ALTERNATIVE HOUSING ARRANGEMENTS
A Selected Information Guide
This guide was written in consultation with Patrick H. Hare, Patrick H. Hare Planning & Design, who is nationally recognized for his writing on alternative living arrangements.

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How To Order Documents

HUD USER distributes a number of the documents announced in this information guide. Please refer to the order form on page 37 for instructions on how to order these materials.

The remainder of the documents are available directly from the performing agency or publisher whose name and address are given in the listing. Information about current prices should be obtained from the agency or publisher.

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Assessing Elderly Housing: A Planning Guide for Mayors and Local Officials


Prepared by the U.S. Conference of Mayors in conjunction with the U.S. Department of Housing and Urban Development and the U.S. Department of Health and Human Services' Administration on Aging (AHA), this planning guide was designed to help local officials develop both a framework to measure elderly housing needs and a strategy for assisting the elderly in choosing suitable and affordable living arrangements. Chapter one provides users with an overview of elderly housing in America. Subsequent chapters introduce sources as well as tools and techniques to assist local officials in taking stock of existing and potential housing opportunities for the elderly and surveying current and projected elderly population trends. The report describes the alternatives that are especially suitable for older persons and how these options may be made to fit local situations. Disadvantages to a community stemming from the creation of special zoning for the elderly include the potential isolation of older persons, problems arising from treating all older persons as though they had the same needs, and possible lowering of property standards. The report describes the provisions of several zoning ordinances established between 1974 and 1983, and notes special requirements related to accessory apartment zoning and ECHO housing. Among the communities whose ordinances are cited are Brunswick, Ohio; Clearwater, Florida; and Babylon, New York. The author cites several examples of innovative zoning for the elderly clustered housing, which permits structures to be built in close groups, thereby permitting a greater open space for infill development, which encourages building on vacant parcels of land in developed communities; incentive zoning, which divides development into broad categories and establishes standards for all developments in that category; and adaptive re-use, which involves renovating old buildings for use other than the original one. The report concludes that appropriate combinations of these strategies can meet the needs of a diverse population of older Americans while preserving neighborhood quality.

Increasing Housing Opportunities for the Elderly

Carole R. Shifman

1983, 16p. Available from American Planning Association, 1313 East 60th Street, Chicago, IL 60637 (FAS Report No. 381)

This report discusses the advantages and disadvantages of creating special zoning ordinances for the elderly, and the history of such zoning. Special zoning ordinances can authorize a range of housing alternatives that are especially suitable for older persons and how these options may be made more affordable. Disadvantages to a community stemming from the creation of special zoning for the elderly include the potential isolation of older persons, problems arising from treating all older persons as though they had the same needs, and possible lowering of property standards. The report describes the provisions of several zoning ordinances established between 1974 and 1983, and notes special requirements related to accessory apartment zoning and ECHO housing. Among the communities whose ordinances are cited are Brunswick, Ohio; Clearwater, Florida; and Babylon, New York. The author cites several examples of innovative zoning for the elderly clustered housing, which permits structures to be built in close groups, thereby permitting a greater open space for infill development, which encourages building on vacant parcels of land in developed communities; incentive zoning, which divides development into broad categories and establishes standards for all developments in that category; and adaptive re-use, which involves renovating old buildings for use other than the original one. The report concludes that appropriate combinations of these strategies can meet the needs of a diverse population of older Americans while preserving neighborhood quality.

Alternative Housing and Living Arrangements for Independent Living

Norman Blackie, Jack Edelstein, Pamela Scott Matthews, et al.

Available from National Policy Center on Housing and Living Arrangements for Older Americans, College of Architecture and Urban Planning, Institute of Gerontology, University of Michigan, Ann Arbor, MI 48109

Six alternative housing and living arrangements for older Americans are discussed in this report: shared housing, single-room-occupancy (SRO) housing, accessory apartments, ECHO housing/ granny flats, cooperatives, and mobile homes. For each, the report describes the concept and presents an analysis of current conditions, including benefits and drawbacks, costs, and resident and dwelling characteristics. Separate chapters address the costs of these alternatives in a housing assistance program, regulatory restraints, and European views on housing alternatives for the elderly. The report describes several examples of innovative zoning for the elderly, and the history of such zoning regulations. The report describes the concept and presents an analysis of current conditions, including benefits and drawbacks, costs, and resident and dwelling characteristics. Separate chapters address the costs of these alternatives in a housing assistance program, regulatory restraints, and European views on housing alternatives for the elderly. The report describes several examples of innovative zoning for the elderly, and the history of such zoning regulations.

