



**HOMESHARE AUSTRALIA
& NEW ZEALAND ALLIANCE**

11th Annual Report

1/7/2020–30/6/2021

HANZA Inc.

www.homeshare.org.au

HANZA Inc. ABN 31219342807

Reg. No. A00554275

Our vision

Supported, shared living arrangements for mutual benefit and community wellbeing available to vulnerable populations.

Our mission

To build a network of committed organisations and individuals across Australia and New Zealand that promotes policy, actions and programs around homesharing as a viable, affordable and sustainable model of supported shared living.

Our strategic goals

To promote the homeshare model

Increasing our impact on key policy and actions by working towards the acceptance and integration of homeshare options into policies and programs for vulnerable populations.

- 1.1 Participate actively in relevant inquiries, reviews, debates, discussions and conversations about quality of life and experiences in ageing, living with a disability, inclusive communities and affordable living arrangements.
- 1.2 Build networks, partnerships and collaborations with governments and organisations to make informed and expert contributions for the advancement of homesharing.

To increase the spread of homeshare programs

Supporting the establishment and development of homeshare programs in Australia and New Zealand, and building an evidence base that underpins the growth of homesharing as a viable and desirable option.

- 2.1 Provide information, advice, support, training and capacity building activities to organisations and individuals operating or aspiring to operate homeshare programs.
- 2.2 Foster the creation of on-line and face-to-face communities of practice to share and enhance homeshare program knowledge and skills.

To build HANZA into a dynamic and sustainable organisation

Ensuring that HANZA Inc. meets all legislative and regulatory requirements, is managed with integrity and accountability, and works towards financial sustainability.

Board of Management

2020–21



DEPUTY CHAIR

Tony Cavedon

BSW, BA, Diploma of Education, Diploma Business and Community Services



CHAIR

Meg Montague

PhD Sociology, BA Hons. Social Anthropology and An African Language, Graduate Diploma of Public Policy, Advanced Diploma of Group Facilitation; Graduate AICD



SECRETARY

Alexis Hughes

BA (Melb)



BOARD MEMBER

Beris Campbell

OAM, BA Diploma of Social Studies



TREASURER

Victor Oyugi

BA Economics & Sociology, MSC Project Management, CPA Australia, CPA Kenya

Chair Finance & Risk Committee



BOARD MEMBER

Heather McKee

OAM, BA, Diploma Social Studies



BOARD MEMBER

Wendy Francis

Diploma of Education, Graduate Diploma in Social Impact, enrolled Masters of Social Impact

Chair Homeshare Program Development Committee



BOARD MEMBER

Jenny Cato

Diploma Applied Science in Food & Food Service; AICD Foundation of Directorships, Cert IV in Assessment and Workplace Training

Chair Governance & Nominations Committee



BOARD MEMBER

Margot Gorski

Diploma of Arts

Chair Communications Media & Advocacy Committee

Board Chair's report: a challenging year

Well, we thought 2019-2020 was a tough year! Here in the Eastern States of Australia, and especially Melbourne and Sydney, we have had an even more challenging year in 2020-21. There does seem to be light at the end of a long lockdown tunnel; so fingers crossed for 2021-22. Through these challenging months, HANZA has kept on working. Determinedly, we remain well connected and enthusiastic about the possibilities and benefits of homesharing in a world where isolation is a major issue, affordable housing is an on-going challenge, and community involvement and mutual support grow more and more vital.

I wish to thank the HANZA Directors, our Home Share Melbourne (HSM) Manager, Carla Raynes and her team for their tireless work throughout the year. This year, three directors retired: Nancy Norton after two years as Secretary; Heather McKee, who had overseen the HSM program since 2018; and Margot Gorski, who joined the board in November but resigned due to ill health only a few months later. We thank them all for their valuable contribution.

HANZA is also fortunate with our directors who have worked so hard throughout this year: Beris Campbell, Jenny Cato, Tony Cavedon, Wendy Francis, Alexis Hughes and Victor Oyugi. As Chair, I especially thank them for their support. I know how extremely challenging this year has been as they constantly juggle their voluntary HANZA work with their paid jobs as well as their caring and community roles.

