



Welcome to the Homeshare Practice Guide

Homeshare brings people who need support and people who need accommodation together to achieve something that is vital to both, without great cost to either. In many countries it is already helping thousands of people. We need to build on the success of the UK's Homeshare pioneers to make Homeshare a mainstream part of how we help older people and others to live independently, whilst helping younger people and others to access accommodation as they study or build a career.

There are three reports:

- Homeshare: the key facts for policy-makers - how might the UK unlock the potential for Homeshare to become mainstream?
- Homeshare: the key facts for commissioners – how Homeshare could help ordinary people to contribute to housing and independent living goals in your area.
- A detailed good practice guide for those developing and implementing Homeshare, including many practice examples from around the world.

These can be viewed and downloaded free of charge at www.naaps.org.uk.

Please get in touch if you would like any more information about Homeshare and the support that NAAPS offers to its members.

There is a list of contacts and links inside the back cover.

Alex Fox
NAAPS Chief Executive

FOREWORD TO THE REVISED HOMESHARE PRACTICE GUIDE



Paul Burstow MP
Minister of State
for Care Services

Homeshare offers a simple, effective and low-cost way of meeting housing and support needs.

Homeshare can help people to live the lives they wish to live in their local community. It is a low cost preventative service, because it helps families and communities to provide more for each other rather than relying on expensive interventions by the state. It can bring people together across divides of age, ethnicity, class and culture.

I am pleased to welcome this guide, which incorporates learning from two Department of Health funded pilot programmes in West Sussex and Oxfordshire. The Guide provides comprehensive information about the procedures and processes that need to be in place for a Homeshare programme to be successful and safe. It is a vital tool for anyone wishing to commission or set up an effective Homeshare programme and is central to the development and growth of Homeshare in England.

A handwritten signature in black ink that reads "Paul Burstow". The signature is written in a cursive, flowing style.

HOMESHARE PRACTICE GUIDE

CONTENTS

Contents

Part One – Introduction to Homesharing	4
Part Two – The risks and benefits of Homeshare	10
Part Three - Setting up a Homeshare programme	14
Part Four – Community, partnerships and social marketing	19
Part Five - Staffing your Homeshare programme	24
Part Six – Matching, monitoring and endings.....	27
Part Seven: Legislation (England) and Homeshare	56
Part Eight. Finances and Funding.....	66
Model Homeshare Agreement	70
Acknowledgements and thanks	76
Contacts.....	77

Please note

A number of complex areas of law are relevant to Homeshare (see Part Seven). Legislation and guidance in these areas change constantly. This guide is an attempt to give an overview of good practice at the time of writing. It is not intended as a substitute for expert legal advice. Organisations and individuals are strongly advised to obtain their own expert and legal advice before embarking upon any Homeshare activity.

This guide refers to legislation, guidance and regulation which apply in England but not necessarily in the other UK nations where there are considerable differences in the legislative and regulatory frameworks.

Part One – Introduction to Homesharing

What is Homesharing?

Homeshare is a simple way of helping people to help each other. A Homeshare involves two people with different sets of needs, both of whom also have something to offer.

Householders are people who have a home that they are willing to share but are in need of some help and support.

Homesharers are people who need accommodation and who are willing to give some help.

Prudent matching of both groups gives the Householder the help and security they require and the Homesharer the home they seek, both at reasonable cost.

Householders must have a home or property that they own or rent and which is suitable to accommodate another person. Both parties must be willing and able to commit to the arrangement for an agreed length of time, although this commitment is not binding.

Key point

Many housing and or/support services inadvertently place the user of the services in the position of “recipient” and the people who provide that service in the powerful position of “provider”.

In Homeshare both participants gain from the arrangement, giving and receiving in equal measure. Operating within the principle of mutuality, both parties feel valued and respected for their contribution and can enter the arrangement with dignity and enthusiasm.

Homeshare is run by a *Homeshare programme* or Scheme that employs Homeshare Programme Co-ordinators. Co-ordinators have the task of finding and vetting suitable Householders and Homesharers and introducing them to each other. Co-ordinators provide the help and support to keep the Homeshare arrangement working well for both parties.

What Homesharing is not

Even though Homeshare is a very simple concept it can often get mistaken for other kinds of services and arrangements such as

- Live-in care
- Live-in Housekeeper
- Simple lodger arrangements

It is essential that any new Homeshare projects or programmes are clear in advance about www.naaps.org.uk

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the boundaries of Homeshare if they are to be successful.

The benefits for communities

Building communities and relationships across generations and other divides

- Homeshare has evolved in response to more geographically scattered families who may struggle to meet all of a relative's support needs whilst maintaining employment some distance away.
- Homeshare enables people to form relationships with people they might not ordinarily get to know. It can lead to people, their families and friends forming links with people from different generations, races, social background and religions, which can last for many years.
- The act of supporting each other in a Homeshare arrangement can give both parties a sense of value and esteem that they may find it difficult to find elsewhere, with Householders able to prolong their active participation in society.
- Homeshare brings people into communities that they might not otherwise be able to live in for financial or other reasons. For example, it has the potential to bring younger people into communities inhabited primarily by older people.

Practice example

The Homeshare programme run by Jackie Grossmann in Chicago USA is part of a wider organisation called Interfaith Housing Centre of the Northern Suburbs.

Interfaith believes that people have a right to fair and affordable housing without discrimination because of their age, race or religion. It uses the Homeshare programme to actively challenge discrimination and prejudice and to breakdown barriers within communities by making inter-faith, inter-race and inter-generational matches.

A better use of resources

- Homeshare enables people to live in their own home and get the support they need in a relatively informal and inexpensive way.
- Homeshare makes use of housing stock that would not otherwise be available to the community.

Benefits for people with support needs

Groups who benefit from becoming a Householder include:

- Older people for whom living alone causes anxiety or isolation, particularly where family and friends cannot provide full time support.
- Disabled people who are moving towards independent living may benefit from some help or support from a Homesharer. Young people with a disability sometimes prefer a Homesharer of their own age as they make the transition into adulthood.
- People who are caring for a relative, friend or parenting a child in challenging circumstances can feel alone and unsupported in their role.
- People with mental or physical ill health may benefit from extra support, support with maintaining a medication regime or help with tasks such as reading mail, where a person has a visual impairment.

Greater choice and control

- Homeshare allows people to maintain their friendships, relationships and community links, gaining new independence or remaining in their own homes with safety, dignity and peace of mind.
- Homeshare does not feel like a support service, which can be vital for many older people who are very reluctant to see themselves as “service users”.
- Homeshare allows people who need a little support but who are not eligible for financial help with that to save money which can then be used to purchase support at a later date.

Health and wellbeing

- More decent meals and some hours of companionship can have a marked impact on a person’s health, anxiety levels and sleep. Householders may provide prompts to take medication or contribute to health in other ways.

Practice Example

Omar is 42 and has a learning disability. He lives in a three-bedroomed local authority property in outer London. Omar lives with his Homesharers, Kat and Joe, who are a young couple from New Zealand. Kat and Joe support Omar to care for his pets and remind him to attend to his personal hygiene. Everyone in the household shares the shopping, cooking and housework tasks. Omar and Joe both like to watch Western movies, regularly go to the local pub together and are members of the darts team.

Joe works at a garden centre which is very close to Omar’s home, resulting in a very short daily commute. Joe brings home unwanted plants and helps Omar to incorporate them into his garden which is beautiful as a result. Joe and Kat give Omar the confidence to meet new people and visit new places, in a way that he would not be able to do on his own.

Omar has a part time job, is an active member of a local support group for people with a disability and is also a regular at a drop-in club where he has many friends. The Homeshare Programme Co-ordinator met Omar through work with this club. Omar has become an ambassador for Homeshare, helping the Co-ordinator to make many more useful contacts.

Benefits for people who lack housing

People (both single people and couples) who could benefit from becoming a Homesharer include:

- People with limited means, who are saving up to buy or rent their own place or who have financial difficulties.
- Students needing accommodation near their place of study including those from overseas.
- People leaving jobs that provided them with housing or who are relocating or move around frequently.
- People in low paid jobs who work in an expensive area – including essential public services workers.
- People facing a life change such as a divorce or bereavement and some women escaping domestic violence.

- People who may face prejudice and discrimination when seeking housing.
- People, usually young women, who for religious reasons do not want to live alone or with people of the opposite sex.
- People with a learning disability who do not want to live alone but could offer a great deal to a Householder.

Tackling more than just housing problems

- Homeshare enables Homesharers to live in places that they ordinarily would not be able to afford.
- Homeshare enables people to take time out from paying housing costs giving them a chance to save this money to help them save, take up a job opportunity in a particular area or reduce debts.
- Homesharers live with people who have a wealth of life experience, knowledge and skills. They may learn new skills or develop themselves and their lives.

Practice example

Anna is a student nurse who moved to Sydney, Australia from Europe and was very concerned about the cost of housing in the area where she works and studies.

Anna contacted the Homeshare programme run by the Benevolent Society and was successfully matched to live with Irene, who wanted some support in order to continue living independently.

Irene has a beautiful house in the most expensive area of Sydney. It overlooks the harbour and she has lived there for many years. At the top of the house is a bedroom, bathroom, small sitting area and outside terrace that are used by Anna. Anna would never have been able to consider living there without Homesharing.

Anna is able to use a moped to get to work and college and has also saved money and resources she would have used to travel had she lived elsewhere. Anna hopes to buy a place of her own in the near future once her studies are over and she gets a full time nursing position.

Benefits for family carers

Sustaining care at home

- Homeshare can help families cope with the increasing support needs of an older or disabled relative.
- Many families are geographically scattered, with family carers struggling to maintain caring without losing employment and constantly worried about their relative.

The policy background

The government Health and Social Care White Paper, "Our Health, Our Care, Our Say" was published in January 2006 and builds on the 2005 Green Paper "Independence Wellbeing and Choice". Together, these documents set out a 15-year vision and strategy for adult health and social care which put the individual at the heart of service delivery,

with a radical shift away from the notion of “welfare” and “being done unto” towards independence and the role the community can play in supporting people to live independently. Both papers address the issue of risk and propose ways to minimise risk while enabling people to live as normal a life as possible.

The Putting People First (PPF) concordat published in December 2007 focuses on four key areas: universal services, prevention and early intervention, choice and control and support closer to home.

The adult health and social care Green and White Papers and PPF take forward themes that are also in a number of recent government strategy documents, including Valuing People, Improving the Life Chances of Disabled People and The National Service Framework for Older People and ‘A Sure Start to Later Life’. There are similar initiatives in other areas of government that are promoting choice and greater individual control of services including personal budgets, fostering citizenship and developing communities to help them to deliver local solutions to local problems.

Homeshare is well established as a model of support and housing in several countries around the world. The Green Paper “Independence, Well Being and Choice” gave Homeshare as an example of innovative practice.

Homeshare does not however fit neatly into the “care” and “housing” pigeon holes into which local commissioners and funding bodies usually place services. This factor has acted as a barrier to the development and the spread of the Homeshare model.

The Department of Health recognises the potential of Homeshare in England and sponsored a demonstration project, initially through the Home Office funded Change Up programme. The main outcome of the first year of the project was a 2006 Practice Guide which brought together practice from Homeshare projects across the world.

The Practice Guide pulled together and built upon the operational manuals previously developed by existing Homeshare programmes. This second edition has been revised in the light of lessons learned from the NAAPS Homeshare pilots and from other Homeshare practice around the world.

The History

The idea of Homesharing is not new and happens informally in many countries and cultures around the world.

The Homeshare concept in a more structured form first developed in North America in the 1970s and was brought to England over 20 years ago by an enterprising woman called Nan Maitland. Nan saw that there was a gap in support services for older people and saw Homeshare as a way of filling this gap.

Practice example

The Homeshare programme run by Age Concern in Hertfordshire was set up specifically to offer older people an opportunity to get the support they need. It ran alongside other services and support offered by Age Concern and the Homeshare Programme Co-ordinator was based in an office shared with other Age Concern staff.

The programme worked with younger people who wanted to become Homesharers and who were attracted to Homeshare in the area because of its close proximity to London and the associated high cost of housing.

Formal Homeshare programmes are known to operate in 9 countries, with over 75 programmes in the United States and several in the United Kingdom. Whilst there have been several models of Homesharing, the basic underlying philosophy is the same – independence, personal growth and improved quality of life through reciprocal sharing of resources (Johnson & McAdam 2000).

Practice example

The first Homeshare International World Congress took place in Paris in July 2009 and was attended by Homeshare practitioners from the USA, Australia, Germany, Portugal, Spain, France, Ireland, Italy and the UK.

Research

There have been few evaluative studies on the costs and benefits of Homeshare, despite long established programmes in three continents.

Jaffe and Howe, writing in the *Journal of Gerontological Social Work* in 1989, identified three types of matches (dependent, transitional and independent).

Other reports have acknowledged the importance of a skilled manager (Montague, 2001) and protocols and matching criteria (Thornton, 1995). Programmes benefit from income from multiple sources of funding (Carstein, 2003) and being integrated into local services (Jaffe, 1989).

An *Economic Evaluation of Homeshare Victoria* (Carstein, 2003) and a review of *Homeshare's impact and Contribution to the Community* in Dallas, Texas, (Shared Housing Centre, 2004), found some evidence of financial savings and health and safety benefits to all involved in the match.

Part Two – The risks and benefits of Homeshare

The issues for Homeshare

Every Homeshare programme must take the issue of risk management seriously and address it effectively, whilst balancing this with the need to consider the potential benefits for Householders and Homesharers.

Risk can be present both for the Householder and the Homesharer.

Homeshare is not a care service but rather a personal arrangement between two people in an ordinary domestic setting. Homeshare is about normal living and normal living inevitably involves some risk. Homeshare teams need the skills to be able to avoid assumptions about a person's vulnerability, to assess their capacity to take informed decisions about risks and benefits and to manage the consequences of those decisions.

A report commissioned by Help the Aged in 2004 looked at the issue of risk within Homeshare and raised some important points, including recognising the difference between "real" risk and "perceived" risk:

"There is clear evidence that older people often see themselves as at risk from criminal violence. In fact they are actually far more likely to injure themselves as a result of a fall in their bathroom or on an uneven pavement on their way to shops".

Risks for the Householder and the Homesharer

The very nature of the Homesharing arrangement means that the Householder needs some form of support or companionship from the Homesharers, sometimes due to isolation or loneliness. They may be frail, have a physical impairment or suffer from confusion or the early signs of dementia, which could affect their mental capacity. The Householder is also the owner/tenant of property containing personal possessions. They may have deteriorating self-care abilities or other social challenges. It is often assumed, therefore, that the Householder is at greater risk within the Homeshare arrangement.

Homesharers may also face risks. Some Householders have believed that because they are providing accommodation, they have a much greater claim on the Homesharer's time and energy than has been agreed or is reasonable. Homesharers may be living away from home for the first time and financially reliant on the Homeshare arrangement.

The assessment and matching process should ensure that participants can identify these risks and make informed choices as a result.

Risks in the property

How the Householder chooses to maintain and clean their property and their personal habits are private and personal and of no concern to anyone when they are not sharing their property.

However, once the Householder invites a Homesharer into their home, these issues do need to be considered, to ensure the Homesharer is living in a safe and comfortable

environment.

The Homeshare Programme Co-ordinator needs to find a balance when addressing the issue of risk within the property. Firstly s/he must remember that Homeshare is an ordinary domestic arrangement and one over which, quite rightly, the co-ordinator has limited control or influence. Secondly s/he must use the Householder interview to determine in a non-judgemental and objective way if the property and Householder are likely to be suitable for a Homesharing arrangement.