Housing Alternatives for a New Era

Patrick H. Hare and Candice Brison


Single parents often face a sharp reduction in income following divorce, and need affordable housing. Reliable child care services, and access to other support services. Shared housing, accessory apartments, and ECHO housing may prove to be workable solutions to these special problems, since they may allow custodial parents and their children to remain in a familiar neighborhood and thereby minimize the negative impact of their changed situation. This article alerts single parents to the advantages of these alternative housing options, including extra income, child care assistance, and companionship, and provides estimates of the costs involved in installing accessory apartments or ECHO housing. Costs can be reduced if family or friends can provide loans, since recently divorced women often have no credit history and thus cannot obtain loans from banks. The authors urge single parents to take advantage of such resources as household matching services and community housing programs, and to consult with an attorney to ensure compatibility. The importance of a detailed, written agreement as to the rights and responsibilities of each party is stressed. The report describes the concept and presents an analysis of current conditions, including benefits and drawbacks, costs, and resident and dwelling characteristics. Separate chapters address the costs of these alternatives in a housing assistance program, regulatory restraints, and European views on housing alternatives for the elderly. The report describes several examples of innovative zoning for the elderly, and the history of such zoning regulations. The report describes the concept and presents an analysis of current conditions, including benefits and drawbacks, costs, and resident and dwelling characteristics. Separate chapters address the costs of these alternatives in a housing assistance program, regulatory restraints, and European views on housing alternatives for the elderly. The report describes several examples of innovative zoning for the elderly, and the history of such zoning regulations.
cause residents cannot afford to move out of homes with low mortgage rates, and declining neighborhoods as older homeowners become unable to maintain their properties. This article proposes ECHO housing and accessory apartments as solutions to these problems, since they provide a way for young families to move into established, relatively expensive communities and revitalize them. The authors point out that such arrangements offer advantages to homeowner families facing the "double dependency dilemma": the need to support both their children and their aging parents. Shared housing would allow working couples to provide essential services to the older household, while the grandparents could assist with childcare. The business community would also benefit, since female workers would be freed from some child care responsibilities and because vital, affordable neighborhoods attract skilled personnel.

Second Units: An Emerging Housing Resource

Bert Verrips
Available from People for Open Space, 512 Second Street, San Francisco, CA 94107

Adding a second unit to an existing single-family dwelling is a potentially effective, environmentally sensitive, and economically feasible response to the Bay Area's serious housing problem. If 30 percent of the suitable single-family homes in the Bay Area were converted to second units, 160,000 second units could be produced. However, because of resident concern over the impact of second units on existing neighborhoods, the development of such units is either illegal or severely restricted in most communities. The purpose of this report is to evaluate the costs and benefits of second units, and consider what regulations might be appropriate to respond to the impacts of second units while still encouraging their development. The report outlines the supply and demand factors which are stimulating interest in second units, and discusses the economics of conversion, the social and environmental consequences of conversion, and the nature of public sentiment on the issue of second units. The authors conclude that second units create affordable rents, increase income for those on fixed incomes, and enhance home security. The impact of second units on the neighborhood is slight, and the report presents appropriate regulations to mitigate any negative impact. Tabular data, appendices, and references are included.

Advantages and Disadvantages of Selected Alternative Housing Options

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Additions to the Housing Supply by Means Other Than New Construction
Duane T. McGough
U.S. Department of Housing and Urban Development,
Office of Policy Development and Research
1982, 22p., HUD-0002821
Available from HUD USER

Underutilization in American Housing: Residential Space Standards and Social Change
Martin Gellen
Available from Institute of Urban and Regional Development,
University of California, Berkeley, CA 94720

In 1980, an estimated 8 million owner-occupied dwellings contained redundant space, while 1.2 million rental units were underutilized. This working paper describes reasons for the underutilization of space in American homes: primarily the decline in average family size, the increasing number of individuals establishing separate households, and longer lifespans. Although these trends have led to a greater demand for small housing units, and a corresponding decrease in the need for large dwellings, the rising costs of housing and the expense of relocation make it economically unattractive to move out of an oversized home. In addition, young people tend to purchase housing that fits their future, rather than their current needs. Zoning ordinances also discourage conversion of large homes into smaller units. However, new construction is becoming more expensive, and will restrict the size of the homes that consumers can afford. The paper discusses the policy implications of these findings, including a need for laws that promote structural conversions of large homes into multiple dwellings. Nine tables and a bibliography are included.

Conversion of space in existing structures accounts for almost 28 percent of all units added to the national housing stock since 1973. This report defines conversions as turning nonresidential space into residential space, subdividing a large housing unit into two or more smaller units, or restoring an uninhabitable unit to habitable condition. During the 1970's, restorations actually exceeded both the losses in housing inventory and the number of new, multifamily units built, yet conversions often are not included in statistics on available housing stock. Conversions appear to be countercyclical to new production: at times of low construction, the market responds by drawing on existing resources for new units. The potential for future conversions is very high, especially since over 60 percent of households now have two or more rooms per person. This paper analyzes the conversion situation, discusses how its extent is determined, and projects trends for the future. Charts, tables, footnotes, and an appendix of data sources are included.
Assessing Elderly Housing: A Planning Guide for Mayors and Local Officials

1985, 92p.
Available from U.S. Conference of Mayors, 1620 Eye Street, NW., Washington, DC 20006

Prepared by the U.S. Conference of Mayors in conjunction with the U.S. Department of Housing and Urban Development and the U.S. Department of Health and Human Services Administration on Aging (A0A), this planning guide was designed to help local officials develop both a framework to inventory elderly housing needs and a strategy for assisting the elderly in choosing suitable and affordable living arrangements. Chapter one provides users with an overview of elderly housing in America. Subsequent chapters introduce sources as well as tools and techniques to assist local officials in taking stock of existing and potential housing opportunities for the elderly and surveying current and projected elderly needs; special attention is paid to the use of Census materials. The section on alternative living arrangements highlights accessory apartments, shared housing, ECHO housing, board and care homes, and independent living communities. Advantages and disadvantages of each option are outlined. The last chapter assesses planners in developing a community strategy for elderly housing. The charts, graphs, and diagrams in this functional guidebook contain a wide array of information and statistics related to demographics and housing needs. Sixteen appendices provide additional references, descriptions of HUD programs for the elderly, worksheets, and sample neighborhood profiles.