During the year, HANZA has concentrated in three areas: promoting homesharing, supporting our HSM program, and maintaining and building our internal operational systems to ensure we are efficient, accountable and sustainable. More on these is covered in this annual report, but I want to make special mention of two particular aspects: the move to independence of HSM and our advocacy work.

A much-appreciated grant from the Lord Mayor's Charitable Foundation allowed us to explore a range of sustainable financial opportunities, not just for HANZA, but also HSM. It assisted us to reach the decision in June to support HSM to transit to its own charity organisation: Bridge It. Three months of detailed discussions and negotiations led to the successful move in September 2021. We are delighted to see HSM "leave home" and wish it all the best. Congratulations to all, especially to Carla Raynes who has been HSM's program manager since HSM's inception under SPCHG and Launch Housing, through its journey as a HANZA program and now as CEO of Bridge It. Special thanks also go to Victor Oyugi, our treasurer, who has done so much this year to professionalise HANZA's financial systems and refine our capacity to report and forecast.

Our advocacy work has been challenging due to COVID and the heavy load of the HSM work. However, we have continued with our efforts to make input to the NDIS, the Aged Care reform process and the Victorian affordable housing strategy. With more capacity next year, we plan to focus on building collaborative efforts with other organisations, seeking to ensure the availability of sustainable, affordable housing options in the community, and promoting ways to expand the homeshare model to meet the needs of a range of vulnerable populations.

Finally, I want to thank our members, our supporters and homeshare participants and friends. We could not do it without you, and we look forward to a strong advocacy year in 2021-22.

– Meg Montague, HANZA Board Chair

Home Share Melbourne becomes Bridge It

Establishing a position in the sector and moving to independence



This financial year has been a watershed one for HANZA's management of Home Share Melbourne.

In this, the third year since the Program joined HANZA, Home Share Melbourne (HSM) has grown significantly in both size and scope while expanded homeshare thinking and practice were further supported by the receipt of additional funding.

While HSM started as a homelessness-focused homeshare pilot supported by HANZA, Launch Housing and South Port Community Housing Group in 2017, it can now proudly be defined as a viable model for improving the lives of those seeking safe, shared and affordable housing. During the past three years, HSM has offered homeshare to those at risk of homelessness, particularly young people and asylum seekers. In addition, to support clients with a disability, and often their families, HANZA added assessment and case management to HSM's list of services so that housing needs and capabilities of NDIS recipients could be identified and independent living successfully achieved in homesharing matches.

In May 2021, the HANZA Board sought to consolidate the future of HSM Program. A change of name, as "Home Share Melbourne" limited the program's geographical reach, was considered along with whether HANZA should become a registered NDIS provider. These considerations coincided with a much-appreciated grant to assess the financial viability of Home Share Melbourne, together with investment readiness and potential funding options for HANZA. This project, funded by the Lord Mayor's Charitable Foundation, resulted in the decision to transition Home Share Melbourne into an independent charity. Bridge It was born. Introduced in September 2021, this new entity embraces housing models that utilise homeshare principles yet offer more than homeshare.

HANZA is proud to have nurtured the HSM program to its independence and sincerely thanks Carla Raynes and her team for their immense contribution in making this journey possible. Having led Home Share Melbourne from its small beginnings, Carla will take her exemplary leadership role into a new era with Bridge It.

Key achievements in 2020–21

Matches

In July 2020 HSM supported six matches. These numbers doubled to 12 during the year. Concurrently, an additional 15 individuals living with a disability were matched in a homeshare. This was made possible with the support of intensive case management to assess their needs and find them appropriate housing.

The logo for Bridge It is written in a large, orange, cursive script font. A large orange arrow points from the text "Bridge It was born" in the paragraph above down to the logo.