Achieving this will involve using a checklist with an objective set of minimum housing and safety standards. The co-ordinator should work openly with the Householder to support them to recognise any potential hazards and plan actions to minimise any risks. In some cases the scheme will need to reject a Householder's application if their property is clearly unsuitable. Where housing is of a very low standard, the Householder may benefit from being informed of the housing support options available locally.

Key point

The level of risk assessment that would be applied a care environment is not normally appropriate to a Homesharing arrangement between two informed adults.

Abuse and Homeshare

Help the Aged define abuse as occurring when one person is harmed or distressed by the action, or lack of action, of another person. It can occur physically, emotionally, financially or sexually and is often hidden or denied by one or both parties. The co-ordinator must be able to devise and implement safeguarding procedures and have good knowledge of current legislation and best practice in helping vulnerable adults to stay safe and identifying and responding to safeguarding concerns. Schemes should ensure that Householders are able to recognise abuse and have opportunities to talk about any issues they have in confidence.

The 2004 Help the Aged report shows that the abuse of older people is often linked to:

- isolation;
- dependence on the abuser or other power imbalances;
- fear of the consequences of complaining;
- the person in the "caring" role is stressed or reluctant to care.

The report concludes that the apparently low incidence of abuse within Homeshare in England (there have been no reported cases of abuse at time of writing) arises from some key features of the Homeshare arrangement including:

- the involvement of the Homeshare Programme Co-ordinator;
- the checking and vetting of Homesharers;
- the implementation of Homeshare procedures;
- the arrangement being built on the concept of mutual benefit.

'No Secrets' provides a national framework for local councils and partner agencies to use in developing local multi-agency codes of practice to prevent and tackle abuse. The www.naaps.org.uk

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guidance encourages councils to publicise their adult protection procedures and to ensure that people are aware of how to seek help when they have concerns.

Local councils participating in Homeshare schemes must take account of 'No Secrets' guidance on joint working between health, social services and other organisations for the protection of vulnerable adults under Section 7 of the Local Authority Services Act 1970. Any new Homeshare programme should follow this guidance.

New Vetting and Barring arrangements are currently (2010) under review. These will have implications for Homeshare. See Section Seven for current arrangements.

Weighing risks against benefits and the risks of alternative approaches

No care and support arrangements are entirely without risks. For instance, many forms of support bring risks of increased dependence for those who use them. Homeshare can introduce the risk of a stranger being present in the Householder's home, but also the potential safety benefits of the Householder no longer living alone. Risks should be recognised, minimised, managed and monitored. The risks that remain once safeguarding procedures have been put in place should be weighed against the potential benefits of Homeshare, compared to the alternatives available to participants.

Establishing that the Householder has the mental capacity to make informed choices about their living arrangements and the Homeshare agreement is vital.

Good practice in safeguarding

Processes and systems which have been shown to be useful include:

- two written references taken for both parties, followed up verbally;
- CRB checks (and in some cases, Vetting and Barring: see Section Seven);
- interview and detailed assessment of both parties;
- a matching process which includes introductory visits and a trial period;
- a written Homeshare agreement between both parties which is not a contract;
- clear information for Homesharers on the Householder's needs;
- ongoing support and contact with both parties;
- ongoing support and involvement from family and friends;
- clear procedures for responding to any complaints or concerns.

Key point

Professionals and documents should avoid jargon such as "risk assessment". Engaging family and friends and encouraging them to participate in monitoring and supporting the ongoing arrangement can be of great benefit.

It is good practice to record concerns which have been considered and any decisions or actions taken. Records should be kept securely in compliance with Data Protection law, and easily understandable and accessible to those about whom personal information is held.

Key point

Records should be proportionate and appropriate to the support of a private arrangement between two informed adults which does not involve personal care. A few Homeshare arrangements form part of a wider care package for the Householder, with clear roles expected of the Homeshare Programme Co-ordinator and/ or participants. Only appropriate tasks should be requested of the Homesharer.

Part Three - Setting up a Homeshare programme

Who can set up a Homeshare programme?

Any individual or organisation can, in theory, set up an effective Homeshare programme to operate independently or as part of a larger organisation. For instance:

- Voluntary or not for profit organisations
- Adults Services Departments
- Primary Care Trusts
- Interested individuals or community innovators
- Housing organisations
- Shared Lives Schemes (formally Adult Placement)
- Service user groups
- Universities or colleges

Practice examples

A Homeshare programme in London is run by an organisation called Crossroads (and previously by Vitalise) which runs a number of care and support services for older and disabled people across London.

Homeshare West, in Bristol, was originally part of a larger venture but now is now run independently.

The Homeshare programme in Oxfordshire, piloted by NAAPS, is now run by the Local Authority. The programme initially matched older Householders with students, but now works with people of all ages and with a variety of support and housing needs.

There are a lot of things to think about before deciding to set up a new Homeshare programme. This chapter looks at:

1. The values underpinning Homeshare
2. The knowledge and skills needed to run a Homeshare programme
3. The scope of the programme and how it will operate
4. How will the programme be funded?
5. Legal considerations

The values underpinning Homeshare

Homeshare's values distinguish it from other models of care, housing and support:

- Homesharing is founded on the belief that people have a right to live in their own home with as much autonomy and independence as is possible.
- Homesharing believes that people involved in a Homesharing arrangement are equal and respected partners rather than "service provider" and "service recipient". Both parties take responsibility for offering something to the other. The interests and rights of both are equally important.

The knowledge and skills needed to run a Homeshare programme

Homeshare Managers and workers can come from any background or employment sector. Skills and knowledge which are needed to make a new programme successful include:

- Understanding of the people who are using the Homeshare programme, including the range of their skills and support needs.
- Marketing Skills, including marketing to younger people.
- Communication skills, including those needed to support people with communication difficulties.
- Knowledge of assessment processes, risk management and the relevant legislation and regulations, including those concerning health and safety, safeguarding and mental capacity.
- Management skills.
- Tenacity.

Some organisations employ a temporary project development specialist before recruiting the permanent team. More information on the knowledge and skills needed by Homeshare staff can be found in Part Five of this Practice Guide.

The scope of the programme and how it will operate

Key areas to consider at an early stage include:

- Which populations, groups and geographical areas will the programme target? What are the predominant cultural and social factors? What are transport links like?
- Who will be eligible to participate in the scheme?
- What is the evidence of unmet local support and housing needs and what outcomes will be measured?
- How will the programme be marketed eg to young people in particular?
- How many matches are expected and what resources will be needed to sustain the programme?
- How will the programme be funded and how sustainable is this funding model? Will the programme charge a fee to the Householder and/or the Homesharer?
- Who will develop and evaluate the policies and procedures and the quality of the service?

Practice example

The Homeshare programme in West Sussex was set up to meet the support needs of older and disabled people as Householders but also has a real housing focus.

The area has very high housing costs and as result it can be difficult to attract keyworkers such as police officers, teachers and health care professionals. The Homeshare programme hoped to offer key workers low cost accommodation and to meet their needs whilst also supporting Householders.

If a new charity or similar organisation is to be set up, there will be many additional factors
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to consider. Quality Assurance schemes such as PQASSO from the Charities Evaluation Service provide a useful overview of the basic requirements of all small organisations.

Homeshare is an established model both in the UK and internationally. Homeshare organisations can network with other UK organisations via NAAPS (www.naaps.org.uk) and internationally via Homeshare International (www.homeshare.org).

Practice example

The Homeshare programme in Atlanta USA is aimed at older people and also those with HIV/AIDS.

The programme is able to get the funding it needs if it works with these groups of people either as Homesharers or Householders. This funding is a major factor in determining the eligibility criteria for participants.

The importance of geography

The experience of existing Homeshare programmes highlights the importance of operating over a clearly defined area, with enough resources to market the service to a wide range of the local services and communities. The most successful programmes operate in areas where housing costs are high or low cost housing is limited. Good transport links can help in attracting Homesharers. Sufficient numbers of people who need support and have houses large enough and of a good enough standard to accommodate a Homesharer are required.

Practice example

There are successful Homeshare programmes in London and also in Melbourne Australia, Madrid Spain and Chicago USA.

All these programmes operate in areas where housing costs are high or housing is in limited supply and this appears to contribute to their success.

Homeshare Placements in Hertfordshire run by Joan Wilkes was particularly successful at recruiting Homesharers because of its good location and transport links into London.

Homeshare programmes operating in rural or less densely populated areas must concentrate much harder on marketing and some have been unsuccessful. Some programmes have targeted particular groups which may increase both the challenges and the potential benefits of the programme. Some programmes just starting in rural areas have identified populations of young people who are stuck at the bottom of council house waiting lists or living in foyer accommodation.

Practice example

A new Homeshare programme was set up in Bunderberg, Australia. Bunderberg is a medium sized town where housing costs are not excessively high and much of the population lives in rural areas.

The programme Co-ordinator identified target groups including homeless people, women escaping domestic violence and people with mental ill health, in addition to the older people usually served by Homeshare.

A great deal of planning has been done in advance of the programme including intensive work with the community to publicise and integrate the programme.

Lesson learned

West Sussex is a large county which is largely rural and with no large urban areas with a high population. The geography and demography of the county has been an ongoing challenge for the Homeshare programme. There is a need to get the balance right between delivering Homeshare over a discrete and therefore manageable geographic area whilst having a large enough population to generate substantial interest in Homeshare.

How will the programme be funded?

Homeshare is a relatively low cost service, but funding needs to be in place to cover:

- The salaries, substantial travel and other costs of one or more Homeshare Programme Co-ordinators.
- Office, administrative, telephone, IT and other running costs.
- The cost of marketing the programme.
- The programme will need effective management, financial planning and governance.

Practice example

A Homeshare programme run by Vitalise employs two Homeshare Programme Co-ordinators who are supported by an administrator and Project Manager. In addition the programme employs a financial expert who works one day a week with the Homeshare team.

The Project Manager believes this arrangement of specialist management and support staff frees up the Homeshare Programme Co-ordinators to undertake their own roles more effectively.

There is more detailed information about possible sources of funding in Part Eight of the Practice Guide.

Legal considerations

Since writing the first edition of the Practice Guide, intensive work has been undertaken to identify the legislative and regulatory issues that need to be taken into account when setting up and operating a Homeshare programme. Areas that have an impact upon Homeshare include:

- Health and Safety legislation including moving and handling, fire safety and food hygiene
- Housing regulations and legislation including Houses of Multiple Occupancy (HMO) rules
- Employment Law
- The regulation of care services through the Health and Social Care Act 2008 and safeguarding requirements
- Mental Capacity law
- Training and learning requirements
- Council tax implications
- TV licence rules
- Tax law
- Impact on welfare benefits and entitlements
- Insurance requirements
- Data protection and confidentiality law

The impact of these laws, regulations and guidelines can vary according to the target groups and operating processes of the scheme. References to legislation in this guide apply to England: legislation and regulations can vary considerably in other nations within the UK. Part Seven of this Practice Guide gives an overview of the legal framework within which Homeshare programmes operate.

Part Four – Community, partnerships and social marketing

Homeshare maintains and strengthens community life

Most of us are part of a number of overlapping networks and communities. People may contribute more or less to a community at different times, but even those who need a lot of support have the potential to contribute to and enhance community life. Homeshare avoids the segregation that can accompany some services as it takes place in ordinary community settings. Homeshare can help people to stay firmly rooted in their community and can bring new people into that community.

Practice example

Mrs Booth is 82 years old and has a Homesharer called Nina with whom she has shared her home for two years. Mrs. Booth has a husband who has dementia and who lives in a nursing home in a nearby town.

Mrs Booth has a large number of friends, family and community links and loves to entertain and keep in touch with people. She no longer has the confidence to drive and has become more isolated. She was finding it difficult to visit her husband which was very distressing for both of them.

As part of the Homeshare arrangement, Nina drives Mrs Booth to visit her husband every day and also helps her to spend time with her friends and to cook and entertain at home.

People can live within a locality and yet never actually feel part of their community. This is particularly true of people who find it difficult to engage in community life and can result in them becoming lonely and isolated. Some Homeshare arrangements aim to tackle this.

Causes of isolation for Householders	Ways in which Homeshare arrangements help
Physical limitations	A Homesharer who undertakes household tasks.
Mental or physical ill health	Support from the Homesharer to get to medical appointments. Someone present if the Householder becomes ill. Reduced isolation.
Loss of confidence	The security of having a Homesharer and the support they can offer.
Transport or mobility problems	A Homesharer who is able to drive or support transport use.

Challenges for Homesharers	Ways in which a Homeshare arrangement could help
Limited awareness of facilities and activities	Advice from the Householder and links with their family and friends.
Limited finances	Rent-free accommodation.
Lack of housing	Long council house waiting lists. Young people living in foyer accommodation.
Lack of confidence	The Householder will have existing community links and friends and family in the area.

Introducing Homeshare into your community

The concept of Homeshare will be new to the community, so it is sensible to begin marketing it and engaging stakeholders ahead of the programme's start. This can be one of the main challenges of developing a successful scheme and requires a great deal of time, energy and imagination.

Practice example

Audrey Heard and Joan Wilkes in their Toolkit "Homesharing Know- How" recommend that Homeshare programmes draw up a formal marketing plan, including:

- Objective of marketing
- Marketing strategy
- Actions to attract Householders
- Actions to attract Homesharers
- General publicity to promote the work of the programme
- Support materials
- Other marketing ideas

Joan and Audrey suggest that the production of a marketing plan can be an effective way to think about how best to begin the work of setting up a Homeshare programme.

Homeshare schemes have used many awareness-raising techniques, including:

- open meetings or meetings targeted at particular groups;
- use of local press, websites, radio and TV;
- adverts and articles in newsletters, publications and websites, such as those read by students seeking accommodation;
- leaflets, flyers and presentations aimed at professionals and community groups;
- stalls at carnivals, fetes, lunch clubs, health events, drop-in centres;
- establishing an online presence for the programme, including a website, Facebook page or blog.

For any new Homeshare programme to be able to attract Householders and Homesharers, awareness is crucial amongst staff in advice centres, health clinics, lunch clubs, community groups, faith groups and places where people meet.

Practice example

Jackie Grossmann works for an organisation called Interfaith Housing Centre of the Northern Suburbs that runs a Homeshare programme in Chicago USA aimed at older people as Householders. She rents a desk in three local day/drop-in centres for older people and spends time at each every month, getting to know the people who provide and use those services.

Many Homeshare programmes are able to form a positive relationship with their local press, TV and radio stations. Many stations have airtime allocated specifically to public service broadcasts. The media are particularly keen on featuring people who have firsthand experience. This can be a powerful way to market and promote Homeshare. It is important to ensure that participants have thought through the privacy and any safeguarding issues involved in talking publicly about their lives and that anyone whose personal information will become public has given informed consent. Participants should be supported during and after media contact.

Practice Examples

Susan Verity from the Wiltshire Homeshare programme used the local press as one way of marketing her Homeshare programme. Articles showed real life examples of successful Homeshare matches in action, in cases where participants were happy to contribute. One article was carried by newspapers across the local area and then picked up the national press, resulting in a great deal of interest in the Homeshare model across the UK.

Wesley Homeshare in Melbourne, Australia were concerned about the cost and short shelf life of professionally produced leaflets and posters. They produced their leaflets and poster on a CD in a format which allowed staff to edit them when changes were needed. They print them in house on a colour printer.

Lessons learned

Dawn Blake from Homeshare West Sussex has recognised that the most valuable marketing tools available to Co-ordinators are stories told directly by participants involved in a positive Homeshare match. Dawn asks participants in advance if they would be willing to get involved in publicity for the programme and the types of activity they consent to eg interviews by a local paper, happy to have their story told by the co-ordinator at a presentation or willing to speak to local groups in person.