Increasing Housing Opportunities for the Elderly

Carole R. Shifman
Available from American Planning Association, 1313 East 60th Street, Chicago, IL 60637 (PAS Report No. 386)

This report discusses the advantages and disadvantages of creating special zoning ordinances for the elderly, and the history of such zoning. Special housing ordinances can authorize a range of housing alternatives that are not available to all for older persons and help make these options more affordable. Disadvantages to a community stemming from the potential isolation of older persons, problems arising from treating all older people as though they had the same needs, and possible lowering of property standards. The report describes the provisions of several zoning ordinances established between 1974 and 1983, and notes special requirements related to accessory apartments and ECHO housing. Among the communities whose ordinances are cited are Brunswick, Ohio; Clearwater, Florida; Plano, Texas; Greenwich, Connecticut; Montclair, New Jersey; and Babylon, New York. The author cites several examples of innovative zoning for the elderly: cluster zoning, which permits structures to be built in close groups, thereby permitting more open space; infill zoning for the elderly; and 19 alternative housing and living arrangements for older Americans, College of Architecture and Urban Planning, Institute of Gerontology, University of Michigan, Ann Arbor, MI 48109

Alternative Housing and Living Arrangements for Independent Living

Norman Blakie, Jack Edelstein, Pamela Scott Matthews, et al.
Available from National Policy Center on Housing and Living Arrangements for Older Americans, College of Architecture and Urban Planning, Institute of Gerontology, University of Michigan, Ann Arbor, MI 48109

Six alternative housing and living arrangements for older Americans are discussed in this report: shared housing, single-room-occupancy (SRO) housing, accessory apartments, ECHO housing/ground floor cooperative, and mobile homes. For each of these alternatives the report describes the concept and presents an analysis of current conditions, including benefits and drawbacks, costs, and resident and dwelling characteristics. Separate chapters address the costs of these alternatives in a housing assistance program, regulatory requirements, and innovative special provisions of several zoning ordinances established between 1974 and 1983, and notes special requirements related to accessory apartments and ECHO housing; eliminate reductions in benefits to older people in a shared living arrangement; assist State and local governments in developing model zoning ordinances to legitimate shared housing; promote greater public awareness of accessory apartment/ single-family conversion; and give manufacturers homes the status of real, rather than personal property. In some suburban single-family neighborhoods may become de facto retirement communities as large dwellings, with correspondingly high prices, become increasingly out of reach for younger families. Single parents often face a sharp reduction in income following divorce, and need affordable housing, reliable child care services, and access to other support services. Shared housing, accessory apartments, and ECHO housing may prove to be workable solutions to these special problems, since they may allow custodial parents and their children to remain in a familiar neighborhood and thereby minimize the negative impact of their changed situation. The report concludes with recommendations to single parents to the rights and responsibilities of each party is stressed. Since zoning regulations prohibit shared housing arrangements in many communities, single parents are encouraged to become active in campaigns to remove restrictions.

Saving the Suburbs for Schoolchildren

Patrick H. Hare and Linda E. Hollis
Journal of Housing for the Elderly, Vol. 1(2), Fall 1983, p. 69-76

Some suburban single-family neighborhoods may become factored retirement communities as large dwellings, with correspondingly high prices, become increasingly out of reach for younger families. This, in turn, creates a vicious cycle, with cuts in support for schools feeding to fewer or poorer schools, a lack of available houses becomes...
Second Units: An Emerging Housing Resource
Bert Verrips
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Adding a second unit to an existing single-family dwelling is a potentially effective, environmentally sensitive, and economically feasible response to the Bay Area's serious housing problem. If 30 percent of the suitable single-family homes in the Bay Area were converted to second units, 160,000 second units could be produced. However, because of resident concern over the impact of second units on existing neighborhoods, the development of such units is either illegal or severely restricted in most communities. The purpose of this report is to evaluate the costs and benefits of second units, and consider what regulations might be appropriate to respond to the impacts of second units while still encouraging their development. The report outlines the supply and demand factors which are stimulating interest in second units, and discusses the economics of conversion, the social and environmental consequences of conversion, and the nature of public sentiment on the issue of second units. The authors conclude that second units create affordable rents, increase income for those on fixed incomes, and enhance home security. The impact of second units on the neighborhood is slight, and the report presents appropriate regulations to mitigate any negative impact. Tabular data, appendices, and references are included.

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Allowing Accessory Apartments: Key Issues for Local Officials
Samuel J. Hodges, III, and Ellis G. Goldman
U.S. Department of Housing and Urban Development, Office of Policy Development and Research
1983, 23p., PDR-747
Available from HUD USER

Accessory apartments are one solution to demographic trends creating increased demand for small, affordable housing units, particularly by the elderly and other groups with low or fixed incomes. They make better use of existing housing, help maintain the property, cause minimal disruption to the neighborhood, encourage a multigenerational population, do not involve large local expenditures, provide income to financially pressed homeowners, enhance the tax base, and provide opportunities for improved government control of housing. However, citizens are often concerned that accessory apartments will place an unacceptable burden on the infrastructure and local services and hurt property values. The paper describes innovative ways that local governments have addressed those concerns through zoning, regulations, and surveys. It reviews four basic methods by which a community can permit and regulate accessory apartments: zoning ordinance, special-use permit, variance, and licensing. Also discussed are guidelines for designing regulations, monitoring, and enforcing them, and building public support for legalizing accessory apartments. The appendices contain a description of the experience of Babylon, New York, a list of local contacts, and 18 references.