Staffing

In response to the fiscal year's growth in service demands, staffing at HSM grew steadily over the 12-month period. The initial part-time team of Carla Raynes and Jenna Wilson was joined by Oliver Bates as a case co-ordinator in 2020, followed by Barbara Hill and Kate Mackenzie in 2021 as well as Christa Membrey as a part-time Finance Officer.

HANZA also drew on the experience of two HR specialists, Emma Turner and Zoe Swainston, who provided pro bono assistance to develop a range of employment policies and procedures. Their ongoing support to foster HANZA's capacity as an effective employer has been greatly appreciated.

In addition, Leonie Walker continued her impressive work as a volunteer. She has made a major contribution to strategic planning including the development of a fundraising plan, data collection and analysis, and preparation of several grant applications. Ryan Stevens also provided invaluable volunteer services, particularly with regard to business development planning for HSM.

Information and training

The growing expertise of the HSM team resulted in demand for training and assistance from other agencies, particularly those in the disability sector. Home Share Melbourne supported Manningham Transition House in the development of its financial model and intake process while Australia's largest disability training organisation, Disability Services Consultancy, engaged Home Share Melbourne to co-facilitate training sessions for the disability sector. These training activities were highly successful and have brought valuable funds to HSM and HANZA.

Funds and financial viability

HANZA received funds through a range of government COVID support measures including Job Keeper and the Victorian Government Business Support grant.

Fees from NDIS participants and donations from individuals and organisations became increasingly important to HSM's financial viability, together with grants from the Igniting Change Foundation, the Payton Foundation, the Victorian Women's Trust and the aforementioned Lord Mayor's Charitable Foundation. In addition, HSM, through HANZA, formed a consortium with SPCHG and Star Health to successfully apply for funds from the Victorian Government's Homeless to Home Program.

However, experience during the year consistently indicates that the capacity of homeshare programs to operate on a user-pay basis remains limited without a solid core of operational funds from government, philanthropy or business investment.

Conclusion

It is immensely satisfying that HANZA's management of the HSM Program has culminated in the establishment of a new and independent charitable entity. While it has been an exciting and sometimes challenging three-year journey of growth, many valuable insights and experiences were embraced along the way. Above all, thanks and congratulations go to all at Home Share Melbourne who unwaveringly have sought to support vulnerable Victorians seeking a safe, shared and affordable place to live. HANZA looks forward to continuing a long and fruitful relationship with Bridge It under the inspirational leadership of Carla Raynes into the future.

– Heather McKee, HANZA board member, HSM Working Group

HANZA Homeshare Programs

Development Committee

Key achievements

The HSPDC committee's key role, to support the establishment of homeshare programs and build an evidence base of homesharing as a viable and desirable option, could not have been better demonstrated than through HANZA's nurturing of Home Share Melbourne (HSM).

This ultimately led to HSM's emergence and transition to Bridge It, as an independent social enterprise with a homeshare focus that includes people with a disability. While this was a major achievement for the HSPDC, it clearly demonstrates the role of HANZA and the viability of Homeshare.

While Bridge It has emerged to support people with a disability, the HSPDC understands keenly that older people are also desperately looking for alternatives to residential care. The conclusion of the Aged Care Royal Commission reinforced this view. Consequently, the HSPDC has sought to use the Royal Commission findings as a spotlight to connect again with peak bodies, Aged Care Services Australia (ACSA) and Council of The Ageing (COTA).

Successful presentations and meetings were held in June, July and September to explore opportunity with these organisations to develop a collaboration focussed on innovative shared living arrangements that give older people choice and genuine alternatives to residential care. De-identified data collected from our existing HANZA members gave weight to these well-received discussions that will continue into 2022.

In addition, HANZA's ambition to expand the scale of the homeshare model as an accommodation solution for vulnerable communities is gaining traction. Separate discussions are being held with a NSW state politician, a housing foundation and a commercial enterprise to explore the scale and development of Homeshare through partnerships. In Victoria, HANZA discussions with State government housing department and community groups to explore alternative housing solutions to expensive new housing construction, are encouragingly indicating further opportunities.