Like Dawn, Victoria Harwood from Homeshare Oxfordshire used Gumtree, a website which offers free advertising and is well used by people looking to find accommodation, to advertise for Homesharers. Gumtree advertisements generated a large number of enquiries from potential Homesharers but the vast majority of these were not suitable and a number were timewasters. These co-ordinators have learned that Gumtree and other

similar websites can have value as an advertising tool but can also be time consuming with limited useful outcomes.

Partnerships to market and develop Homeshare programmes

The diverse and flexible nature of Homeshare means that it can be set up to meet either the general or specific needs of a community. To identify the range of people who might benefit in a local community, Homeshare programmes have worked with varied partners. For example:

- Public sector employers such as the NHS, fire, police, education organisations and social services.

In some areas, key public sector workers are unable to afford local housing. Public sector workers are often extensively checked and vetted and have skills and knowledge that help them to work with people and members of the public.

- Care and support services such as care homes, day centres, hostels and domiciliary (home) care.

Staff who work within care services are extensively checked and vetted before taking up employment and may have received training to gain skills and knowledge that help them to care for other people. Care staff are often paid at a very low rate and this can make it difficult for them to find local accommodation. There can be issues with the work patterns of care workers and the potential for conflicts of interest, but these can be managed.

- Universities and colleges and organisations which aim to make further or higher education more affordable and accessible to students from poorer backgrounds.
- Housing bodies and housing services for young people such as foyer organisations.

Practice Example

Joan Wilkes at the Hertfordshire Homeshare programme had positive working links with a local Bible College offering courses of study to students, many of whom came from overseas.

The Homeshare programme provided an excellent opportunity for the students to find rent free accommodation in an area of the UK with very high housing costs. The Bible College valued the arrangement as it enabled them to offer a different accommodation option to their students. Householders valued the time commitment the Homesharers were able to give and the maturity and conscientiousness they brought to their study and home life.

- Voluntary, campaigning and condition-specific organisations such as Help the Aged, Mind, Mencap, RNIB, and Shelter.
- Shared Lives (formerly Adult Placement). Shared Lives provides housing and support

to older and disabled people in the homes of ordinary people who work as Shared Lives Carers.

Shared Lives Schemes employ Co-ordinators who recruit and assess carers, make matches and provide support and monitoring once the arrangement has been made. There are some similarities between Shared Lives and Homeshare, in that both involve supporting a relationship rather than providing a service. There are also some differences, in the location of the arrangement and because Shared Lives involves the provision of personal care, but many of the skills, knowledge and procedures needed by Shared Lives Co-ordinators could be transferable to Homeshare. See www.naaps.org.uk.

- Community Service Volunteers (CSV) is a national organisation that creates opportunities for people to take an active part in their communities with a focus on volunteering and training.

CSV offers some volunteer placement which last several months. These volunteers could benefit from becoming Homesharers.

- Timebank participants earn credits for helping each other. Help is exchanged through a broker who links people up and keeps a record of transactions.

Homeshare programmes could be run as a Timebanking initiative, with the time given by either party “banked” enabling them to gain support and time from elsewhere.

Part Five - Staffing your Homeshare programme

The number and type of staff employed by the programme and the skills and experience that they need will depend on the following:

1. The people who will be using the programme

Homeshare Programme Co-ordinators offer support and advice to the people thinking about or involved in Homeshare matches, their family and friends. They also liaise with other professionals. The process of making and monitoring matches is a core function.

2. The geographic location and spread of the programme

Homeshare Programme Co-ordinators need to develop a working knowledge of the local area and understand the culture and motivations of local people. Staff in rural areas may need to spend a large amount of time travelling.

3. The number of matches the programme is expected to provide and the level of support those matches will require

It takes time to develop and promote a new Homeshare programme before the first match is made.

Homeshare programmes provide differing levels of support and advice to Householders and Homesharers, depending on the needs of their clients, from simply advising participants to contact the programme staff if they have any problems or difficulties, through occasional telephone support, to regular home visits.

Good practice and risk management would seem to indicate all Homeshare participants need regular contact from the Homeshare programme and a person to contact if things begin to go wrong. The target number of matches combined with the level of support given to participants will greatly affect the number of staffing hours required by the programme.

Practice examples

The Wesley Homeshare programme in Melbourne Australia offers Homeshare to older householders who are matched with younger people, many of whom are overseas students. Once matches have been made the programme provides telephone and in-person support from a part time manager, part time co-ordinator and a highly skilled volunteer. There is no administrative support within the programme but management support is provided from the parent organisation. The staffing ratio is based on a maximum of 25 -30 matches to one full time (equivalent) co-ordinator (who is also involved in administration and marketing of the programme).

4. The average duration and turnover of matches

In some Homeshare programmes matches can last for a relatively short time. This can be planned; for example an older Householder who only needs a Homesharer for three

months whilst they recover from an illness; or unplanned; for example, a long term match unexpectedly cut short by a Homesharer getting an overseas job offer.

The duration of matches could also be affected by the people who use the project, for example if a large number of Householders are over 90 years of age, matches may be more likely to end as people become ill, move-into residential support or die. A high level of match breakdown could also be an indicator that something in the programme is not working effectively.

The Homeshare programme run by Vitalise in London offers Homeshare to older and disabled people. Once matches have been made the programme provides training and social opportunities for Homesharers and on-going support to both parties. The programme believes intensive investment in recruitment, matching and monitoring reduces problems and saves time and resources in the longer term. The average match duration has increased to 57 weeks which reduces the time spent re-matching.

Lesson learned

If the breakdown level of matches is very high, the Homeshare Programme Co-ordinator will spend a great deal of time re-matching existing Householders and Homesharers.

Re-matching typically take longer to organise because the Householder and the Homesharer often have more specific requirements once they have experienced the realities of Homeshare

Staffing levels and out of hours cover

In small services, plans will need to be made to cover for staff during annual or sick leave. Sometimes, the Homeshare programme may need to act or advise “out of hours” eg if the Homeshare arrangement unexpectedly breaks down, so an out of hours protocol will be needed.

Lesson learned

Support to the programme “out of hours” or when the co-ordinator is away from work needs to be given serious consideration very early in the life of a new Homeshare programme.

Homeshare is not a care service and is in many ways a personal arrangement between two people. By offering participants the facility to ring or make contact at any time the programme may inadvertently create a level of expectation or even dependency that they cannot (or should not) fulfil.

As part of each match, the programme Co-ordinator should spend time with participants discussing problems that could arise and agreeing the course of action they should take in the event of an emergency, including the need to inform the Homeshare programme after www.naaps.org.uk

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any significant event or “near miss” has taken place.

Practice example

The Homeshare programme run by the Benevolent Society in Sydney, Australia decided to recruit two part-time Homeshare Programme Co-ordinators instead of one person working full time. The belief was that two people could reduce the potential isolation of a person working on their own and make it easy to cope with staff leave and sickness.

Staff skills sets

In addition to the skills for co-ordinators noted in Part Five, workers will need to have the skills to enable them to recognise the strengths and limitations of both parties, to recognise, minimise and manage any risks and to make safe and lasting matches based on this knowledge. Communication and listening skills are crucial to this as are the ability to help vulnerable people to make informed choices within a safeguarding framework.

Practice example

Paula Harman gained an MA in Sociology at university and had excellent communication and people skills. She then went on to work as a secretary and administrator followed by a number of years working as a counsellor for a parenting organisation in Canada.

On returning to the UK, Paula was attracted to an advert for a Homeshare Programme Co-ordinator for a new programme being set up in the area where she lived. Paula found that the criteria for the post did not require a background in care or support work and that her knowledge of sociology and counselling experience combined with an enthusiasm for the role was able to secure her the job as part of a very successful scheme.

Part Six – Matching, monitoring and endings

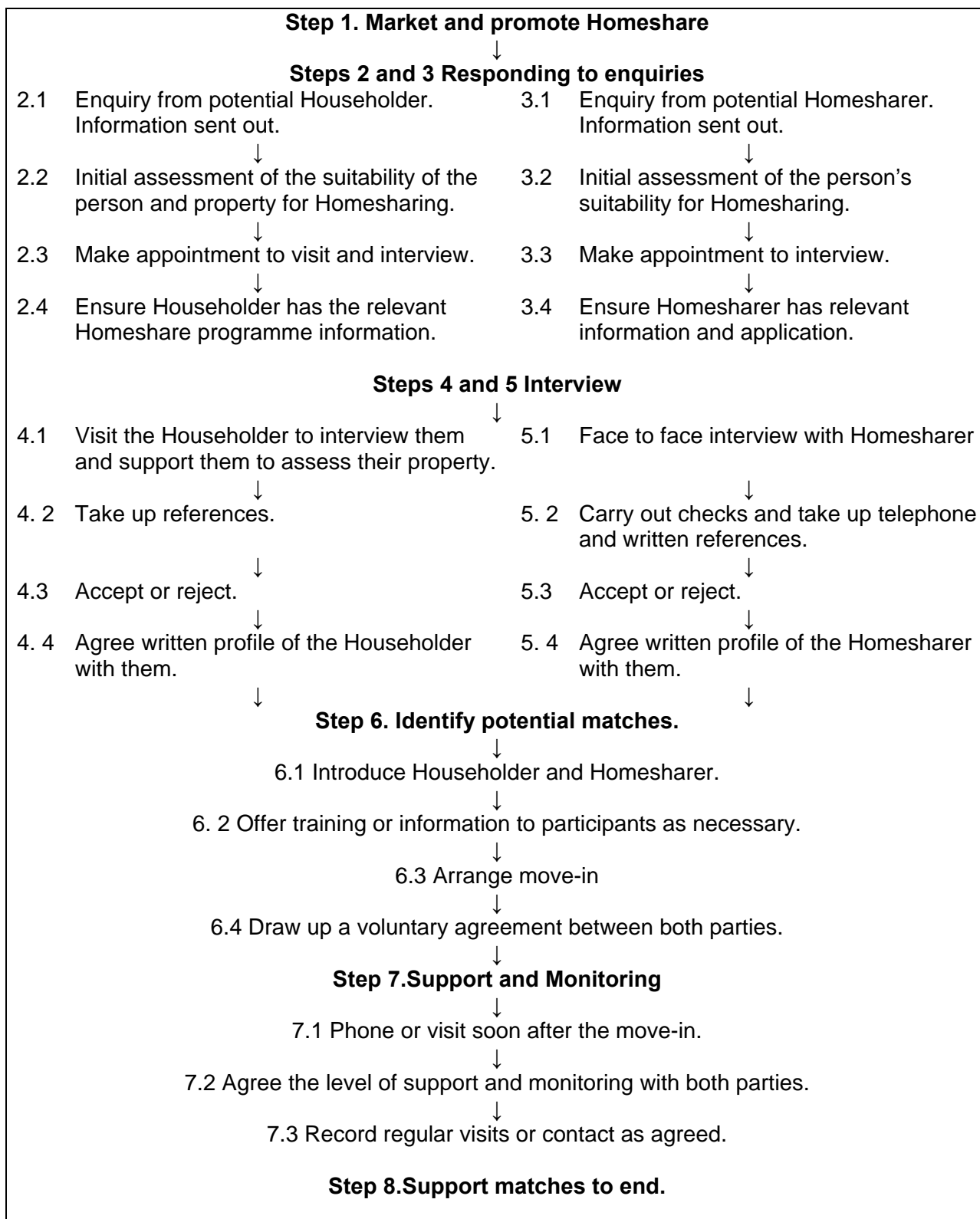
Introduction

Homeshare is called different things in different countries but in all countries it involves a Homeshare Programme Co-ordinator recruiting Householders and Homesharers and then making and supporting matches. Homeshare facilitates support and housing arrangements that are of benefit to both parties and where neither party is in a position of power over the other. It seeks to avoid association with the more formalised worlds of care and housing services.

This Practice Guide is generic and is intended to be useful for any Homeshare programme in the UK working with any service user group. It draws on real examples of current practice taken from programmes worldwide. It is important to understand the local context in order to make a judgement about the practice that you should adopt in your area. For example in the USA many of the programmes involve the Homesharer paying rent and give less emphasis to the support to the Householder than programmes in the UK.

The table overleaf shows the stages in recruiting, matching, monitoring and ending. The first step, Marketing and promote Homeshare, is covered in an earlier chapter.

The key steps to running a successful Homeshare programme



Adapted from a flowchart taken from The Community Care Trust – Homeshare Programme Co-ordinators Manual

Step 2. Responding to enquiries - Householders

2.1 Enquiry from potential Householder

Homeshare programmes should be able to take enquiries through a variety of routes and should consider the service's accessibility to all groups and communities. It is important to record information about participants which is proportionate to the requirements of each stage of participation and in compliance with Data Protection law.

Lesson learned

The two NAAPS Homeshare pilots set up a series of spreadsheets early in the life of the programme and these have proved key management tools for both programmes. Data collected includes:

- Name of each participant
- An ID number for all participants
- Whether they are a Householder or Homesharer
- Enquiry date
- Interview date
- CRB checks and dates for each step of the process
- References and dates for each step of the process
- Additional references (where needed)
- UK eligibility seen
- Income checks undertaken
- Whether they were accepted or rejected onto the programme
- Dates profile sent and agreed
- Date they were added to an additional matching spreadsheet
- Profile exchanges
- Match meetings
- Homeshare Agreement sent and agreed
- Agreement start and end prompt
- Match trial start and finish
- Move-in review date and visit
- Other review/support dates
- Number of matches each applicant had had

In addition to the main spreadsheet both programmes have:

1. A match spreadsheet which is used to record possible match partner. This is to help the co-ordinator consider all potential match possibilities and is particularly useful where there are more participants to be considered than can easily be remembered by the co-ordinator.
2. An archive spreadsheet for participants who have applied to join the programme and who have since ended their Homeshare application
3. An enquiry spreadsheet for enquirers which records their name, date, how they heard about Homeshare and contact details. This information is recorded so

that the number of enquirers and how many go through to join the programme can be tracked.

2.2 Initial assessment of the suitability of the person and property for Homesharing.

Most Homeshare programmes have a set of questions to help prospective Householders to decide if Homeshare is right for them and to assess whether the individual will be able and suitable to participate.

Some people who enquire lack the necessary space, or can even be pressurised into Homeshare by family, friends or care professionals.

Key point

Homeshare programmes have limited resources. Early assessment processes need to be designed to pick up areas where support will be needed, but also to rule out those who are unlikely ever to be matched with a Homesharer, even if larger amounts of support were to be offered.

The Homeshare arrangement involves matching two people with compatible personalities and lifestyles to live together, so what one person might find totally unacceptable could suit another completely.

At this stage the co-ordinator needs to get the difficult balance between weeding out totally unsuitable candidates whilst not rejecting people for whom a perfect (if quirky!) match might exist.

The impression gained by potential applicants may heavily influence their decision to continue or withdraw their application, so the training, skills, knowledge and approach of staff is important, particularly as applicants may be vulnerable. Where an enquirer is felt to need much more support than Homeshare alone can offer, staff should have the local knowledge to be able to refer them to more appropriate services.

2.3 Make appointment to visit and interview

Once the initial enquiry process has determined that the person could be suitable for Homeshare an appointment should be made to visit the person in their home to undertake an assessment interview. It may be advisable to split the interview into more than one session and to work with the potential Householder to identify family, friends or professionals who could support them through the process. The Householder would need to give written permission that their personal information can be shared with named individuals for this to happen in compliance with data protection law.

2.4 Ensure Householder has the relevant Homeshare programme information.

Information packs usually include:

- Details of the basic Homeshare model and what it aims to achieve.