Accessory Apartments: Using Surplus Space in Single-Family Houses
Patrick H. Hare, with Susan Conner and Dwight Merriam
Available from American Planning Association, 1313 East 60th Street, Chicago, IL 60637 (PAS Report No. 365)

The great increase in accessory apartment conversion activity during the 1970's was partly a result of the coincidence of a severe cutback in residential construction and a high rate of household formation. As many as 2.5 million apartments may have been created in single-family houses during that time. This report urges planners to consider both the growing demand for such apartments and the need to regulate conversions. Issues raised by conversion involve both the concerns of communities that are considering legalizing accessory apartments, such as impact on property values and neighborhood life, and questions about ordinance specifics once approval is decided, such as size, standards, and barrier-free design of the apartment. Sample provisions from existing ordinances are provided, along with explanations, on such topics as appearance, size, and construction of the apartment, as well as restrictions on the number and type of occupants. The last section of the report presents sample ordinance language and optional
Accessory Apartments: A New Housing Option for the Elderly Homeowner

Patrick H. Hare, Linda E. Hollis, and David Gutman, Ph.D.

In 1983, the Center for Study of Pre-Retirement and Aging at the Catholic University of America conducted a study of how accessory apartments work in practice for 196 elderly homeowners with accessory apartments, tenants of accessory apartments, and over­housed homeowners. The resultant report shows overall satisfac­tion among both tenants and homeowners, with 98 percent of the homeowners expecting to keep accessory apartments in their homes permanently, and 60 percent of tenants planning to stay in their apartments as long as possible. The principal reason for installing such an apartment was income, with security cited as a distant second. Nearly half of the homeowners were related to their ten­ants; 75 percent of the related tenants provided some services to the homeowner, but only 24 percent of unrelated tenants did so.

This paper examines accessory apartments and their potential to meet the housing needs of residents in the District of Columbia. It concludes that accessory housing offers several benefits, including low construction costs, spin-off economic development, and the conversion of a physical asset into a financial one. The report addresses potential problems associated with conversions such as fears that accessory apartments will strain city services, reduce property values, and displace former residents and concludes that these fears are largely unfounded based on experiences in other cities. Several options for regulating accessory apartments—special exception zoning, matter of right, limited matter of right, and overlay zoning—are presented with the advantages and disadvan­tages of each. Outreach, direct government participation, and technical assistance may be necessary to promote the use of accessory apartments and to address potential problems.

The author recommends several measures, such as publishing informational brochures on the accessory apartment concept and on obtaining zoning and other permits; making use of the media; offering tours of homes with accessory units; and holding events on the financial benefits of shared housing. Counseling for homeowners should address installing the units and managing tenants, while housematching services should receive guidance on how to provide information to homeowners and on sources of Federal funds. Eleven appendixes are included.

Accessory Apartments: A Housing Option for Washington, D.C.

Debby Goldberg

Debby Goldberg conducted a study of how accessory apartments work in practice for 196 elderly homeowners with accessory apartments, tenants of accessory apartments, and over­housed homeowners. The study concludes that the availability of voluntary or emergency technical assistance may be necessary to promote the use of accessory apartments and to address potential problems.

Accessory Apartments: Marketing the Concept and Counseling the Consumer

Patrick H. Hare

This draft report stresses the importance of counseling homeowners and prospective tenants and marketing accessory apartments after zoning ordinances have been changed to allow this form of housing.
Granny Flats: An Assessment of Economic and Land Use Issues
Arthur J. Reiger and David Engel

In contrast to other accessory housing, granny flats are separate and detached structures on the same lot as an existing single family house, are intended primarily for elderly persons, and are removable. This report examines the costs of granny flats, including the availability and terms of financing, and the ability of local land use and zoning regulations to accommodate this type of housing. Cost estimates cover three categories: initial costs, including purchase of the unit and utility hookups; carrying costs to cover financing, maintenance, insurance, utilities, and taxes; and transfer/relocation costs. Two hypothetical cases illustrate carrying and transfer costs: a single-family homeownership where an adult family member owns the unit and a scatter-site rental project where a nonprofit organization owns the flats and rents them to homeowners for an elderly relative. Most current local zoning and land use controls do not permit granny flats. Localities deciding whether to revise their regulations will have to balance the potentially significant benefits to the elderly with equally legitimate concerns about increased density, aesthetics, and other adverse impacts on the community. Granny flats are likely to be authorized only on a special permit or conditional use basis. A major issue is whether a unit can technically fit on a particular lot size; the few existing granny flat ordinances suggest that communities prefer to locate these units only in low density areas. Tables, drawings, and 23 references are provided.

ECHO Housing: A Review of Zoning Issues and Other Considerations

The use of small temporary units placed in side or rear yards, now commonly called ECHO homes, is still rare and possibly not well understood by local officials. ECHO housing is specifically intended to be used for aging parents or other relatives of an owner of a single-family home, and a permit is issued only for the use of the one or two persons designated, on the condition that the unit will be removed when the occupants no longer need it. This booklet reviews ECHO housing zoning issues, unit size requirements, lot size, the location of the unit on the lot, designs for removability, foundation types, and occupancy requirements. In some cases, retired homeowners occupy the smaller ECHO unit, while the larger house they own is occupied by other family members or rented to an unrelated family. Other issues reviewed are parking, access to the ECHO unit, compatibility of the ECHO unit with
surroundings, application procedures, and concerns such as energy efficiency and taxes. The few existing zoning regulations are described wherever applicable, particularly those from California communities that specifically allow ECHO housing. An appendix includes California’s enabling legislation on ECHO unit size and applications as well as ordinance material from four communities.