On an international level, the UK Homeshare Association has secured funding to establish a business model that will forge the scale of local Homeshare arrangements and has generously offered to meet with HANZA to discuss the model in more detail.

Media attention has also been at the forefront. National and localised coverage of Homeshare appeared in the Sydney Morning Herald, ABC Radio, Aged Care Insite magazine, Community Care magazine, The Saturday Magazine and The Age, and there is prospect of future opportunities with SBS.

The raised profile of HANZA and Homeshare along with the potential partnerships exploring greater scale are positioning the HSPDC and HANZA for a very busy and successful 2022.

– Wendy Francis, HANZA board member and Chair HSPDC

NDIS and Independent Living Options (ILOs)

This year, HANZA gained opportunity to influence the NDIS on how homesharing can be integrated into its Independent Living Options (ILO) development. As a result, we have been liaising with the NDIS's ILO Team to provide feedback and brainstorming ways in which Homeshare models can be accessed by participants, alongside NDIS's development of its ILO framework.

Through our social enterprise initiative, Home Share Melbourne, we have supported people with disabilities to use their NDIS plan

to successfully enter into homeshare arrangements on an ongoing basis. HSM has done great work in exploring and designing the best, preferred housing options with NDIS participants. This groundwork prepares them for a move to a Homeshare match or an alternative solution. By developing creative ways, these participants can achieve their goals through the ILO “smorgasbord” of possibilities and successfully attain homeshare matches that genuinely increase their independence and choice while opening up new social connections.

HANZA has greatly appreciated this involvement at the forefront of developing Homeshare within the disability sector which has allowed HANZA to work closely with the NDIS in an action learning process. Partnering with Disability Services Consulting, allowed HSM to become a valuable training resource for the disability sector.

HANZA has also harnessed its learning through HSM and the experiences of other homeshare providers to develop a response to the NDIS's recent consultation paper on home and living options.

Our dream is that all people with disabilities, who are suited to Homeshare, will have the opportunity to engage with this service.

– *Tony Cavedon, HANZA Board Deputy Chair*



Home Share Melbourne match participants Ned Middleton, Duncan McArdle and Nic Simpson, as featured in a webinar conducted by the Summer Foundation about Independent Living Options.

HANZA Community of Practice

Our Community of Practice (CoP) is one of the great benefits of HANZA membership. Meeting four or five times a year, the CoP is opportunity for those organisations, currently providing Homeshare services, to come together to explore current and future issues in this space.

COVID hasn't slowed us down. In fact, it has been a catalyst to move from conference calls to online meetings over zoom and resulted in members reporting this as a much better way to connect. Most importantly, the CoP has been a valuable forum to share and together work through how best to navigate Homeshare during these uncertain days of COVID 19.

This year, the CoP continues to expand its relevance beyond the traditional matches with older people to include the exploration of new cohorts who would benefit from Homeshare matches, such as:

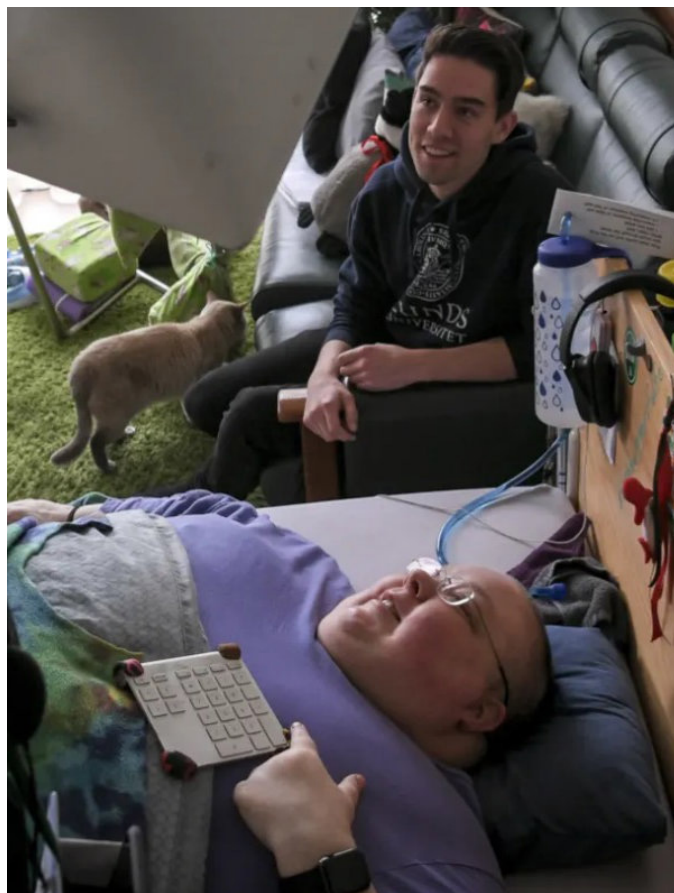
- People living with a disability
- People who are at risk of, or are homeless
- Asylum seekers