- Detail of the local Homeshare programme – who it serves and how it operates.
- A basic outline of the steps the Householder will have to work through in order to make a Homeshare match including estimated timescales.
- Contact details for the programme and an introduction to the programme Co-ordinator.
- Copies of newsletters or articles about the programme showing “real life” Homeshare success stories.

Step 3. Responding to enquiries - Homesharers

3.1 Enquiry from potential Homesharer

As with Householders, potential Homesharers may find out about Homeshare through various channels.

Practice example

The Wesley Homeshare programme in Melbourne, Australia markets the programme to potential Homesharers on the internet. It receives the majority of its enquiries from Homesharers by email. They are able to send out the information pack to Homesharers electronically and also receive and process Homesharer applications in same way, saving time and resources and making Homeshare more accessible to younger people.

Some Homesharers are looking for accommodation and may have a target date or time limitations within which they must find somewhere to live. The Homeshare assessment and planning processes should ensure a prompt and effective response.

3.2 Initial assessment of the person’s suitability for Homesharing

Homeshare programmes often follow up a first enquiry from potential Homesharers with a more detailed telephone interview following a set of questions. They may contact the Homeshare programme with a very limited idea as to what it entails. They may be attracted by the opportunity to live in rent free accommodation and may not have given much thought to the support they will be asked to offer the Householder.

The purpose of the telephone interview is:

For the applicant

- To learn more about Homesharing.
- To evaluate Homesharing against their other housing options.
- To decide if they wish to proceed with their application.

For the Homeshare Programme Co-ordinator

- To assess if the person is potentially suitable.
- To make an initial assessment of their motivation and attitude.
- To decide whether to proceed with a face-to-face interview or to decline to proceed, giving clear reasons for this decision.

Reasons for unsuitability at this early stage could include that the applicant:

- wants to live outside the catchment area;
- has an urgent need for a match which is not compatible with the Homeshare assessment and matching processes;
- has a large amount of furniture and possessions that they wish to take with them;
- has a pet which would be difficult for most Householders to accommodate;
- has unrealistic expectations of Homeshare such as a very short-term match;
- has unsuitable work, personal or study commitments which mean they would be frequently away overnight,;
- does not express a genuine interest and commitment to supporting a Householder and seems more committed to meeting their own needs;
- refuses to undergo the set assessment procedures;
- does not speak the language of the programme and local Householders well enough to go through the process and have a successful match.

Lessons learned

The Homeshare programmes in West Sussex and Oxfordshire received a large number of enquiries from potential Homesharers who had limited commitment to the programme and rarely went on to make a match. These potential Homesharers took up a great deal of the time and energy. The scheme began to take up references on Homesharers once the telephone interview had established they were broadly suitable and found this to be effective in weeding out those that were not genuinely interested in Homeshare.

3.3 Make appointment to interview

After a successful telephone interview, an assessment interview is often arranged to take place in the Homeshare programme Office.

Practice Example

Rita Zadoff runs two large Homeshare programmes in Atlanta USA. One programme is aimed at older people and the other works with people who are HIV positive or have AIDS.

Atlanta is a large city and the programme has three offices in the Metro Atlanta area. One office is in the City of Atlanta and two offices are in the suburbs in different counties. Rita interviews potential Homesharers at the office. She feels that the challenge of travelling to the office, finding the right location and making the interview on time is all a good test of a potential Homesharer's commitment to the programme and assessment process.

3.4 Ensure Homesharer has relevant information and application

Homesharers are sent a letter or email confirming the date of the interview and detailing any documents the Homesharer needs to bring on the day. This letter is usually accompanied by an information pack and application form. Information packs can include:

- The basic Homeshare model and its aims.
- Detail of the local Homeshare programme – who it serves and how it operates.
- A basic outline of the steps the Homesharer will have to work through before a match is made including estimated timescales.
- Contact details for the programme and information about the Co-ordinator.
- Copies of newsletters or articles about the programme showing “real life” Homeshare success stories.

Lessons learned

It can be helpful to send out some Homeshare programme information at the point of initial enquiry. However more detailed information may be off-putting or daunting particularly to older Householders or Homesharers whose first language is not English, so some programmes choose to send only basic information and retain more detailed information to be given in person during the interview.

The application form usually covers:

- personal contact details
- next of kin
- occupation
- training/qualifications
- attraction to Homeshare
- hobbies and interests
- current living arrangements
- agreement to follow Homeshare policies and undergo CRB check
- reference contact details

Some schemes ask Homesharers to complete the form and post it to the co-ordinator before the personal interview, giving the co-ordinator a chance to plan questions. Some complete the form as part of the interview process.

Step 4. Interview – Householder

4.1 Visit the Householder to interview them and support them to assess their property

The main objective of the personal interview is to gain a comprehensive understanding of the Householder’s needs and requirements, to determine whether these can be met by a Homeshare match and for the Householder to gain a clearer picture of what an arrangement might entail. The interview of the Householder should take place at their home, giving an opportunity to view the accommodation that will be offered to a Homesharer. Refer to Part Two of the Homeshare Practice Guide for more information about the issues of risk and the property.

The Homeshare Programme Co-ordinator and Householder will need to discuss the service’s boundaries and how personal information will be used, stored and shared. They may agree it would be helpful to involve family or professionals.

Practice Example

Joan Wilkes at the Homeshare programme in Hertfordshire worked mainly with older people, some of whom were in the early stages of dementia.

If the Householder and/or Joan felt it would be useful she helped them to identify a family member, friend or professional who could provide support through the personal interview and other Homeshare processes.

Householders may be reticent or embarrassed about stating their needs. Others may be unclear or unrealistic about what Homeshare should/could provide and expect a Homesharer to act as a “live in” carer or housekeeper. In preparing for the interview, the co-ordinator should ensure that:

- The Householder understands the purpose and process of the interview.
- They have any support they need from family, friends or professionals.
- The co-ordinator is aware of any barriers to communication and has taken steps to minimise these eg through the use of an interpreter.
- The duration of the interview(s) have been planned to take into account the Householder’s health, attention span, lifestyle.
- The co-ordinator feels comfortable exploring any difficulties that the Householder may have in recognising and accepting their support needs.
- Confidentiality is respected.

The co-ordinator will need to make a judgement as to the mental capacity of the Householder. This will require training. See Mental Capacity Act notes in Section Seven.

The interview form and schedule

The personal Householder interview usually covers the following information about the Householder:

Personal background

- Birth place
- Family history
- Languages spoken
- Schooling
- Work
- Significant relationships, marriages or partnerships
- Children
- Current personal and family situation
- Hobbies or interests

Expectations of Homesharing and needs in relation to

- Cooking
- Housework
- Shopping
- Laundry
- Support or presence at night
- Evening or weekend presence
- Companionship
- Personal help or prompts
- Outings
- Driving or transport
- Home maintenance
- Gardening
- Care of pets
- Security

Preferences for Homesharer characteristics in relation to:

- Age
- Individual or couple
- Smoking
- Gender
- Marital or partnership status
- Cultural or religious background
- With or without pets
- Type or personal characteristics of person

Personal and preferred habits

- Getting up, going to bed and sleeping habits
- Bathing and personal care routine
- Work schedule (if relevant)
- Meals, type of food and mealtimes
- TV and music
- Regular arrangements and social activities

Aspects of the home and shared living

- Previous experience of shared living arrangements
- Length of residence and tenure in current home
- Type of neighbourhood and community
- Shared and separate space
- Tidiness
- Guests
- Telephone and internet use and associated costs

- Homesharer's room; size, furniture, cleanliness, heating, privacy
- Use of shared spaces including bathroom, toilet, laundry, kitchen, garden.

Householder's health and wellbeing

- Long and short term illness and time spent in hospital
- Mobility
- Medication
- Visual ability
- Hearing ability
- Equipment or adaptations used
- Doctor, social worker etc contact details

Householder's support networks

- Significant people
- Contact with other people duration and regularity
- Emergency contacts
- Other support received including home or domestic help
- Services received eg day centre, meals on wheels

Finances

- Support received with financial issues and from whom
- Household and other relevant insurance
- Views on shared cost of utilities.

Assessments should be structured to avoid giving the impression that the Householder is being interrogated and to enable sensitivity in approaching personal issues. For instance, a question such as "Tell me about your family" will not only yield information about the Householder's parents or children, but can also allow the co-ordinator to assess how well the Householder can remember or retain details about their loved ones whilst exploring more subtle issues such as loneliness or social isolation. These more personal and often hidden aspects of the Householder's life and personality can be just as important as the factual information in assessing the needs and suitability of a Householder for the Homeshare programme.

Key point

Each Homeshare programme should take time to reflect on the issue of prejudice and discrimination and draw up a code of practice. The code should take into account the realities faced when working with ordinary people as Householders and Homesharers.

The Homeshare programme run by Interfaith in Chicago USA takes the bold step of matching people who are very different in order to challenge prejudice directly and change views through positive relationships and experiences.

In extreme cases it may be necessary for programmes to reject a potential participant if it is felt their views are unacceptable and unlikely to change.

Questions about the home should establish whether the Householder has the right to invite someone else to live there without involving or consulting someone else such as the owner of the property. Asking questions about the Householder's existing support networks enables the Homeshare Programme Co-ordinator to establish how the Homesharer will fit into and complement those networks.

Practice Example

The Homeshare programme run by the Community Care Trust in London devised a Household interview form which aims to use everyday language. For instance it asks "Can you hear alright on the telephone?" rather than "Do you have a hearing impairment?". This enables people to share personal information without feeling they are being assessed for "care".

Key point

Recording the interview is essential but it is important not to let the means of recording get in the way of establishing the relationship. The focus must always remain on the person.

At the end of the interview the Homeshare Programme Co-ordinator should first summarise what has been agreed to ensure nothing has been misunderstood. For example "Have I got this right; you would like me to look for a man aged 25 – 30 who is a non smoker and has an interest in football or cricket?"

The co-ordinator should then outline the next steps in the process including; meeting potential Homesharers, negotiating the agreement and the role of the Homeshare programme in setting up and supporting any match.

At the end of the interview it would be usual for the Homeshare Programme Co-ordinator to give the Householder a copy of the Homeshare Agreement in order to ensure that they are aware of the informal arrangement involved and the expectations if they chose to proceed.

4.2 Take up references

It is not always common practice within Homeshare to take up references on potential Householders, as they are often seen as being the more vulnerable party.

However, it is good practice to take up two written and verbal references from people who know the Householder well, have no vested interest in the Homeshare arrangement and who are not family members.

The Homeshare Project Steering Group has devoted time to consideration of the checks that should be made on Householders and Homesharers and in particular whether Criminal Records Bureau (CRB) checks should be made on both parties.

The Steering Group recognised that CRB checks are just one of a range of checks that a Homeshare programme can make on the background of Homeshare participants. The Householder was seen as generally the more vulnerable party in a Homeshare arrangement. The Steering Group concluded that, even if it were legally possible, CRB checks on Householders were of questionable benefit and could place a barrier to people participating in the programme. Some Homesharers may come to Homeshare through an agency or organisation that requires extra checks on Householders eg the police or local Foyer. In these cases the potential Householder may be asked by the Homeshare Programme Co-ordinator to have a CRB check voluntarily. This check can only be undertaken by the referral organisation, so agreement is needed that information will be shared with the Homeshare organisation, which should have a written policy on acting on that information.

Lessons learned

Homeshare Programme Co-ordinators in West Sussex and Oxfordshire found they were spending a great deal of time following up and chasing referees who failed to respond promptly to a reference request. Householders and Homesharers were informed at an early stage in the application process that supply references was their responsibility and that the co-ordinator could not proceed with the application until references had been received.

4.3 Accept or reject

After the personal Interview the Homeshare Programme Co-ordinator should decide whether they feel the Householder and their home are suitable for Homeshare.

If they decide to accept the Householder they should go through with them again the next steps in the process including timescales. If they feel they need to reject the Householder they should do so with sensitivity and for reasons that are clear, objective and defensible. Reasons for rejecting a potential Householder might include:

- accommodation not acceptable;
- concerns raised as a result of references;
- Householder unrealistic in their expectations;
- Householder has needs that are too great to be met by Homeshare;
- Householder not feeling positive about Homeshare and may have been

- pressured to apply by family or professionals;
- Householder's attitude, personality or routines would be difficult for others to live with.

The decision along with any other actions, such as referring to another agency, should be recorded and shared with the Householder.

4. 4 Agree written profile of the Householder with them

Once the interview is complete and a decision made that the Householder will join the programme, many Homeshare programmes write a profile or pen picture of the Householder. The profile should identify the Householder's through initials only and should not include their address or any personal or unnecessary information. It should be agreed with the Householder and/or their representative. Headings might include:

- Personal background
- Personality and interests
- Needs
- Preferences
- Current support
- Medical
- Accommodation
- Conclusion

Lessons learned

Homeshare Programme Co-ordinators in West Sussex and Oxfordshire found that if they asked participants to write their own profile the results were often excellent and provided more useful information than if the profile had been written by the co-ordinator.

The profile can be used to "introduce" the Householder to potential Homesharers before an initial meeting.

Step 5. Interview - Homesharer

5.1 Face to face interview with Homesharer

Interviews may take place on a one-to-one basis or involve colleagues in order to gain a different perspective and opinion.

Homesharers may be unsure about the expectations and boundaries of Homeshare. The main objective of the Homesharer personal interview is to gain a comprehensive picture of the Homesharer's housing needs, establish what they will be able to do for a Householder and to assess their suitability for a Homeshare match. In preparing for an interview, the co-ordinator should ensure that:

- The Homesharer understands the purpose and process of the interview.
- The co-ordinator is aware of any barriers to communication and has taken steps to minimise these eg through the use of an interpreter.
- Confidentiality is respected.

The Homesharer personal interview should usually cover very similar issues to that covered in the interview of the Householder and should build on information already gained through the telephone interview and application form. It should include:

Personal background

- Birth place
- Family history
- Languages spoken
- Schooling
- Work
- Significant relationships, marriage or partnerships
- Children
- Current personal and family situation
- Hobbies or interests
- Experience relevant to Homesharing

Expectations of homesharing what help the person can offer in relation to:

- Cooking
- Housework
- Shopping
- Laundry
- Support or presence at night
- Evening or weekend presence
- Companionship
- Personal help or prompts
- Outings
- Driving or transport
- Home maintenance
- Gardening
- Care of pets
- Security

Preferences for Householder characteristics in relation to

- Individual or couple
- Age
- Smoking
- Gender
- Cultural or religious background
- With or without pets
- Type of person

Personal and preferred habits

- Getting up, going to bed and sleeping habits
- Bathing and personal care routine
- Work or study schedule
- Meals, type of food and mealtimes
- TV and music
- Regular engagements and social activities
- Commitments
- Holidays

Aspects of the home and shared living

- Previous experience of shared living arrangements
- Tidiness and cleanliness
- Guests
- Telephone and internet use, and associated costs
- Furniture and belongings

Health and wellbeing

- Long and short term illness
- Medication
- Disability
- Equipment or adaptations used

Support networks

- Significant people
- Contact with other people duration and regularity
- Emergency contacts

Finances

- Money worries
- Relevant insurance
- Views on shared cost of utilities

Lesson learned

Dawn Blake at Homeshare West Sussex and Victoria Harwood from Homeshare Oxfordshire have received applications from Homesharers who have children (under the age of 18) who they want to involve in a Homeshare match. There are a number of potential issues to consider which include:

- The Householder will need to free up more than one bedroom without an increase in the number of hours of support they will receive.
- Children could have too much of an impact on the life of the Householder and they could feel that their home has been “taken over”.
- Children could have their lives and freedoms curtailed as they have to live alongside a Householder.
- Lack of security of tenure for children and the potential for disruption to their lives and schooling if the arrangement comes to an unplanned end.
- There is potential for a parent to use Homeshare to move up the local housing register by entering into a Homeshare arrangement, then acting in a way as to be asked to leave so as to make themselves and their family homeless.
- The risk to the children posed by the Householder whose history is largely unknown and who is not CRB checked.
- The risk that the Householder could be placed in a position of responsibility as “sitter” for the child.
- The parent could face a personal conflict if their responsibilities as Homesharer ever came into conflict with their responsibilities as a parent.