**ECHO Housing: Recommended Construction and Installation Standards**

Ronald L. Mace and Ruth Hall Phillips

1984, 42p.
Available from American Association of Retired Persons, 1909 K Street NW, Washington, DC 20049

This document presents technical standards for the design, construction, installation, and removal of ECHO units. These standards cover general construction and planning considerations, size of ECHO units, aesthetics, energy efficiency and thermal protection, safety and security, maintenance, certification, site placement, ground anchor, attachment, utility hookup, and removal and site restoration. They are presented in lists of “requirements” for ECHO unit construction and “recommendations” for added safety and serviceability. Illustrations show sample adaptable bathrooms, adaptable kitchens and summer and winter porch configurations, a complete one-bedroom unit, floor plans for efficiency and one-and-two-bedroom units, and several grounds and entrance options. All material is written and illustrated to be easily understood by laypersons. Commonly used and long-established building standards developed for other types of housing are referenced, and these published standards are listed in an appendix under the topics of accessibility, general construction, site installations, electrical, plumbing, heating and air conditioning, and fire safety.

**Assessment of “Ohana Zoning”**

1985, 13p.
Available from Department of Land Utilization, City and County of Honolulu, 650 King Street, Honolulu, HI 96813

This review of the city and county of Honolulu’s “ohana” (extended family) zoning encompasses regulatory and administrative aspects of infrastructure, housing, and legal/procedural issues. Infrastructure issues include problems resulting from ambiguities in criteria for sewers and for traffic safety; the lack of reliable estimates of excess sewer capacity in areas where ECHO-type units might be located has led to overloading in some cases, and to subsequent denial of permits. Cesspools, a possible solution, are currently prohibited. The Departments of Public Works and Transportation have issued new criteria for access streets and driveways to remedy existing problems; they include standards for width, grades, and curves.

and requirements for adequate turnaround space, road shoulders, and sidewalks. Housing issues include policies related to sale of the units under the Horizontal Property Regime (HPR), which affects price and creates possible conflicts with the Comprehensive Zoning Code (CZC). Legal and procedural issues have been raised regarding the lack of definitions for ohana dwellings in the CZC. The permit process is also inefficient and cumbersome. The report concludes with three recommendations for changes to the CZC: to delete the term “ohana” in order to avoid ambiguities in code provisions; to treat second dwellings of this type as accessory units and limit the floor area so that units remain affordable; and to retain the requirement for public facilities clearance but delete specific infrastructure standards.

A brochure entitled “Ohana Housing: A Program Evaluation” describes the successful ohana housing program since its inception in 1982. A chart presents characteristics of the ohana units and their occupants, design and construction specifications, costs incurred, and financing options. The brochure is available from Building Department, City and County of Honolulu, 650 King Street, Second Floor, Honolulu, HI 96813
Stephen R. McConnell, Ph.D., and Carolyn E. Usher
1980, 52p.
Available from Lexington Books, D.C. Heath and Company,
125 Spring Street, Lexington, MA 02173
This report presents the results of studies conducted by the
University of Southern California, including surveys of middle-aged
and older homeowners and of students regarding their views and
experiences of home-sharing, case studies of five older persons
sharing their houses with younger people, analyses of two house-
sharing agencies (one in California and one in New York), and
interviews with community leaders that explored institutional
barriers to shared housing. The study found that house-sharing
could be effective if owners and tenants were carefully matched.
Recommendations include abolishing zoning ordinances that re-
strict the number of unrelated individuals living in single-family
homes, putting the Independent Group Residences portion of
HUD's Section 8 Program into operation; revising Supplemental
Security Income program policies that inhibit shared housing; and
eliminating Food Stamp provisions that reduce benefits for shared
meals. Finally, the authors urge that government and private or-
ganizations develop and promote house-sharing as a viable living
option for young and old. Appendices include a resource directory
for house-sharing projects, a sample home-sharing agreement, and
a condensed homeowners survey.

Room for Rent: Shared Housing With Nonrelated Older Americans
Carol A. Schreter
Available from University Microfilms International, 300 N.
Zeeb Road, Ann Arbor, MI 48106
This study defines shared housing to include three related situa-
tions: self-initiated home sharers, agency-assisted home sharers,
and agency-sponsored home sharers. The study compares and
analyzes these groups in terms of a number of demographic and
housing-related variables. Data from the 1980 national Housing
Choices of Older Americans Survey on self-initiated home sharing
arrangements found that they accounted for 2.5 percent of all older
households, were located in expensive metropolitan areas, and
involved persons in good health and near retirement age. Personal
interviews in 1982 with clients of a housemate matching service
and group household members in the Washington, D.C., area
found that one-third of agency-assisted home sharers were disabled
or age 75 and older; residents of agency-sponsored households
were found to be generally quite old, with functional limitations.
National Policy Workshop on Shared Housing—Findings and Recommendations

Dennis Day-Lower, Drayton Bryant, and Joan Ward Mullaney


Available from Shared Housing Resource Center, Inc., 6344 Greene Street, Philadelphia, PA 19144.

In 1982, the Shared Housing Resource Center, under a grant from the Department of Housing and Urban Development, convened a 2-day symposium to consider shared housing as an affordable housing option for the growing number of members of nontraditional groups: the elderly, one-parent families, single persons living alone, young families, and persons with physical or mental health problems. The 150 participants included builders, architects, realtors, shared housing practitioners, representatives of the business and financial communities, lawyers, educators, students, the clergy, and Federal, State, and local officials. The symposium defined the social and financial advantages of shared housing and made recommendations to Federal, State, and local government, community and service organizations, foundations, lending and investing institutions, educational institutions, and religious organizations. Suggestions addressed program planning, development, finance, community issues, and resident management issues. Participants agreed that all groups involved—government, researchers, community groups, and the public—require better information about home sharing and that a stronger marketing approach is needed to make the concept viable. Among the recommendations were that government at all levels endorse shared housing as a program priority, provide low-interest loans and tax incentives to make shared housing an attractive option, and provide loan guarantee assistance to shared housing programs; that community and service organizations and educational institutions provide technical assistance to local sponsors, develop public information and public relations materials to increase community acceptance, and promote involvement of residents in order to keep costs down; and that researchers document existing shared housing programs, study the effectiveness of matching programs, survey community attitudes, and identify the types of financial incentives needed.