Discussion resulting from a survey of our CoP membership recognised issues such as running a social enterprise, business development, data collection, marketing, promotion and Homeshare model variations as key areas of mutual interest. These topics have been very much at the forefront of how we have shared resources, learnt from each other and continually built a collective body of data, knowledge and expertise to improve outcomes for all Homeshare matches.

During the past 12 months, we have also welcomed additional members. With membership currently across WA, NSW ACT, VIC and NZ, we have been able to keep informed about sector developments across Australia as well as internationally, while sharing the incubation and elaboration of new and creative ideas in the delivery of Homeshare matching.

HANZA thanks all Community of Practice members for their commitment and participation which has made our forums such a vibrant space in which to share, debate, learn and gather information. We look forward to welcoming new members to an even bigger and brighter 2022.

– Tony Cavedon; HANZA Deputy Chair and Chair Community of Practice



Matches like those between Josh Van Dijk (top) and Ricky Buchanan—which was featured in *The Age* and *Sydney Morning Herald* in late 2019—are helping homeshare expand beyond its traditional boundaries.

International liaison

Preparation for the 7th World Homeshare Congress is well underway. Originally deferred from 2021 to May 2022, COVID challenges required yet a further change to May 2023 with THE Homeshare, Dublin, Ireland maintaining its commitment as host.



This year has been an eventful year for Homeshare internationally. COVID served to highlight issues related to loneliness and social isolation and the urgent need to seek better housing solutions for vulnerable populations.

The US Federal Government Department of Housing and Urban Development (HUD) presented a long-awaited report on shared housing which, for the first time, gave focus to homesharing as a means of securing more creative solutions to ensure housing that is both safe and affordable. The national US homeshare body has been much encouraged by this Federal government report which formally addresses homesharing. It has also briefed HANZA regarding its details.

While there has been much promise during the past 30 years that “Homeshare’s time has come”, maybe we are seeing light at the end of the tunnel!

– Beris Campbell; HANZA Director and Trustee, Homeshare International

Treasurer's report

The financial year 2020/2021 was a big year for HANZA Inc. Impacted by the COVID pandemic, we encountered new challenges and it is pleasing that we have met them and overcome most of them.

Our revenue and operations were up considerably on our previous reporting period. Consequently, new more streamlined systems and processes were implemented in order to maximise our future impact.

The most significant change was the change of reporting from a cash basis, as in previous financial periods, to an accrual basis. This has enabled HANZA to have a more comprehensive view of our operations and performance on a period-to-period comparison.

The HSM program and government pandemic support funding were the main drivers of our revenue to \$330,049 in comparison to FY2020's \$128,502. The increased effectiveness of our operations also increased the expenditure for the period, and we closed the year with a surplus of \$9,374 in comparison to FY2020's \$13,368.

Income

Our main income was derived from our homesharing assessment, matching and support (\$164,306), donations (\$67,858), government support (\$44,359), grant income (\$38,144), and consultancy and training (\$11,818). All of these were improvements from FY2020. Membership fees were slightly down to \$1,755 from FY2020's \$1,770.