For all of these reasons some Homeshare programmes took the decision not to accept Homesharers who live with their children unless the Householder is offering totally self-contained accommodation. In this instance, the Homeshare agreement will make it clear that the Homesharer must take full responsibility for their children at all times.

The interview is an opportunity for the co-ordinator to gauge the Homesharer's:

- Emotional maturity and stability
- Good mental and physical health
- Availability and commitment
- Life or work experience that might make Homesharing easier
- Lifestyle factors that might make Homesharing difficult eg irregular working or social hours or personal commitments.
- Good reasons and motivations for Homesharing
- Realistic expectations of Homesharing

On occasions applicants may be living overseas and the Homeshare Programme Co-ordinator may not be able to meet them face-to-face until their arrival in the UK. In this instance the Homeshare Programme Co-ordinator should undertake the telephone interview and request a photograph and written application. It is important to make sure the applicant is aware that a match cannot be made without a face-to-face interview when they arrive in the country plus a CRB or equivalent check from the country they are moving from. Co-ordinators should research the reliability and scope of checks in other nations – see Key Point below.

Lessons learned

The Homeshare programmes in West Sussex and Oxfordshire have a number of Homesharer applicants from overseas. They have developed clear guidance to follow when processing these applications to ensure that they are not contravening UK immigration legislation.

5.2 Carry out checks and take up telephone and written references

Homesharers must agree to allow the programme to take up references and carry out an enhanced CRB check (where this is lawful [see Section Seven]). As a minimum, two references should be gained in writing and that these should be followed up by speaking to the referees on the phone or in person. Following up references in person will help to ensure that:

- Relationships between the applicant and the referee can be explored and verified.
- Written statements can be questioned and expanded upon.
- Referees are free to give information verbally that they may be reluctant to put into writing.

Key point

The Homeshare Programme Co-ordinator may get a fuller verbal response from a referee when they are able to explain Homesharing and discuss what sort of personal qualities are important to the success of a Homesharing arrangement.

Some Homeshare programmes require three references. All agree that referees should not be family members and, in some schemes' guidelines, should not be close friends.

The Homeshare Programme Co-ordinator should send out a reference request letter to the referees detailed on the Homesharer's application form together with information about Homesharing and a reference form for the referee to complete and return. It can take some time to gain an enhanced CRB check, so it is sensible to consider its timing.

Key point

At time of writing, new Vetting and Barring arrangements brought in in October 2009 and administered by the Independent Safeguarding Authority (ISA) remain in place whilst further planned measures (such as the requirement for providers of regulated activities to register with ISA) are being reviewed by the current (July 2010) government. See Section 7 for details on vetting and barring. Visit www.isa.gov.org.uk for current developments.

It is now a criminal offence for barred individuals to work or apply to work with children or vulnerable adults in a wide range of posts. Employers also face criminal sanctions for

knowingly employing a barred individual across a wide range of work. In certain circumstances, employers, local authorities, education and library boards, health and social care bodies and professional regulators have a legal duty to refer to the ISA information about individuals who they believe have harmed or may pose a risk of harm to children or vulnerable adults. See Section Seven for important details.

CRB checks may reveal convictions that have not led to them appearing on a barred list, but that may nevertheless affect the Homeshare Programme Co-ordinator's decision to accept the Homesharer onto the programme. There is a general consensus about those criminal acts that would make a person an unacceptable risk to vulnerable people including those that involve violence, fraud, theft or sexual misconduct. However with these and all other types of criminal offence the co-ordinator may need to make a judgement about the risk implication. One key factor will be whether the potential Homesharer has already disclosed the offence. Where they have not disclosed the offence the co-ordinator will need to judge whether this was a deliberate withholding of information and what this implies about the honesty of the person.

The person's age when they committed the act, how long ago it happened and whether it was a one-off incident or an event in a history of criminal activity are also important to consider when making decisions based on this risk. For example, a one-off conviction for speeding or being drunk and disorderly as a youth might be considered to have little impact on the character of a person now or be a risk to vulnerable people.

Practice Example

An applicant to Wesley Homeshare had a police check returned with a number of offences relating to disorderly conduct and verbal abuse. This naturally caused concern as it was indicative of difficulties in managing anger and personal behaviour. The applicant could not be considered as a suitable person to share the home of an older person.

Another applicant disclosed a minor offence that had occurred some years earlier under extreme personal circumstances that did not involve violence or harm to another. She was worried that this would preclude her participation in Homeshare. Open discussion of this meant the applicant was not excluded from the programme.

It is essential to have a policy covering the use of evidence from CRB checks and which offences pose an unacceptable risk. This should be shared with applicants before their CRB check is requested. This policy could include the identification of a suitable person within the local authority to offer advice on difficult CRB issues.

Key point

"The CRB can only access criminal records (convictions, cautions, reprimands and warnings) held on the Police National Computer (PNC) in England, Wales and those recorded from Scotland. There is also some Northern Ireland conviction data held on PNC.

If an organisation recruits people from overseas and wishes to check their overseas criminal record, a CRB disclosure may not provide a complete picture of their criminal record that may or may not exist. To help organisations access this information the CRB

has set up a dedicated advice service”

Taken from the CRB website advice on recruiting people from overseas.

5.3 Accept or reject

Making decisions about whether Homesharers should be accepted can be more complex than assessing the suitability of Householders and can rely heavily on the professional judgment and skills of the Homeshare Programme Co-ordinator. In order to make these decisions more objective and fair every Homeshare programme should have agreed eligibility criteria against which they can assess the suitability of Homesharers.

Experience of established Homeshare programmes indicates that a higher proportion of Homesharers as compared to Householder applicants will drop out before a full assessment has been completed. This can be because potential Homesharers often have an urgent need for accommodation or because people realise that Homesharing is not for them once they have learned more about it.

Practice Example

In order for a Homesharer to be eligible to join the Homeshare programme they must:

1. Be at least 18 years of age;
2. Be prepared to live in the geographic area covered by the programme;
3. Be willing and able to undertake a Homesharing arrangement for at least six months;
4. Be willing to undergo the assessment and matching process, including the provision of two personal references and a CRB check;
5. Have a genuine interest in the lives and experiences of the type of people served by the Homeshare programme and preferably have some experience of living with/supporting an adult with care and support needs;
6. Have the capacity to share another person's home, including
 - the ability to communicate effectively;
 - being a mature and sociable person with an emotionally stable and resourceful approach to life;
7. Have the capacity, ability, lifestyle and commitment to provide consistently a stipulated amount of assistance and companionship to the Householder;
8. Wish to bring only such possessions and furniture as would reasonably fit into the home of a Householder or be willing to put items into storage;
9. Have a commitment to the underlying values and principles of Homesharing;
10. Have a knowledge and understanding of written and spoken English sufficient for the individual to engage fully in the assessment and matching process.

Once a decision has been made as to whether the Homesharer will be accepted by the programme, the Homeshare Programme Co-ordinator should inform them about the next steps in the process including timescales. If they feel they need to reject the Homesharer they should do so with sensitivity and tact, stating clear reasons based on firm evidence that can be justified if it is challenged. The decision and the reasons and evidence for it should be carefully recorded.

5.4 Agree written profile of the Homesharer with them.

Once the interview is complete and a decision made that the Homesharer will join the programme, many Homeshare programmes produce a profile or pen picture of the Homesharer. This may be drafted by the Homesharer themselves.

The profile should be agreed with the Homesharer, use initials rather than their name and avoid including any personal or unnecessary information. It may include:

- personal background;
- personality and interests;
- experience relevant to Homesharing;
- motivation;
- summary.

Step 6. Identify potential matches

Once the Homeshare Programme Co-ordinator has accepted Householders and Homesharers into the programme they can begin to consider possible matches. This process is crucial.

Practice examples

A Homeshare programme run by Vitalise has attempted to increase the average duration of Homeshare matches by:

- Reviewing and updating all information regularly, including the needs of the Householder and the Homeshare Agreement.
- Changing the way Homesharers see their role and upgrading the quality of support for them, to ensure that Homesharers feel valued by the charity. This means Homeshare Programme Co-ordinators are more likely to hear from Homesharers at an earlier stage when there are problems or concerns.
- Helping the Homeshare staff team to adapt to a wider 'care and support' role, with the Homeshare match the centre of but not the sole 'service' provided by Vitalise.
- Increasing contact with wider family members where possible.

However, in practice, both Householders and Homesharers may be looking to match up quite quickly. Therefore, the Homeshare Programme Co-ordinator has the responsibility of getting a good balance between making matches quickly and ensuring that matches are suitable.

Key point

Extract taken from publication "Homesharing Matching for Independence" published by the Council for Jewish Elderly, Chicago USA.

... "Whilst quick matches may succeed, staff may spend more time in case management than would have been necessary if they took more time to assure an appropriate match. In the end, taking additional time to find compatible matches saves time and energy for everyone involved. Highly satisfied participants will serve as the program's best marketers."

Homeshare programmes tackle the matching process in many different ways including:

- computer programmes that analyse people's differences and similarities and flag up people who appear on paper to be compatible;
- a team approach to matching to give varied perspectives and opinions;
- visual matching tools including cardex systems, white boards and wall charts.

Practice example

The Wesley Homeshare programme in Melbourne, Australia, employs two part time staff and has the support of a skilled and committed volunteer who also works part time.

As Householders and Homesharers are accepted onto the programme, their initials and brief details are noted onto two different white boards in the team office.

Once a week the team hold a matching meeting where they look at the boards and discuss possible matches. The Homeshare staff believe this approach gives them lots of different ideas and perspectives and sometimes identifies (or avoids) matches that might not have been made by a co-ordinator working on their own. They also believe this approach gives shared accountability for matches and enables all members of the team to know about the people involved in all matches supported by the programme.

Practice example

In Barcelona the Caixa Catalunya's community project Fundacio i Viure Conviure runs a Homeshare programme for university students and older people in the community.

A psychologist is involved in interviewing all students who apply. A social worker interviews all the older people who apply.

Once new Householders and Homesharers have been accepted onto the programme the psychologist and the social worker then meet and jointly agree and organise potential matches.

Many Homeshare programmes have matching checklists or prompt sheets that help co-ordinators think through the issues before deciding that a match might be possible.

Practice example

Adapted from manuals produced by Community Care Trust and Wesley Homeshare (amended in order to fit UK requirements):

- Can people understand each other? – are there any communication barriers posed by accent or language
- Is there too big a cultural or lifestyle difference?
- Does the Homesharer come in late and the Householder likes to stay awake to make sure everyone is in?

- Are there enough common or compatible interests?
- Do manners and social customs match?
- If cooking is required will the type of food the Homesharer can cook be accepted and appreciated by the Householder?
- Will either party's religious beliefs have a negative impact on the living arrangements or relationship?
- Would one party dominate the other?
- Will the Homesharer be able to get on well with other people involved in the life of the Householder eg family and friends of the Householder or involved professionals?
- Does the Homesharer have commitments that might take them out at times when the Householder would prefer them at home?
- Do the hours required match the hours available?
- Are there any major incompatibles such as politics or pets?
- Does the accommodation meet the Homesharer's needs?
- Is the property in the right location and with the right transport links for the Homesharer to get to work/study, worship, pursue interests, maintain friendships and relationships etc

Once a potential match has been identified the Homeshare Programme Co-ordinator should exchange the profiles of the two people involved. Some programmes send written profiles to participants and follow this up with a phone discussion with both parties.

Lesson learned

Dawn Blake from Homeshare West Sussex has had a large number of potential matches turned down by Householder or Homesharer at the 'profile exchange' stage of the process. So she has started to take the profiles of potential match partners to participants to share the information in person. This is a time consuming approach but one that Dawn believes is more effective in securing matches, as she can add to the written information and explore any preconceptions or concerns.

6.1 Introduce Householder and Homesharer

If a match looks feasible, the Homeshare programme will send a letter to each party detailing the time, date and place of an introductory meeting, which should take place at the Householder's home wherever possible and will be supported by the co-ordinator.

During the introductory meeting, the co-ordinator should support the Householder to outline what tasks and duties they would like the Homesharer to undertake and should help both parties to explore what living together would be like. It can be useful for the Householder to show the Homesharer around their home and outline who will use what space. The Co-ordinator should encourage both parties to contribute questions and share information and should also observe interactions closely and make a judgement about how a Homeshare arrangement might work.

Some Homeshare programmes have a list of items and questions for both parties to think about. In some programmes, these are sent to both participants ahead of the meeting. Communication and hearing challenges should be considered and planned for

beforehand.

The meeting is an opportunity to:

- stress the importance of good communication;
- encourage people to ask each other questions based on the profiles;
- encourage both parties to share their expectations of homeshare and what they hope to gain from the arrangement;
- explore what time off arrangements would work for both parties;
- define any house rules or restrictions e.g. smoking, pets;
- uncover and address any early concerns;
- explain the ongoing role of the co-ordinator;
- discuss a possible move-in date.

Practice example

The Wesley Homeshare Manual and others make a number of suggestions for topics to be covered in introductory meetings, such as:

- Reasons for trying Homeshare.
- Areas of the home that are private and those to be shared.
- What items in the home are shared - kitchen equipment, laundry, linen/towels, TV, sound systems and others.
- Sharing food, purchase and cook food separately, or a bit of both?
- Housework, cleaning: who does the cleaning, when, how often?
- Car parking.
- Payment of utilities – gas, electricity, water.
- Temperature of the house – heater/cooler in own room.
- Telephones.
- Any specific restrictions or special ‘house rules’ eg no smoking.
- Assistance to be provided by the Homesharer for example:
 - Odd jobs, tasks and errands;
 - Preparing, cooking and sharing meals;
 - Garden maintenance;
 - Caring for pets eg evening walk for the dog;
 - Drive to the shops, church;
 - Provide companionship;
 - Check the security of the house and appliances before going to bed;
- Personal habits and routines:
 - Daily schedule: waking, bedtime, work timetable, meal times;
 - Television use;
 - Music preferences;
 - Companionship and time alone/privacy;
 - Social commitments, weekend activities;
 - Guests (overnight, family, friends);
 - Pets.

It should be clear to both parties that this early meeting involves no commitment and is simply an opportunity for both to explore their compatibility. Some Householders may wish for a family member, friend or professional to be present.

Participants should be given a day or so to digest the meeting before being asked for a decision. It may be necessary to arrange a second or even third meeting in order to help people decide if they would like to proceed.

6.2 Offer training or information to participants as necessary

At any time during the assessment, matching process or as the match progresses, the co-ordinator may become aware of gaps in the knowledge, skills or understanding of the Homesharer or more rarely in those of the Householder. The Homesharer also need to know how to respond to changing needs, problems and emergencies. These learning needs will need to be addressed, though not necessarily through formal training courses.

Key point

Homesharers can be motivated to enter a Homesharing arrangement for many different reasons and this may affect their view of training and development. For example, a young person who is studying to become a nurse may see Homeshare as one way to expand their knowledge of the needs of older or disabled people. They might welcome any training or development opportunities made available to them through Homeshare and see these as a way of improving their career prospects.