Shared Housing for Older People: A Planning Manual for Group Residences

Dennis Day-Lower

1982, 73p.

Available from Shared Housing Resource Center, Inc., 6344 Greene Street, Philadelphia, PA 19144.

This comprehensive guide was developed for developing shared residences for older people, using single-family homes and apartment buildings located throughout a community rather than large, congregate developments. Suggestions addressed program planning, design and development, finance, community issues, and resident management issues. Participants agreed that all groups involved—government, researchers, community groups, and the public—require better information about home sharing and that a stronger marketing approach is needed to make the concept viable. Among the recommendations were that government at all levels endorse shared housing as a program priority, provide low-interest loans and tax incentives to make shared housing an attractive option, a shared housing pro forma budget, and a sample resident application and lease agreement.

Congregate Housing for Older People—A Solution for the 1980's

Robert D. Chellis, James F. Seagle, Jr., and Barbara Mackey Seagle

1982, 228p.


Congregate housing, which has the combined advantages of offering privacy and access to shared services, is a promising answer to the housing needs of our expanding elderly population. Through contributions by gerontologists, behavioral scientists, planners, architects, and housing specialists, this book addresses many facets of designing housing programs for the elderly, and examines the environmental and psychological barriers embedded in standard designs. Chapters give step-by-step procedures for establishing objectives, selecting a development consultant, a site, and an architect; applying for funding; integrating facilities and services; and designing personal environments for senior citizens. The discussion covers the positive and negative aspects of grouping older people, ways to design the most effective housing for a specific housing plan. The book also addresses factors to consider in deciding whether to construct new housing or rehabilitate existing structures. Tables, diagrams, charts, references, and an index are supplied.
The Art of Matchmaking: A Case Study in Shared Housing

David C. Pritchard, Ph.D.

The Gerontologist Vol. 23(2), April 1983, p. 174-179

Findings of a descriptive study revealed that economy, companionship, and the need for services were important motivating factors in home sharing, but that most shared living arrangements are of short duration. The study, conducted in San Diego from 1981 to 1982, surveyed a population of 699 older adults registered with a shared housing project. A larger number of home providers than tenants were enrolled in the program; one unexpected finding was that many tenants were more interested in temporary sharing arrangements—for instance, immediately following an illness—than in permanent home sharing. Maintaining tenant interest required more frequent contact with project staff. For home providers, the most important motivation was the need for in-home services, while the majority of tenants were looking for free housing or reduced rent in order to survive on marginal incomes. The first 3 months of shared living appeared to be crucial for success. At the conclusion of the study period, 63 percent of the matches had dissolved; a major cause of dissolutions was noncompliance with specific expectations that had governed the original agreement. The study concludes that more descriptive and demographic data are needed to understand critical variables and professional practices that affect housing resource.

Planning and Developing a Shared Living Project: A Guide for Community Groups

1980, 120p. Available from Action for Boston Community Development, Inc., 178 Tremont Street, Boston, MA 02111

Using this handbook, neighborhood and grassroots community groups as well as elderly persons can plan and develop congregate housing that serves from 3 to 40 elderly people. The guidelines emphasize two needs: to involve the people who expect to live in the home in the planning process and to maintain a balance between personal independence and shared responsibility in the living situation. The guide is illustrated with case examples of formal, preplanned shared living projects in the diverse Massachusetts communities of Somerville, Cambridge, Jamaica Plain, and the Back Bay area of Boston. The projects shared several characteristics: lower costs than more traditional housing, adaptability to changes in the needs of the residents as they grow older, a combination of com-

The Existing Resources and Affordable Housing Issues in Rural Areas


Data indicate that shared living arrangements of all types may be gaining acceptability among rural residents. This report describes several different types of arrangements that low-income rural residents can use to improve their housing situation, especially in view of recent Federal cutbacks in rural housing assistance. Intergenerational shared living arrangements may offer the greatest potential for reaching the low-income range, since younger members may absorb the extra burdens of providing maintenance and cooking and rural residents are accustomed to mixed ages in extended family situations. Thus, referral services that match elderly homeowners with younger renters may be an increasingly useful approach. Cooperative and congregate housing may also increase housing affordability, although some type of subsidy is needed to reach lower income groups. Community land trust organizations are developing plans to house low-income rural residents who will save on shelter costs through innovative housing designs, minimal land costs, and use of land trust resources.

The art of matchmaking: a case study in shared housing

Planning and developing a shared living project: a guide for community groups

The existing resources and affordable housing issues in rural areas
The materials listed in this section are brief, general interest items which provide background information and overviews of selected alternative living arrangements. Many can be used by local advocates to promote and build support for alternative housing options.