Expenditure

Salaries and wage expenses were a large part of our expenditure at \$250,096. The consultant fees of \$23,690 were from grants for a social investment assessment of HANZA and HSM. The balance of the expenses was attributable to the streamlining of our systems and processes.

Balance sheet

Many of the changes to the balance sheet in comparison to FY2020 are due to our change from cash to accrual reporting, with recognition of items carried over from one period to the next. We closed the year with total current assets of \$99,504, made up mainly of cash (\$88,252).

Our total current liabilities were \$41,079 consisting largely of leave provisions (\$17,047), tax liabilities (\$6,666), and grants in advance (\$9,931). Importantly, we maintain a strong cash balance to be able to continue our operations in FY2022.

Future challenges and opportunities

Our financial position for FY2021 was driven by the HSM program. In FY2022, now that HSM has transferred to Bridge It, our strategy is to leverage the resources at our disposal to focus on growing our membership and fundraising to increase revenue.

We have engaged an executive officer who will be the main driver in the implementation of this. We look forward to continually improving our systems and operations so we can continue to support our members and grow our advocacy.

– Victor Oyugi, Treasurer

Acknowledgements

Thank you to HANZA's partners and supporters!

Partnerships

HANZA is again grateful to The Australia Institute for their support in advocating for recognition and acceptance of Homeshare in Aged Care and Disability Services. Special thanks to Deputy Director, Ebony Bennett and Director of Research, Rod Campbell for running a very successful webinar – Ageing Well at Home - in the “Economics of a Pandemic” series. More than 700 people joined the lively and informative session in September 2020. The panel included Shadow Assistant Minister for Aged Care, Ged Kearney, Holdsworth Community's CEO, Ruth Kestermann and HANZA's Beris Campbell.



The promotional flyer for the Australia Institute's "Aged Care and Ageing Well at Home" webinar, featuring HANZA's Beris Campbell along with Shadow Minister for Aged Care Ged Kearney and Holdsworth Community's CEO, Ruth Kestermann.

For Home Share Melbourne, the partnership with Flatmates.com.au continued to be invaluable as did new working collaborations developed with housing organisations such as Wombat Housing, South Port Community Housing and Star Health.

Pro bono support

We are enormously grateful to the growing number of professionals who give so willingly of their time and expertise. Partner, Andrew Bragg and Senior Accountant, Julia Fauvette at Paris Financial have continued to provide invaluable support and advice that have assisted HANZA's responsibility as an employer and in the management of increasing budgets.

And, once again, we give special thanks to Emma Turner and Zoe Swainston for the much-needed HR advice and support they provided around employment policies and procedures.

In addition, pro bono legal advice was provided by Senior Associate, Nicole Guglielmi at K&L Gates and Principal, Chris Hartigan from Piper Alderman who generously supported HANZA as we navigated the transition of HSM to Bridge It.

Communications, Media and IT

Managing 'Comms' in the modern world of IT communications has been challenging, especially in this IT dependent second year of COVID-19. Special thanks to our board member, Jenny Cato, for dragging us into the 21st century by setting up and managing our filing and information systems in the Cloud! Also thanks should be given to our valued writer/editor Tom Hawking for producing and distributing our newsletters and other communications.

Financial support

Victorian Women's Trust

Lord Mayors Charitable Foundation

Igniting Change Foundation

The Payton Foundation

Dorman Foundation

Mamoma Foundation

Donors

We acknowledge the wonderful support of our chief benefactors: Beris, Heather, Stuart and Rod Campbell; Jenifer and Michael Wishart; Heather McKee and Anne Reese. We also appreciated a generous donation from Lee Rider. We are also most appreciative of the donations of many members and supporters.

A big thank you to everyone!



....and a final thank you to Mr Booboo, Beris Campbell's resident backyard owl, who became a fixture in HANZA's newsletters during the long, lonely lockdown months of 2020 and 2021!

HANZA Inc.

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