Alternatively, an older person works hard as a solicitor and needs accommodation for six months whilst they work away from home. They are willing to help an older or disabled person and understand that they might need to learn some new things to do so effectively. This person may not wish to participate in any time-consuming learning activity.

Common approaches to providing information and learning opportunities include:

- information or “move-in” pack;
- one to one time with the Homeshare Programme Co-ordinator or a specialist professional eg community nurse, social worker or dietician;
- planned time with the Householder or their representatives;
- formal training offered by the Homeshare programme or accessed via a local training provider eg first aid course;
- information leaflets or fact sheets obtained from specialist organisations eg information on visual impairment from RNIB;
- planned support meetings or group sessions for Homesharers which could include visiting speakers, presentations or discussion;
- reading list or access to a resource library, e-learning courses or DVDs.

Practice example

A Homeshare programme run by Vitalise runs regular group sessions for its Homesharers, which include opportunities for peer support, for staff to offer advice and for training.

Practice example

The Homeshare programme in Madrid has a requirement that a prospective Homesharer should attend a four-hour introductory training session prior to being matched with a Householder. This includes an overview of roles, boundaries, risks and harm minimisation.

Thereafter, short seminars on working with older people are offered on a weekly basis.

6.3 Arrange the move-in

The participants arrange the move in with support from (but not directed by) the co-ordinator. Co-ordinators often visit or call on the day of the move-in to offer support.

“Move-in Packs” for the Homesharer often include:

- a letter confirming the match and giving advice on settling;
- advice on what to do in an emergency or if they have concerns;
- contact details for the Homeshare programme and relevant professionals;
- information specific to the needs of the Householder.

6.4 Draw up an agreement between both parties

Once the Householder and Homesharer decide to go ahead with the Homeshare match it is essential that an agreement is drawn up between them, which defines the expectations of both parties in clear and accessible language. In some programmes, the agreement is drawn up ahead of the move-in wherever practical, so that participants have clarity from the start.

Some programme co-ordinators prefer to visit the home on the move-in day to spend time with both parties and to support them to complete the agreement, although for some participants this can add to the stress of moving in.

Lesson learned

Victoria Harwood from Homeshare Oxfordshire recognised that reading and signing the Homeshare Agreement can be very daunting for Homeshare participants. She sends a blank copy of the form to participants well in advance so they can consider any questions.

In some programmes, the agreement is drafted beforehand, but finalised in the first week of the match, once people have got to know each other.

The agreement also outlines the legal rights of the match partners and the obligations Homeshare programme. Although it is extremely rare for Homesharing matches to be the subject of legal action, this is possible, so programmes should seek legal advice on the Homeshare agreement that they plan to use in their programme. See Appendix B for a model. Agreements should cover:

- the date the arrangement will begin, will end (if known), or if the agreement is open-ended;
- the names of the parties and the shared address;
- a statement of the aims of the match and the general terms and conditions;

- the role of the Homeshare programme in providing support to the match;
- what happens when the arrangement ends;
- a statement about shared and private space in the home;
- furniture etc provided by the Householder or brought by the Homesharer;
- an agreement on informing one another of normal hours of work/study/leisure and anticipated absences from the home;
- arrangements for purchasing, cooking and sharing, purchasing other household items and the use of the telephone, television, computer etc;
- how both parties use of utilities will be assessed and bills shared;
- any issues to do with pets, smoking, use of alcohol, car parking, visitors and overnight guests.

Lesson learned

Victoria Harwood from Homeshare Oxfordshire recognised that a number of Householders found it difficult to assess the right financial contribution for a Homesharer to make towards utilities bills. She has adopted a “guideline” contribution towards each bill based on average costs. This can then be adapted in negotiation with both participants.

Some Householders may find it difficult to enter into an Agreement or may not have the mental capacity to do so. If this is the case they can be formally represented by someone else as long as they have agreed to this arrangement and it is legally valid. It is advisable for Homeshare Programme Co-ordinators to have an understanding of mental capacity issues. See notes on the Mental Capacity Act in Section Seven.

Key Point

It is essential that whatever form the Agreement takes, it does not inadvertently create a contract of employment or confer occupancy rights on the Homesharer.

If the circumstances or situation of either party changes, then the agreement should be adjusted to take these changes into account.

Step 7.Support and Monitoring

Homeshare is an arrangement between two adults with the capacity to make informed choices, who will, therefore, take most of the responsibility for the success of the arrangement. The Homeshare programme facilitates this arrangement but does not take on the same responsibility for its success as a registered care or housing service. However, the people involved in the Homeshare programme are often vulnerable and may need some help and support in establishing and maintaining the match.

The Homeshare Programme Co-ordinator has to find a balance between providing the necessary support and monitoring, whilst recognising the limitations of their remit and the responsibilities of the Homesharer and the Householder for the arrangement’s success.

In the early stages of a match, the aim of support and monitoring is:

- to support both parties to adjust to the new shared living arrangement;
- to assist both participants to reflect on how the Homeshare agreement is working in practice and whether any aspect needs reviewing.

As the match matures, the role of match support and monitoring is:

- to monitor regularly the satisfaction of both parties with the arrangement;
- to support them to identify problems and find solutions;
- to assist both to deal with issues that arise and access any resources needed;
- to support participants to end the match at a time that is right for them and in a way that satisfies both, where possible.

Common methods of support and monitoring include:

- regular, scheduled telephone calls or visits to both parties;
- the Homeshare Programme Co-ordinator being available at set times for meetings;
- email and postal correspondence;
- training or facilitated groups for Homesharers and Householders;
- contact with family, friends or representatives of Householders.

Key Point

Extract taken from publication “Homesharing Matching for Independence,” published by the Council for Jewish Elderly, Chicago USA.

“Research indicates that the first three months are a critical time in the life of the Homesharing arrangement and that performing sufficient and timely follow- up to discuss potential problems can prevent matches from ending (Pritchard 1983)”

7.1 Phone or visit soon after the move-in.

Many programmes visit or call on the move-in day and again a few days afterwards.

7.2 Agree the level of support and monitoring with both parties

Many programmes have an agreed support and monitoring schedule for all matches. Both parties should feel that they have someone to turn to if they encounter any difficulties, but should also have realistic expectations of the service.

Practice example

Joan Wilkes at Homeshare Hertfordshire and Audrey Heard at Homeshare West used the following match monitoring schedule for all matches:

- Phone call the day after move-in
- Phone call one week after move-in
- Home visit within the first month
- Phone calls every month until the end of the match

Matches naturally go through changes and different stages as people learn more about each other and their needs and relationships change, so the level and kind of support needed will change over time.

Key Point

Extract taken from the Wesley Homeshare Manual.

Stages of the match

Matches generally go through a series of stages. The timing and tailoring of support to the match and the stage is very important.

1. Most matches go through an initial stage consisting of the moving in and the early days of living together when participants may experience a “honeymoon” phase. The Homesharer may be like (and feel like) a guest at this stage. This is when everything goes smoothly and seems ideal.
2. After a while however, the differences between match participants may become more obvious and one or both of the match participants may begin to feel annoyed, or trapped in the situation. This is the “disillusionment” stage.
3. If the differences and perceived difficulties can be worked through, the match then usually settles into the “acceptance” stage. As this acceptance matures and deepens, many match participants can even laugh over the feelings they had at previous stages!

Not all matches follow this model. For instance, sometimes participants in a match are “out of synch” and may experience each stage at a different time from their match partner.

However, the early days of the match tend to be when it is at its most vulnerable and when support can be particularly important. Certain types of matches seem to be particularly vulnerable, such as those where:

- the Homesharer is very young;
- the householder has had little recent experience of sharing their home;
- the Householder is suffering from a degree of confusion or early dementia.

Some programmes complement the support given by the programme co-ordinator with additional support provided by volunteers or even peers.

Practice example

Solidarios, an organisation interested in social justice and social volunteering, is linked to the University of Madrid. It has had a successful Homeshare scheme since 1995.

Experienced Homesharers help to support less experienced Householders or Homesharers. They may provide peer support for up to ten people involved in matches, making regular contact and reporting back to the programme Co-ordinator.

Lesson learned

In the early stages of the NAAPS pilot Homeshare programmes, the co-ordinators carried out regular monitoring visits. Over time participants began to feel that these visits were at best unnecessary and at worse led them to look for problems that would not otherwise have given cause for concern. So co-ordinators continued to make regular visits in the early stage of every match but then reduced regular contact where this was not required.

Where matches continue for some time, an annual review of the Homeshare Agreement should take place. This review enables participants to reflect on their experiences, to make decisions about its future or to think about things they would like to renegotiate. The Householder's family, friendship or carer network may need to be included in reviews.

7.3 Record regular visits or contact as agreed

A record should be kept of ongoing support and monitoring and any outcomes. This will enable the Homeshare Programme Co-ordinator to:

- quantify their workload;
- hand over work to colleagues;
- produce statistics showing activity and issues in the Homeshare programme;
- be consistent with participants;
- have evidence of help and guidance given.

Some programmes have a match monitoring spreadsheet and a "contact record" which allows the recording of contacts, actions and outcomes in more detail.

Step 8. Support matches to end

All Homesharing matches come to an end. There is a range of causes. A proportion end before the end of the agreed period, whilst others carry on for longer than was planned.

Key point

There is often an assumption that Homeshare matches usually break down as a result of the Homesharer moving on. However, in statistics taken from two Australian programmes run by Wesley and the Benevolent Society for older people, the same proportion of matches end at the request of the Homesharer as at the request of the Householder.

There are three main ways in which matches come to an end:

A planned ending at the conclusion of the agreed period.

Some people wish to Homeshare for a set period because of study or employment commitments or planned life changes, such as travel, marriage etc.

Unplanned ending due to changed circumstances.

A Householder may become ill, develop more extensive care needs, or even die. A relative

may move in with the Householder or a Homesharer may unexpectedly have to move.

Unplanned ending because of breakdown of the match relationship.

Relationships break down due to general incompatibility, irresolvable conflicts, or simply a change of mind by either party.

In all of these situations one or both parties may wish to be considered for another match, or they may wish to leave the programme altogether. Agreements should include the anticipated duration of the Homeshare arrangement, the agreed notice period and what happens in the event of an early end to the match.

No matter when or how a match comes to a close, all parties should be treated with respect. Either one may experience shock or grief and need reassurance or support.

Discussions with both parties should begin well before the end of the agreed period. For all endings, the Homeshare Programme Co-ordinator should ensure participants:

- finalise any outstanding accounts such as phone or electricity bills;
- forward any correspondence or phone calls;
- remove possessions;
- clean and tidy up vacated accommodation;
- return keys or other items.

When matters have broken down irretrievably between participants it is important to act quickly and not leave parties in a situation of simmering conflict whilst living together.

In the event of such an unplanned match closure, temporary support arrangements (possibly provided by another service) may be necessary to enable the Householder to remain in their own home while a rematch or alternative support arrangements are made.

The Homesharer may need assistance or advice in finding alternative accommodation at short notice.

The reasons, actions and outcomes of all endings should be recorded in case files.

Part Seven: Legislation (England) and Homeshare

Introduction

Homesharers must never provide direct assistance with bodily functions or "prompting with supervision", nor must an un-regulated Homeshare programme provide these services through other means. These exclusions within the definition of Homeshare mean that Homeshare is not a regulated service. There are, however, a number of pieces of legislation with which Homeshare programmes in England must comply.

The way in which some pieces of legislation (eg aspects of health and safety legislation and insurance requirements) impact on Homeshare is still felt to be unclear. NAAPS works with government to attempt to clarify the legislative position in these areas and reviews new legislation and guidance in order to assess their impact upon Homeshare. We have made every effort to ensure that this section of the guide is accurate at the time of going to press, but this is not an exhaustive guide to legislation and guidance and it should be noted that government policy and its interpretation by regulators are subject to constant change. Always seek training and professional advice on areas of your practice which may be affected by legislation or guidance.

1. The Health and Social Care Act 2008

This Act:

- Reformed the regulatory system for health and care services in England.
- Established the Care Quality Commission (CQC) as a new integrated regulator for health and adult social care bringing together existing health and social care regulators into one regulatory body, with tough new powers to ensure safe and high quality services.
- Limited regulation of adult social care services (with some exceptions) to those providing personal care.
- Broadened the definition of personal social care.

The definition now covers:

- (a) Physical assistance with bodily functions (listed but broadly as before)
- (b) The **prompting and supervision** of a person to do any of the activities listed, 'where that person is unable to make a decision for themselves in relation to performing such an activity without such prompting and supervision'.

CQC is careful to note that although many of the elements of this definition of personal care cover daily living, personal care represents a social care **service** and activities outside that context will not be registerable. For example, informal reminders from time to time by friends, neighbours or wardens of sheltered housing will not constitute a service of "prompting together with supervision" if they are just a case of neighbourly help, rather than a formal service in which the person is taking responsibility for prompting and supervising.

In addition, personal care only triggers the need for registration if it is:

- (a) Provided to persons who, because of old age, illness or disability are unable to provide it for themselves; and
- (b) Provided in a place where those persons are living when the care is provided, such as their home.

Regulated personal care and Homeshare

Homesharing arrangements do not involve direct assistance with bodily functions. Homesharers may occasionally provide prompts but do not take responsibility for prompting and supervision of the Householder and cannot be seen as a 'service of prompting together with supervision'. Homeshare therefore falls outside the requirement for registration with CQC.

Note the distinction between the regulation of personal care by CQC and the definition of "regulated activity" used in deciding eligibility for CRB checks and Vetting and Barring, below.

Areas for consideration

There is a thin dividing line between informal prompting and supervision (what CQC calls 'neighbourly help' and a 'service of prompting together with supervision'.

The Homeshare Programme Co-ordinator should:

- Ensure that Homesharers understand what is meant by 'personal care' and are clear that they are not supposed to carry out personal care tasks or take responsibility for prompting and supervising the householder as they carry out their own personal care tasks,
- Ensure that Homesharers understand that they should never lift or physically move the Householder. If the Householder falls, the Homesharer should ring the emergency services, keep the person warm and wait with them until help arrives.
- Ensure that Homesharers understand that they should never administer medication to the Householder (even an over-the-counter or homeopathic remedy).

2. Criminal Records Bureau (CRB) Checks

There is no legislative or regulatory requirement to carry out a CRB check on the Householder or Homesharer. At present, it is only lawful to request a CRB check for people engaged in certain defined activities. Some, but not all, Homesharers will fall into this group. Whilst Homeshare must not involve activities which meet the threshold for regulation as personal care by CQC (see above), some Homesharers will be engaging in a "regulated activity" as defined in the Safeguarding Vulnerable Groups Act 2006 (see Vetting and Barring below) and those Homesharers will be eligible to access CRB checks. Eligibility for access to CRB checks is set out at www.crb.homeoffice.gov.uk/eligibility.

Eligible categories include:

- Any work which is defined as regulated activity relating to vulnerable Adults within the meaning of Part 2 of Schedule 4 to the Safeguarding Vulnerable Groups Act 2006.
- Any position which otherwise involves regularly caring for, training, supervising or

being solely in charge of vulnerable adults within the meaning of section 59 of the Safeguarding Vulnerable Groups Act 2006.

The definition of “vulnerable adult” from Section 59 of the 2006 Act (p42 at http://www.legislation.gov.uk/ukpga/2006/47/pdfs/ukpga_20060047_en.pdf) is explained at www.crb.homeoffice.gov.uk/faqs/definitions.aspx. The definition includes a person who is aged 18 years or older and:

- is receiving domiciliary care in their own home
- is receiving a service or participating in an activity which is specifically targeted at people with age-related needs, disabilities or prescribed physical or mental health conditions. (age-related needs includes needs associated with frailty, illness, disability or mental capacity);
- requires assistance in the conduct of his or her own affairs [due to specific mental capacity issues as set out in Section 59 of the 2006 Act – see p43 of the link above].