**American Association of Retired Persons**

The American Association of Retired Persons (AARP) Housing Program has developed a series of resources on alternative living arrangements for older Americans. They include:

- **A Model Ordinance for ECHO Housing**, by Patrick H. Hare and Linda E. Hollis. This 12-page pamphlet provides a resource and checklist for use in amending zoning to permit ECHO housing.
- **Accessory Apartments Fact Sheet.** A one-page fact sheet defines accessory apartments, and lists advantages, disadvantages, and restraints on this type of housing.
- **ECHO Housing Fact Sheet.** This one-page fact sheet describes ECHO housing and outlines issues involved in obtaining permits and setting up units.
- **Legal Issues in Elder Cottage Housing Opportunity (ECHO): Restrictions on Manufactured Housing, Legal Issues in Accessory Apartments, Zoning and Covenants Restricting Land to Residential Uses, and Legal Issues in House Sharing: What Is a Family**, by Helen E. Hedges, J.D., are brief summaries of relevant court decisions affecting alternative housing options. The papers are based on a review conducted in 1982, and are designed to help both homeowners and tenants.

**Housing Options for Older Americans**


This educational booklet introduces older people to various housing options, including manufactured homes, accessory apartments, ECHO housing, home-matching programs, and shared housing. Each section outlines the advantages, disadvantages, legal issues, and costs involved in the option. A section on Federal programs and senior housing, a glossary of housing terms, a resource list for each option, a list of HUD Field Offices, and some sources of additional information are also included.

**ECHO Housing**

79 slides with 15-minute audibly cued tape

This slide-tape presentation defines ECHO housing and describes its advantages—notably, lower cost and the combination of independence and proximity to family members. It shows how ECHO houses are built and how they can be placed, but warns viewers that they may need to change zoning restrictions before the units can be installed in their communities. It also directs older people to sources of additional information. A 32-page booklet, **ECHO Housing: A Review of Zoning Issues and Other Considerations**, (see page 19 of this guide) is included with the program, as are a program script and copies of the **Echo Housing Fact Sheet**.

**All of the resources listed above are available from the American Association of Retired Persons, 1909 K Street NW., Washington, DC 20049.**
Shared Housing Quarterly
Annual subscription; bulk subscription rates available.
Available from Shared Housing Resource Center, Inc.,
6344 Greene Street, Philadelphia, PA 19144
This newsletter includes practical information to ensure successful homeowner cooperation, a calendar of meetings, lists of housing programs, legal updates, and summaries of research projects and case studies. It is targeted to both professionals and consumers.

San Francisco Development Fund Seeks Cities to Participate in Demonstration Second Unit Program
Available from San Francisco Development Fund, 1107 Oak Street,
San Francisco, CA 94117
The San Francisco Development Fund (SFDF), a non-profit organization that conducts short-term housing demonstration programs in the Bay Area, has recently launched the Double Unit Opportunity (DUO) Program, which is described in this 2-page fact sheet. Recent experience has shown that very few second units are actually created in areas where ordinances permitting them have been passed. By providing operational assistance, including staff support and homeowner counseling, the DUO program seeks to promote the creation of accessory apartments and ECHO housing units. These versatile little homes, built to the Commission's specifications, can result in long waiting lists. To accommodate property owners and their elderly relatives or friends, the Housing Commission of San Francisco now allows private financing, but the units must still be built to the Commission's specifications.

Pursuing the Potential of Accessory Apartments
Patrick H. Hare and Elissa J. Rozov
This brief article suggests that accessory apartments can benefit the housing market by making larger homes more attractive to investors and provide loan guarantee assistance to shared housing programs; that community and service organizations and educational institutions provide technical assistance to local sponsors, develop information and public relations materials to increase community acceptance, and promote involvement of residents in order to keep costs down; and that researchers document existing shared housing programs, study the effectiveness of matching programs, survey community attitudes, and identify the types of financial incentives needed.

Case Study: Australian Granny Flats Keep Families Together
Urban Innovation Abroad, Vol. 1(1), November 1977, p. 2
"Granny Flats," Australia: Year Four
Urban Innovation Abroad, Vol. 4(1), January 1980, p. 4
These two articles briefly describe the introduction and history of "granny flats" in Australia, where the scheme was instituted some 10 years ago. The popularity of the government-run program has resulted in long waiting lists. To accommodate property owners and their elderly relatives or friends, the Housing Commission of Victoria now allows private financing, but the units must still be built to the Commission's specifications.

The Elder Cottage
Available from Coastal Colony Corporation, Box 452-A, R.D.4,
Manahawkin, NJ 08050
This brochure describes the concept, design and use of "elder cottages," also known as ECHO housing units. These versatile modular units can be located next to an existing single-family house, organized in small clusters to become miniature neighborhoods, or placed immediately adjacent to one another and/or stacked to form a continuous wing while still offering a completely self-contained living unit for the resident. Standard specifications for elder cottages and building codes to which the elder cottage conformance is provided.

Shared Housing for Older People: A Planning Manual for Group Residences
Dennis Day-Lower
1983, 72p.
Available from Shared Housing Resource Center, Inc., 6344 Greene Street, Philadelphia, PA 19144
This manual gives detailed, practical steps for developing shared residences for older people, using single-family homes and apartments located throughout a community rather than large, conglomerate, newly constructed facilities. It discusses specific types of sponsor sharing, selecting the site, financing local codes, designing shared housing, selecting the site, leasing local codes, designing the facility, budgeting, financing, reducing liabilities, recruiting residents, and managing the household. It also describes the role of sponsor in developing and overseeing the shared housing project; site selection issues, zoning, housing, and fire codes; and design considerations, including accessibility for disabled residents. The budgeting section considers renovation and operating costs, and the financing chapter discusses sources of funding. Possible concerns such as financial liability for sponsors and entitlement assistance reduction for residents are explored. The resident recruitment and household management chapters discuss detailed plans and pitfalls associated with these continuing responsibilities, many of which can be assessed by residents using cooperative decision-making. Appendices include excerpts from court zoning decisions, a shared housing pro forma budget, and a sample resident application and lease agreement.

