE, PA, NJ: Angele Leaptrot, Women's Rights Information Center; (201) 568-1166; sharedhousingprogram@yahoo.com.
 - Order form (<http://nationalsharedhousing.org/resource-center/publication-ordering/>) for:

- *A Planning Guide for Shared Living Residences*, a practical guide for developing, financing and managing a Shared Living Residence;
- *Shared Housing Directory*, A national directory with information on more than 300 programs;
- *Shared Housing Newsletter*, a national newsletter for members (consumers and professionals) containing timely information on current trends, recent legislation, marketing strategies, fundraising ideas, and more.
- State-by-state directory of home-sharing organizations:
<http://www.cohousing.org/directory>.
- Marsha Ritzdorf (June 28, 2008), "Challenging the Exclusionary Impact of Family Definitions in American Municipal Zoning Ordinances," *Journal of Urban Affairs*, Vol. 7, No. 1, pp. 15-26.
- Leo L. Cram (1993), "Shared Housing," University of Missouri Extension Web site—extensive information about shared housing, including benefits and barriers, steps to starting a program, funding, zoning issues, etc.
<http://extension.missouri.edu/publications/DisplayPub.aspx?P=GG13>.
- Abbeyfield Houses:
 - "A Brief History of the Abbeyfield Society":
<http://www.abbeyfieldberkhamstedandhemelhempstead.co.uk/history.htm>.
 - "Frequently Asked Questions," <http://abbeyfield-usa.org/faq.htm>.
 - Contact: The Abbeyfield Society Limited, 9 George Street, Hemel Hempstead, Hertfordshire, England, HP2 5HJ; Mrs. Susan Pullen, phone: 01442 217578, email: susanpullen.abbeyfield@virgin.net.
 - Abbeyfield Houses Society of Canada, Box 1, 427 Bloor Street West, Toronto, ON M5S 1X7 Canada. Contact: (416) 920-7483; Fax (416) 920- 6956; info@abbeyfield.ca; <http://www.abbeyfield.ca>.
 - Only one Abbeyfield House in the United States:
 - Abbeyfield House—nursing and personal care, 8817 Gerritsen Avenue, Brookfield, IL, 60513; (708) 387-9303):
<http://www.eldercareoptions.org/4275.html>.
- Michael deCourcy Hinds (Sunday, February 10, 1985), "Shared Housing Emerges as an Option for Elderly," *Sarasota Herald-Tribune* (from *New York Times News Service*):
<http://news.google.com/newspapers?nid=1755&dat=19850210&id=AqIcAAAAIBAJ&sjid=72gEAAAAIBAJ&pg=6565,5456332>.
- Linda Stern (December 7, 2009), "A Smaller, Kinder Way to Retire," *Newsweek* :
<http://www.thedailybeast.com/newsweek/2009/12/06/a-smaller-kinder-way-to-retire.html>.

- P. Wayland Harkey and Herbert G. Traxler (1982), "Share-A-Home: A Unique Community-Based Residential Alternative for the Dependent Elderly," *Journal of Applied Gerontology*, Vol. 1, No. 1.
- H. Traxler (1983), "SHARE-A-HOME: Economics and Logistics of Unrelated Elderly Living as a 'Family,'" *Journal of Applied Gerontology*, Vol. 2, No. 1.
- Carol A. Schreter (December, 1986), "Advantages and Disadvantages of Shared Housing," *Journal of Housing for the Elderly*, Vol. 3, Issue 3 and 4.