For some activities (see Vetting and Barring below), a check of the Independent Safeguarding Authority (ISA) barred lists will be provided as part of the Enhanced CRB certificate.

The CRB will issue a CRB certificate free of charge if the person for whom a CRB check is required satisfies the following criteria:

‘A volunteer is a person who is engaged in any activity which involves spending time, unpaid (except for travelling and other approved out-of-pocket expenses), doing something which aims to benefit someone (individuals or groups) other than or in addition to close relatives’. See: www.crb.homeoffice.gov.uk/faqs/definitions.aspx

3. The Vetting and Barring Scheme (VBS)

At the time of writing, the future development of the Vetting and Barring Scheme in England is uncertain. Homeshare programmes must, therefore, seek up to date clarification on current arrangements, which could change soon after publication of this guide.

VBS aims to help organisations increase protection of children and vulnerable adults, by improving the current provisions for screening potential volunteers and employees. It does this through a registration system, stopping people who are deemed unsuitable from working or volunteering (or trying to volunteer) with children and vulnerable adults.

The Independent Safeguarding Authority (ISA) takes responsibility for making barring decisions, whilst applications for information relating to barring decisions is run by the Criminal Records Bureau (CRB).

The VBS integrates all four of the previous lists that indicate that someone should not work with children and/or vulnerable adults (The POCA & POVA lists; The Information held under Section 142 of the Education Act 2002 - formerly List 99 - and The Disqualification Order Regime), into one list, of those barred from working with children, and a separate (but aligned) list of people who should not work with vulnerable adults.

It is now a criminal offence for barred individuals to work or apply to work with children or

vulnerable adults in a wide range of “regulated activities”. Employers also face criminal sanctions for knowingly employing a barred individual across a wide range of work. In certain circumstances, employers, local authorities, education and library boards, health and social care bodies and professional regulators have a legal duty to refer to the ISA, information about individuals who they believe have harmed or may pose a risk of harm to children or vulnerable adults.

All workers and volunteers providing advice, guidance or assistance to “vulnerable adults” (or children), where this work is frequent, intensive or overnight, and whether this work is paid or unpaid, are included in the category of ‘regulated activity’ under the new system. Family and personal relationships are not included. A personal relationship in VBS is a relationship between or among friends (see section 58 Safeguarding Vulnerable Groups Act (SVGA)).

The question as to whether VBS applies to Homeshare depends on three questions:

1. Is the homeowner a "vulnerable adult" as defined by section 59 of the SVGA (see link in CRB section above)?
2. Can the homeshare arrangement constitute a "regulated activity" as defined by sections 5 and 6 and Part 2 & 3 of Schedule 4 of the SVGA (see link in CRB section above)?
3. Is the contact frequent (once a week or if delivering health or personal care once a month), intensive (on three or more days in a period of 30) or overnight (between 2-6am)?

It is likely that some Householders will meet the definition of “vulnerable adult”, but it is possible that some will not. For the purposes of the Vetting and Barring Scheme, people are not defined as a vulnerable adult just because they may be older, have an illness or have a disability. The list of groups who meet the definition of vulnerable is extensive. The list includes, those “receiving support, assistance or advice, the purpose of which is develop an individual’s capacity to live independently in accommodation or support their capacity to do so”. A Householder could also be a "vulnerable adult" by virtue of Section 59(1)(h) and (9) of the SVGA, if they receive any service or participate in any activity provided specifically for persons who have particular needs because of their age or any form of physical or mental disability.

A Homesharer could fall into the category of engaging in "regulated activity" as defined in Sections 5 and 6 and Schedule 4, Parts 2 and 3 of the SVGA if, under the agreed arrangement, they were, for example, required frequently to provide homeowners with either "any form of care for or supervision for vulnerable adults" (see para 7(1)(b) of Schedule 4) or "any form of assistance, advice or guidance...wholly or mainly for vulnerable adults" (see para 7(1)(c) of Schedule 4).

If a Householder meets the definition of “vulnerable adult” and the support meets the SVGA definition of “regulated activity”, the scheme should consider carefully whether the support planned for them has strayed into the realm of personal care, which can only take place in services regulated by CQC: see notes on the Health and Social Care Act 2008, above.

As Homeshare can involve older people who are on either side of the definition of “vulnerable”, it will necessary to consider the application of VBS on a case by case basis and to take advice on the application of VBS to your scheme’s particular activities. Note

the differing rules around access to CRB checks, above.

If the Homeshare arrangement is subject to VBS, then the person who is responsible for the management or control of the Homeshare programmes is likely to fall within the definition of a regulated activity provider and, as such, will have a responsibility to first check if Homesharers are on the Barred List before accepting them onto the programme. In certain circumstances, the Homeshare programmer as a regulated activity provider, also has a legal responsibility to refer people to the ISA where they have concerns about their suitability to engage in regulated activity.

Key point

The Coalition Government is reviewing which activities will fall under the Vetting and Barring scheme. Currently, arrangements brought in in October 2009 remain in place until the review is completed. See www.isa-gov.org.uk for up to date developments.

4. Mental Capacity

The Mental Capacity Act came into force in 2007. It is a legal framework to protect any person over 16 who may lack capacity to make decisions in their lives. The underlying principle is that all individuals should be seen as having capacity to make a decision, unless it is established that they lack capacity to make that decision.

Mental capacity (the ability to make decisions) can vary over time and depend on the decision to be made. Some people need support to make a particular decision, but a person is not to be treated as unable to make a decision merely because they make a decision seen as unwise by others.

If someone's capacity is in doubt, it should be assessed for each individual decision. This can be done by any carers or staff who know the person well. This process, support offered and any decisions made should be recorded.

Homeshare staff should receive training in the Mental Capacity Act and assessment. They need to be able to assess whether a potential Homeshare participant is able to:

- understand information relevant to the decision;
- retain the relevant information long enough to make a decision;
- use or weigh the information to make a decision;
- communicate their decision (by any means).

Sometimes decisions have to be made on a person's behalf, in their best interests. There are rules about how this can be done lawfully. Where a Householder lacks the capacity to enter into a Homeshare agreement without assistance, serious consideration should be given as to whether they will be able to participate in Homeshare without compromising their safety, placing unreasonable demands upon the Homesharer or requiring personal care (see above), which is a registered service outside of the scope of Homeshare.

Further Information on the Mental Capacity Act is at: www.dh.gsi.gov.uk/mentalcapacityact

5. Housing legislation (including the Housing Act 2004)

Occupancy agreement

Areas for consideration

It is important that the arrangement under which the Homesharer occupies the property has not inadvertently given tenancy rights and that, if the arrangement breaks down, the Homesharer can be required to vacate the property immediately. For instance, it is important not to give the Homesharer exclusive use of their bedroom. See the sample Homesharing agreement in Appendix B.

If a Homeshare arrangement breaks down but the Homesharer refuses to vacate the property immediately, the co-ordinator will need to ensure that the Householder has the legal support necessary to take legal action to evict the Homesharer.

The Homeshare Programme Co-ordinator should:

- Take legal advice when drawing up a Homesharing agreement.
- Plan for the event of a Homesharer refusing to vacate a property promptly.

Houses in Multiple Occupation (HMO)

The Housing Act 2004 requires the owners of houses in multiple occupation (with three or more people in a shared house) to register with their local authority housing department. The Office of the Deputy Prime Minister (now the Department for Communities and Local Government) stated that Homesharing arrangements will be covered in the exemptions from houses in multiple occupation, as long as there are no more than two people accommodated with the Householder. A landlord can usually live with up to two tenants without requiring an HMO licence.

6. Employment legislation

An arrangement in which one person provides a service to another in return for money or something else of value, such as accommodation, can be viewed as a contractual arrangement. Such an arrangement would then be subject to employment law with a range of implications, including the application of the national minimum wage and the working time directive.

Areas for consideration

The Homesharing agreement should describe the voluntary nature of the Homesharing arrangement. The Homesharer does not receive accommodation *in return* for providing a specified level of support to the Householder. The sample agreement in Appendix B is designed with this in mind, but the Homeshare Programme Co-ordinator should take legal advice on drafting a Homesharing agreement which avoids any inadvertent contractual agreement.

7. Tax and benefits legislation

Homeshare programmes should avoid giving individuals tax and benefits advice. Tax advice should only be given by advisers regulated by the Financial Services Authority.

Income tax

Her Majesty's Revenue and Customs (HMRC) has confirmed that they will not treat provision of accommodation or of support as taxable income. Also, the principle private residence relief within capital gains tax should be unaffected by the Homesharing arrangement (ie there will be no liability for capital gains tax on any profit from the sale of the Householder's home). They advise however that the occupancy arrangement should be clarified in the Homesharing agreement.

Homeshare Programme Co-ordinators should ensure that the agreement clarifies that the Homeshare occupies their room under a licence arrangement and that the householder has access to their room as and when required.

Council tax

Liability for council tax is governed by the Council Tax (additional provisions for discount disregards) Regulations 1992.

People living alone are able to claim a 'single person discount' on Council Tax. Homesharers who are youth trainees, apprentices, students or student nurses will be disregarded for the purposes of council tax and the householder will not in those circumstances lose their single person discount.

Householders with Homesharers who are not disregarded for the purposes of council tax will lose their single person discount. They will, however, be entitled to the second adult rebate as long as the Homesharer is not paying rent. The Housing Benefit Strategy Division has confirmed that 'a person is entitled to the second adult rebate if they are a resident of the property, are liable to council tax on that property and if any other resident does not pay them rent to live in that property'.

Areas for consideration:

Two other categories of people currently disregarded for the purpose of council tax are care workers and carers.

Care workers are defined as people 'who are employed by charities and other organisations and who in turn receive a small remuneration for their work'. The care worker must be 'engaged or employed to provide care or support for at least 24 hours a week, in receipt under his engagement or employment of not more than £30 remuneration a week, and resident in the premises provided by or on behalf of the relevant body or by his employer'.

Carers are defined for the purposes of council tax as people who are living with the person that s/he is caring for, is not their spouse or parent, cares for someone who receives high rate DLA (care) or high rate attendance allowance and provides care for at least 35 hours a week on average.

Some Homeshare programmes have categorised the Homesharer as a 'care worker' or 'carer' in order to ensure that the Householder retains their single person discount. It is unlawful for an individual to claim tax relief on false pretences. Where a Homesharer meets the definition of 'care worker,' this would suggest that they have a contract of employment with the Householder, leading to the problems noted earlier in this section. Similarly, it is unlikely to be appropriate and safe for either party, were someone to provide 35 hours or more of unpaid care to a disabled person within a Homeshare arrangement.

People are exempt from paying Council Tax altogether if they live alone and have a serious mental impairment or severe learning disability. In that situation if a Homesharer moved into the property council tax would need to be paid and this would normally be passed on to the Homesharer.

Homeshare Programme Co-ordinators should:

- Where Homesharers are youth trainees, apprentices, students or student nurses, obtain confirmation from the council tax office that the Homesharer will be disregarded for the purposes of council tax and the Householder will not lose their single person discount.
- Where Homesharers are not disregarded for the purposes of council tax: support the householder to apply for the second adult rebate as long as the Homesharer is not paying rent.

Benefits

Benefits rules change frequently and their application varies according to individual circumstances, so individual advice should be sought. This guidance was produced April 2010 and does not take into account pending benefits reforms due 2011. For instance, reform to Local Housing Allowance levels may affect Householders' Housing benefits claims. Where the Homesharer or the Householder is in receipt of means-tested benefits, there is a risk that the Department of Work and Pensions (DWP) will treat accommodation provision or support services as notional income for the purpose of calculating benefit entitlements.

Areas for consideration

The position can depend on a number of variables, such as the benefits claimed by the Householder and/or the Homesharer and expert advice should always be sought. Some general points are:

- If the Homesharer pays rent, the rent is taken into account as income in the assessment of the Householders' income related benefit.
- If the Homesharer does not pay rent:
 - The Homesharer is treated as a non-dependent. This will have an impact upon housing benefit entitlement for both the Householder and the Homesharer. The Homesharer can lose all or most of any previous Housing Benefit entitlement (depending upon whether the Homesharing arrangement requires the Homesharer to pay for any 'eligible charges' which can be claimed for through

Housing Benefit). The Householder will have their housing benefit entitlement reduced by up to £57pw if the Homesharer is earning a reasonable wage. Housing benefit will not be affected if the Homesharer is not earning at all or is on a low wage or if they are a full time student.

- The provision of free accommodation is treated as 'income in kind' and is disregarded for the purpose of means-tested benefits.
- The support provided by the Homesharer may be treated as 'notional income,' as far as the Householder is concerned and may affect any means-tested benefit that they receive.
- If the Homesharer receives Severe Disability Premium (SDP), s/he could lose that entitlement when they move in to live with another person.
- A Householder could be entitled to Council Tax benefit if his/her assessed income (which may or may not be his total income, because some of it is disregarded for this purpose) is lower than his/her assessed needs figure (as prescribed by central government). The benefit can be anything from 50p a week to the full amount of the council tax liability, depending on the "excess income" figure.
- The rules relating to non-dependants apply to Council Tax benefit in the same way as they do to housing and other benefits, so unless the Householder receives attendance allowance, his/her Council Tax Benefit would be affected by having a Homesharer.

Homeshare programme co-ordinators should establish a relationship with a welfare benefits expert and ensure they have access to expert advice.

8. Health and safety

Health and safety legislation is complex and ever changing. The health and safety executive has not yet given clear guidance about the application of health and safety legislation to Homesharing arrangements. While the Householder's home is clearly a domestic premise it may also be seen in certain circumstances as a place of work.

Despite this lack of clarity, NAAPS has been able to obtain guidance in two key areas:

a. Food safety:

European legislation was introduced in January 2006 requiring people that provide meals for payment to register as a food business. As Homesharers should not be paying for meals, this legislation seems unlikely to apply to Homeshare.

b. Fire safety:

The Office of the Deputy Prime Minister (ODPM) (now Communities and Local Government) issued a fire service circular informing the fire service that the Shared Lives fire safety code of practice is to be extended to Homeshare. Such a circular will form part of the fire policy archive for later reference.

Areas for consideration

In the absence of clear guidance from the Health and Safety Executive it would seem sensible to make a general requirement that a Householder should provide safe and homely accommodation for the Homesharer. All domestic householders have general health and safety responsibilities with regard to:

- Fire safety.
- Gas and electrical safety (with appliances and equipment installed and regularly inspected and maintained by a professional regulated by the appropriate body).
- Electrical inspections should be carried out every ten years; electrical equipment should be maintained and used properly.
- Maintenance of their home (essential repairs and maintenance necessary to ensure the safety of the home should be promptly carried out by a competent person).

The Homeshare programme co-ordinator should address the issue of risk within the property with the Householder and Homesharer in a way that supports Homeshare as a private domestic arrangement. Both participants could be advised on areas of health and safety of which to be aware and to discuss regularly, bringing any concerns to the attention of the co-ordinator.

See further actions within Section 5.

9. TV licences

The concessionary licensing centre has suggested the household licence may cover all televisions in the house if it is clear in the Homeshare agreement that the Homesharer and Householder live as one household.

The Homeshare programme co-ordinator should:

- Ensure that the Homeshare agreement makes it clear that the Homesharer and the Householder live as one household.
- Check with the local TV licensing authority before confirming that the Homesharer will not require a separate TV licence for a TV in their bedroom.