Congregate Housing for Older People—A Solution for the 1980's
Robert D. Chellis, James F. Seagle, Jr., and Barbara Mackey Seagle
1982, 228p.
Available from Lexington Books, D.C. Heath and Company, 125 Spring Street, Cambridge, MA 02138
Congregate housing, which has the combined advantages of offering privacy and access to shared services, is a promising answer to the housing needs of our expanding elderly population. Through contributions by gerontologists, behavioral scientists, planners, architects, and housing professionals, this book addresses many facets of designing housing programs for the elderly, and examines the environmental and psychological barriers embedded in standard designs. Chapters give step-by-step procedures for establishing objectives; selecting a development consultant, a site, and an architect; applying for funding; integrating facilities and services; and designing personal environments for senior citizens. The discussion covers the positive and negative aspects of grouping older people with different abilities, and ways to determine the potential market for a specific housing plan. The book also addresses factors to consider in deciding whether to construct new housing or rehabilitate existing structures. Tables, diagrams, chapter references, and an index are supplied.

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3 months of shared living appeared to be crucial for success. At
the conclusion of the study period, 63 percent of the matches had
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specific expectations that had governed the original agreement.
The study concludes that more descriptive and demographic data
are needed to understand critical variables and professional prac­
tices that affect this housing resource. Four tables and 13 references
are included.

Planning and Developing a Shared Living Project: A Guide for Community Groups
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Using this handbook, neighborhood and grassroots community
groups as well as elderly persons can plan and develop congregate
housing that serves from 3 to 40 elderly people. The guidelines
emphasize two needs: to involve the people who expect to live in
the home in the planning process and to maintain a balance between
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situation. The guide is illustrated with case examples of formal,}
preplanned shared living projects in the diverse Massachusetts
communities of Somerville, Cambridge, Jamaica Plain, and the Back
Bay area of Boston. The projects shared several characteristics:
lower costs than more traditional housing, adaptability to changes in
the needs of the residents as they grew older, a combination of com­
pensionship with the necessary degree of privacy, and the ability
to blend into the surrounding neighborhood. Advice on planning
shared living projects focuses on the first organizing steps, methods
of deciding on an action plan, planning the living space, meeting
needs for outside services, promoting harmonious living, financing,
and securing the human resources needed to provide expertise and
services. Illustrations, 33 references, and appendices that give the
addresses of agencies and organisations and lists related materials,
are included.

The Existing Resources and Affordable
Housing Issues in Rural Areas
Available from Housing Assistance Council, 1025 Vermont
Avenue NW., Suite 606, Washington, D.C. 20005

Data indicate that shared living arrangements of all types may be
gaining acceptability among rural residents. This report describes
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dents can use to improve their housing situation, especially in view
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1984, 42p.

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Shared Housing Quarterly
Annual subscription; bulk subscription rates available. Available from Shared Housing Resource Center, Inc., 6344 Greene Street, Philadelphia, PA 19144.

This newsletter includes practical information to ensure successful homesharing, a calendar of meetings, lists of homesharing programs, legislative updates, and summaries of research projects and case studies. It is targeted to both professionals and consumers.

San Francisco Development Fund Seeks Cities to Participate in Demonstration Second Unit Program
Available from San Francisco Development Fund, 1107 Oak Street, San Francisco, CA 94117.
The San Francisco Development Fund (SFDF), a non-profit organization that conducts short-term housing demonstration programs in the Bay Area, has recently launched the Double Unit Opportunity (DUO) Program, which is described in this 2-page fact sheet. Recent experience has shown that very few second units are actually created in areas where ordinances permitting them have been passed. By providing operational assistance, including free staff support and homeowner counseling, the DUO program seeks to promote the creation of accessory apartments and ECHO housing where ordinances allowing them are already in place. When the pilot is complete, SFDF plans to prepare a final report on the second unit demonstration which should provide insights to other localities interested in promoting second units in the future.

Pursuing the Potential of Accessory Apartments
Patrick H. Hare and Elissa J. Rozov
This brief article suggests that accessory apartments can benefit the housing market by making larger homes more attractive investments for persons who need additional income and by reducing turnover in neighborhoods. It calls for conditions of interested citizens to work toward lifting zoning restrictions on this form of housing.

Case Study: Australian Granny Flats Keep Families Together
"Granny Flats," Australia: Year Four
These two articles briefly describe the introduction and history of "granny flats" in Australia, where the scheme was initiated some 10 years ago. The popularity of the government-run program there has resulted in long waiting lists. To accommodate property owners and their elderly relatives or friends, the Housing Commission of Victoria now allows private financing, but the units must still be built to the Commission's specifications.

San Francisco Development Fund
• Allows Accessory Apartments: Key Issues for Local Officials
• The Home Conversion Loan Program
• A Selected Reference Guide to Fair Housing
• Housing for the Elderly—A Selected Bibliography
• Selected Resource Guide on Accessible Environments for the Disabled
• The Experimental Housing Allowance Program—Selected References
• Affordable Housing—A Selected Resource Guide

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A Selected Reference Guide to Fair Housing
Housing for the Elderly—A Selected Bibliography
Selected Resource Guide on Accessible Environments for the Disabled
The Experimental Housing Allowance Program—Selected References
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Alternate Housing Arrangements: A Selected Information Guide describes alternative living arrangements and outlines ways in which they can be promoted. It presents a selection of topical publications with abstracts and lists organizations to contact for more information.

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