Part Eight. Finances and Funding

Homeshare can be a relatively low-cost service in comparison to more traditional support and housing options.

This section looks at the costs of setting up and running a programme and the potential savings to individuals and the state that an effective programme can generate.

Savings produced by an effective Homeshare programme

Homeshare can be an effective preventative service. Gains for the state include:

- Support and companionship to Householders who would not be eligible for state interventions, reducing the risks of falls or ill-health and delaying the need for health and social care services. Homesharers can spot health or social care problems at a much earlier stage.
- The availability of support to the Householder at night and during weekends and bank holidays, when other forms of support are expensive to provide.
- The presence of a Homesharer can reduce the number of call-outs to police and fire services from a Householder who has become isolated and anxious.

Homeshare can help Householders to save money that they might otherwise need to spend on support. Where a positive relationship is formed there are likely to be gains in well-being and mental health which are hard to quantify.

Homeshare can help the Homesharer to save accommodation and commuting costs. The receipt of free accommodation can remove the need for the Homesharer to claim Housing Benefit. Homeshare has the potential to make education or employment an affordable option to someone who might otherwise be unable to take them up.

What are the actual costs of running a Homeshare programme?

Homeshare requires marketing, the careful recruitment of participants and ongoing support for matches. Its costs are largely the costs of employing and supporting a Homeshare Programme Co-ordinator. Staffing levels and the costs associated with them vary with factors such as the nature and number of different client groups covered and the rurality of the programme's area.

There are, however, several core costs that all programmes will have to consider:

- The salaries and additional costs of recruiting and employing one or more Homeshare Programme Co-ordinators.
- The salaries and additional cost of recruiting and employing support staff such as an Administrator or financial adviser.
- Arranging temporary cover during any prolonged periods of sickness or absence.

- Office or other work-base costs including rent, running costs, equipment and stationery.
- Purchase or lease of information and communication technology such as mobile phones, computer, email facility, fax, telephones.
- The travel costs of the co-ordinator. S/he will need to travel extensively to meet and interview Householders and Homesharers.
- The cost of publicising and marketing the programme: the cost of articles, adverts, leaflets and publicity materials can be high, as can professional public relations support.
- The costs associated with effective management and governance. This includes the cost of providing the co-ordinator with management support and costs associated with managing the programme budget and making sure that the programme meets all its legal requirements.
- Insurance costs.
- Miscellaneous costs such as the purchase of professional literature, staff development, attendance at conferences and seminars.

Financing a Homeshare programme

Homeshare programmes may be able to access a range of funding streams, depending on which groups and stakeholders are likely to benefit from the scheme.

Individual older or disabled people (and their families) may be willing to contribute towards the costs of their Homeshare match in order to gain the benefits of having a Homesharer. Individuals who are looking for housing in expensive areas may be willing and able to contribute towards the costs of their Homeshare match.

It may be possible to make a funding case to these agencies:

- Local authorities adult service departments and health agencies;
- Disabled, older people's groups or other community organisations;
- Funders, such as charitable trusts, with an interest in safer communities, independent living, the welfare of older people, intergenerational initiatives;
- Higher and further education providers and agencies which work with students;
- Large employers, particularly public services employers attempting to recruit low paid workers in expensive areas;
- Not for profit organisations which aim to recruit volunteers and would wish to be able to house them;

It will be necessary to tailor the case for funding to the priorities of these different stakeholders. This will require an understanding of their targets and performance indicators and the culture within which they work. It may be possible to gain in-kind support such as office space or use of meeting facilities, as well as or instead of financial support.

If the programme relies heavily on grant funding, it should be noted that applying for grant

funding is time consuming and can be hit or miss. A new Homeshare programme may be relatively easy to gain funding for, because it is a new and innovative initiative, but it may be less easy to gain continuation funding for from the same sources. The priorities of grant funders also tend to change over time. Homeshare programmes which receive start-up funding should plan from the outset for their sustainability. This should include considering all the ways in which information on participants, satisfaction levels and outcomes can be recorded, collected and analysed in order to demonstrate the costs and benefits of the programme.

The benefits and challenges of charging Householders and Homesharers

A recent report produced by Wesley Homeshare in Melbourne, Australia analysed the benefits and challenges of charging Householders and Homesharers. They began by identifying the tasks undertaken by the Homeshare Programme Co-ordinator to manage the Homeshare programme and to broker and support successful matches. Each of these activities has time and resource implications to the Wesley programme, which will be shared by many other programmes:

1. Advertise for Homesharers and Householders.
2. Provide printed information and talk to potential participants on the phone.
3. Home visit to potential householder.
4. Initial interview with potential Homesharer.
5. Provide details of potential matches to both parties.
6. Arrange and attend introductory meeting.
7. Follow up introductions and support next steps: getting to know each other, planning a trial, deciding on a start date etc or starting the search again if match not suitable.
8. Draw up a Homeshare Agreement
9. Contact all parties the day after move-in, one week after move-in and monthly thereafter to monitor the arrangement.
10. Mediate to resolve any difficulties
11. Support matches to end and find a replacement Homesharer when one leaves.
12. Endeavour to find a temporary or reliever Homesharer if required during a holiday or break for the regular Homesharer.
13. Provide information about other services and forms of support that may be of assistance.

As often neither party is eligible for state support, but both parties benefit significantly from Homeshare, there is an argument for charging participants in order to meet the costs of the Homeshare programme. If a Householder is eligible for state funding to meeting their assessed social care support needs and those needs are met by a Homeshare arrangement, they will be able to draw on a Personal Budget (if they take their social care entitlement as a personal budget) to pay this fee.

There are a number of possible approaches to charging:

1. Householders and Homesharers are charged a "set-up" fee for joining the Homeshare programme.

In this model, participants are charged a joining fee and then charged after the first match is made and for every subsequent rematch. A typical fee might be between £100 and £200.

Joining fees can bring regular, unrestricted income to the programme. Participants are charged more when they benefit from the scheme and when they draw significantly on resources in the form of rematches, which is a fairly proportional approach from the point of view of participants and of the scheme. Some potential participants may be put off by paying a fee before they were sure they were going to benefit from joining the programme.

2. Householders and Homesharers are charged a monthly or weekly "support fee".

In this model, typical fees are between £10 and £30 per week. In areas where accommodation and/or care is expensive or difficult to obtain, fees of this nature can be competitive with the costs of alternative options for either party. They can be more difficult to maintain in areas where costs are low and it may be necessary to charge different rates to Householders and Homesharers which reflect differing local conditions.

Monthly or weekly fees bring a regular and consistent income into the Homeshare programme and may help participants to recognise the ongoing costs of maintaining matches although equally they may raise expectations of ongoing support which are not appropriate to Homeshare. It can be difficult to justify charging a regular fee if little ongoing support is needed. The administration costs of collecting, monitoring, chasing, ongoing fees can be considerable, even with direct debit facilities.

Model Homeshare Agreement

Disclaimer:

This sample Homesharing Agreement was drafted in July 2009 for illustrative purposes only. Several areas of law including housing, tax, benefits and contract law, which are complex and ever-changing, are relevant to good practice in this area. We cannot guarantee that this sample represents current good and legally sound practice. Organisations and individuals are strongly advised to obtain their own independent legal advice about the terms and liabilities of the agreement that will be used by their Homeshare programme. It aims to set out the expectations of a voluntary arrangement, avoiding creating contractual obligations.

DEFINITIONS

The Householder: The person who owns or is a tenant of the property and who is offering accommodation.

The Homesharer: The person who is seeking accommodation and who is happy to offer some support on a voluntary basis.

The Property: The property owned or tenanted by the Householder .

PARTIES TO THE AGREEMENT

This Homesharing Agreement is between

The Householder

[Name of Householder]

[Address of Householder]

And

The Homesharer

[Name of Homesharer]

The agreement is facilitated by [our Homeshare programme]. This Homesharing Agreement should only be amended with the approval of the parties involved and [our Homeshare programme].

THE TERMS OF THE AGREEMENT

The Trial Homesharing Agreement will begin on [date] and will be reviewed after a trial period of [number] days. The Agreement contains no contractual obligations but instead sets out expectations.

General expectations

1. Homesharing arrangements allow Householders and the Homesharers to share accommodation and family life. It provides benefits to both the Householder and the Homesharer. The Homesharer volunteers to help with household and other agreed tasks whilst living with the Householder. The arrangement also provides companionship and the opportunity to learn from each other
2. Homesharing is a voluntary arrangement. The Homeshare Agreement cannot be treated as and does not create a contract of employment.
3. The Homesharer occupies their room on a licence arrangement. The Householder will respect the Homesharers' privacy but reserves the right to access the room if necessary. The Homesharer does not therefore have exclusive use of their room and their occupancy does not create a tenancy.
4. The Householder and the Homesharer are responsible for insuring their own possessions and insuring against any risks arising out of the Homesharing arrangement.
5. The Householder is responsible for ensuring that their home is safe and free from hazards. The Homesharer has, however, a responsibility for safety in the home and is expected to act as a responsible household member.
6. Any dispute between the Householder and the Homesharer will be referred to the Homeshare Programme Co-ordinator, [our Homeshare programme], who will work with both parties to resolve the dispute.
7. The Agreement may be reviewed on request by either party and in any case will be reviewed annually, beginning a year from [start date]. Amendments to the Agreement should only be made with the approval of both parties and the Homeshare Programme Co-ordinator.
8. In normal circumstances, it is hoped that participants would give reasonable notice before ending the Agreement. Seven days notice during the first trial month and 30 days' notice after that would be a guide to reasonableness.
9. Immediately if the Homeshare Programme Co-ordinator decides that there has been unacceptable behaviour by either party, an irreconcilable breakdown, a serious breach of the Agreement or some other factor affecting the safe and satisfactory continuation of the Homesharing arrangement. In that case the Homesharer will vacate the property immediately, leaving the property and the Householder's possessions in good order and condition, returning any keys to the property to the Householder and paying any money owing towards household bills etc.
10. [Our Homeshare programme] is not an agent for either the Householder or the Homesharer. The programme acts as a facilitator, supporting both parties to agree an acceptable housing arrangement.
11. [Our Homeshare programme], its management and staff cannot be held responsible for any claims, damages or consequences that may arise from this arrangement.

Expectations within this Homesharing arrangement:

The Householder and the Homesharer have agreed:

1. That the Householder will not make a charge to the Homesharer for their accommodation.
2. To respect each other's privacy and right to peaceful living arrangements.
3. To keep each other informed of normal hours of work/study/recreation and any anticipated periods of absence from home.
4. The Homesharer and the Householder will ensure that each knows when the other is going to be late or away.
5. That the Homesharer may have use or shared use of the following parts of the property and the Householder's possessions:

[Detail to be agreed]

The Homesharer will use the room in which they are staying and the Householder's possessions of which they have use in good order and clean and tidy.

6. That the Homesharer will assist the Householder with the following:

[Detail to be agreed]

Assistance will be provided flexibly to suit the requirements of both parties and normally for no more than 10 hours each week.

7. The following arrangements for the purchase and storage of food and preparation of meals:

[Detail to be agreed]

8. The following arrangements for the purchase of cleaning products, house cleaning and laundry:

[Detail to be agreed]

9. The following arrangement for payment of household utilities (gas, electricity, water):

[Detail to be agreed]

10. The following arrangements about the telephone, television and internet services:

[Detail to be agreed]

11. The following 'house rules':

[Detail to cover smoking, alcohol, loud music or television, late night music or television and any other area important to both parties.]

12. Any limitations on friends visiting the Homesharer at the property:

[Does the Homesharer need to seek permission; will the Householder wish to meet the friends; can friends stay late or overnight?]

13. That any gifts that they give each other will be limited to inexpensive presents at traditional times.

14. That the Homesharer cannot be a beneficiary under the Householder's will and vice versa.

15. That at the end of this agreement, or when asked to by the Householder, the Homesharer will vacate the property, leaving it and householder's possessions in good order and condition, returning keys to the property to the Householder and pay any money owing.

16. This Homeshare Agreement does not constitute a tenancy.

I understand the expectations of this voluntary agreement and that it creates no legal obligations.

The Householder

Name of Householder:

Date:

Witness to the involvement of the Householder:

Name:

.....

Address:

Date:

The Homesharer

Name of Homesharer:

Date:

Witness to involvement of Homesharer:

Name:

Address:

.....

.....

Date:

Name of Homeshare Programme Co-ordinator witnessing agreement:

.....

Date:

Changes in the agreement.

When the expectations set out in the Homeshare agreement above change, please discuss with the Homeshare coordinator, who will make a note of the changes below.

[Please list any changes]

The revised Homesharing Agreement period will begin on [date]. We expect it to be relevant for a period of [x days]. The Agreement may be extended or amended with the approval of both parties and [our Homeshare programme].

I understand the expectations of the Homesharing Agreement

The Householder

Name of Householder:

Date:

Witness to involvement of Householder:

Name:

Address:

.....

Date:

The Homesharer

Name of Homesharer:

Date:

Witness to involvement of Homesharer:

Name:

Address:

Date:

Name of Homeshare Programme Co-ordinator:

.....
Date:

Whilst this agreement is not a contract and so avoids asking participants to give signatures, we do advise that participants fill in their names and the dates personally.

Acknowledgements and thanks

The Homeshare Project Steering Group

The 2005/6 NAAPS and Oxford Brookes Homeshare projects were managed by a Steering Group established with the support of the Social Care Institute for Excellence (SCIE). The group contributed in numerous ways. Members included:

David Ellis	Senior Policy Adviser, SCIE, chaired the group
Annie Stephenson	Senior Policy Advisor, Help the Aged
Clive Newton	National Development Manager - Health & Social Care, Age Concern England
Nan Maitland	Director of Homeshare International
Joan Wilkes	Programme Co-ordinator, Homeshare Hertfordshire
Andy Murphy	CEO, London Care Connections
Henry Demaria	Strategy Adviser, Supporting People, Department for Communities and Local Government
Steve Morris	Head for Carers and Family Members, Royal Mencap Society
Carol Whittaker	Care Services Directorate, Department of Health

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- Nan Maitland and Gwen McKinnell who allowed the use of material from the Community Care Trust 1997 publication - Homeshare Programme Co-ordinators Manual. Details available from Nan Maitland at Homeshare International, hi@homeshare.org
- Beris Campbell who allowed the extensive use of material from the 2005 version of the Wesley Mission Melbourne publication - Intergenerational Homesharing: A Planning and Operational Manual. Details available from Beris Campbell at Wesley Homeshare, BCampbell@WESLEY.org.au
- Mr. Solans, Monica Duagues, Alfonso Farjardo and the staff of Solidarios, Anne-Lotte Kreickemeier for their help, support, advice and sharing their programme material.

Other documents seen or used as reference include:

- 'Homesharing: Matching for Independence 1999', The Center for Applied Gerontology, Educational Division of Council for Jewish Elderly. Details from www.cje.net, or from

the National Shared Housing Resource Centre www.nationalsharedhousing.org.

- The 2004 Publication 'Homesharing Know How – A Toolkit for Co-ordinators' produced by Audrey Heard and Joan Wilkes with the support of Help the Aged. Details available from Audrey Heard at Homeshare West, enquiries@homesharewest.org.

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Homeshare International:

hi@homeshare.co.uk

www.homeshare.org

Other Homeshare websites include:

www.centerofconcern.org

www.draycotthomeshare.co.uk

www.enlivenhomeshare.co.nz

www.homesharesociety.ca

www.interfaithhousingcenter.org

www.Linkages.org.uk

www.nationalsharedhousing.org

www.phcs.org.au

www.vitalise.org.uk

www.wesley.org.au