



# **HomeShare Program**

## **Provider Orientation Packet**



**Dear HomeShare Applicant:**

We are pleased that you have decided to consider ElderHelp’s HomeShare program. For more than 25 years older adults have benefited in many ways from a successful HomeShare Match. For example, they enjoy security and peace of mind knowing someone else is in the home and renting that spare bedroom can provide extra income. A compatible and helpful housemate will provide services like housekeeping, transportation and meal preparation, to name a few. Often lasting friendships are formed through companionship and mutual support. The best part is you can remain independent in your home and enjoy a quality of life you wouldn’t find anywhere else.

If you would like to consider the possibility of HomeShare keep in mind that you will make the final decision about who your housemate will be; we do not place anyone in your home. We perform careful screening and background checking of all applicants and do our best to ensure you will not be put in jeopardy in any way as the result of a HomeShare match.

We suggest you read this packet thoroughly and if you have any questions do not hesitate to contact us.

We look forward to working with you.

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## Non Discrimination Policy

ElderHelp of San Diego does not discriminate based on sex, race, color, religion, sexual orientation, national origin, ancestry, citizenship, pregnancy, marital status, age, physical disability, mental disability, medical condition, genetic information, or any other consideration made unlawful by federal, state or local laws, ordinances, or regulations. All such discrimination is unlawful. ElderHelp of San Diego is committed to complying with all applicable laws providing equal housing opportunities.

## What is HomeShare?

HomeShare is an affordable shared housing program that focuses on maximizing the use of existing housing stock. The HomeShare program matches seniors who want to remain in their own homes with adults of all ages who are in need of housing. HomeShare is a simple solution that offers great benefit to older adults and those seeking more affordable housing. Each person has a private bedroom and may or may not share a bathroom, along with access to the common living areas (i.e. kitchen, living room, etc.).

### *Participants*

- **Home Providers** are people who want to share their homes and vary in age, health and economic status. They must be mentally, emotionally, physically, and financially self-sufficient, but may require some hands-on assistance. Home Providers may be receiving personal care giving, but it is not the responsibility of the Home Seeker to serve in this capacity. Some older adults may work or may be retired; they may be individuals or married couples; or may have adult children in the home. Since homes vary, the residence being shared may be a house, apartment, condominium, duplex, townhouse, manufactured home or a senior community. The Provider may rent or own their home; however, the majority of people sharing their homes are owners.
- **Home Seekers** are adults of all ages looking for affordable housing that may not wish to live alone or cannot afford to do so. They may be working people, students, retired, or someone who is in a lifestyle or career transition. They must be mentally, emotionally, physically, and financially self-sufficient.

### *Types of HomeShare*

- **Rental** arrangement: the Home Provider will rent out a spare bedroom for extra income. Additionally, they may require utility costs and sometimes a security deposit.
- **Service exchange** arrangement, the Provider may offer a rent free in exchange for services such as transportation, cooking, housekeeping, laundry, running errands, yard work, handyman, companionship, pet care, hands-on care (transferring, etc), or medication reminders to name a few.
- **Mixed** arrangement, the Home Provider will offer a severely reduced rent in addition to services such as transportation, cooking, housekeeping, laundry, running errands, yard work, handyman, companionship, pet care, hands-on care (transferring, etc), or medication reminders to name a few.

## Service Exchange Arrangement

Some examples of the services you may provide in exchange for reduced rent or no rent are:

- Meal preparation
- Transportation

- Cooking
- Housekeeping
- Laundry
- Running errands
- Yard work
- Handy person
- Companionship
- Pet care
- Medication reminders

Although you and your housemate will negotiate all aspects of your service exchange arrangement, here are some guidelines that may help you:

- Up to 20 hours/week in services = a rent free room
- Over 20 hours/week in services = room and board
- Personal time is negotiated between the parties
- When transportation is provided, the Provider may pay the Seeker mileage, at the current going rate, when the Seeker uses his/her own car. Sometimes the Seeker will provide transportation using the Provider's car and no mileage is paid.

*Note: The information above is not a rule, merely a guideline to help with the matching process. All aspects of the housing arrangement are negotiated between the Home Provider and the Home Seeker prior to conducting a match agreement.*

HomeShare is not meant to be a home health service and Seekers are not expected to provide personal care services which include:

- Bathing/assistance with bathing
- Dressing
- Bathroom assistance
- Turning or lifting
- Service which brings the housemate in contact with bodily fluids
- Medical service (i.e. injections or administering medications)

## **Rental Arrangement**

The **rental arrangement** is an opportunity for the Provider to remain independent in their home by renting out a spare bedroom, as well as provide an affordable housing option for people of all ages.

Rental rates are established by the Home Provider, which may include utilities, cable, phone, internet service, and other charges (i.e. storage fees) that are paid separately by the Seeker. A deposit may be required at the Provider's discretion; however, every situation is different.

Once a match has been initiated, ElderHelp will provide a Rental Agreement which follows fair housing laws in California and is meant to protect both parties. In a rental arrangement, the Seekers are expected to share housekeeping chores and clean up after themselves.

## **A Self-Questionnaire for Those Considering Sharing Their Homes**

1. Why do I want to HomeShare with someone?
2. What are your greatest concerns about bringing in a housemate?
3. Do you have a family member or trusted friend available to provide guidance and support if needed?
4. What are your expectations about sharing your home with another person?
5. What kind of relationship do you want with your housemate?
6. Do you have any particular interests or activities you would like to share with your housemate?
7. How adaptable, flexible, and willing are you to compromise if necessary?
8. Do you like the idea of eating meals together?
9. Are you comfortable with your housemate using your kitchen?
10. Are you willing and able to express your needs easily, or is it difficult for you to speak to someone when something is bothering you?
11. How do you generally resolve differences or conflicts?
12. How important is your private time? Would you enjoy someone around the house?

## **Eligibility Criteria for HomeShare Provider Applicants**

### **Personal Requirements**

- You like the idea of a housemate and want to participate in HomeShare.
- You are able to participate in the interview and assessment process without the help of a third party. A family member or trusted friend may be present; however, you must answer all of the questions yourself.
- You are able to provide for your own personal care, or have other help in place to assist you with your personal care needs.
- You are able to transfer on your own if you use a wheelchair.
- You do not need assistance during the night, except in a case of an emergency.
- You do not need 24-hour care and/or supervision.
- You can advocate for yourself and communicate openly and clearly.
- You are a person of good character.

### **Residency Requirements**

- Reside in the city of San Diego, in a 921... zip code, or in the cities of Poway or La Jolla.

- Your home must be safe and clean.

### **Sharing your Home**

- You must have private bedrooms for you and your housemate(s), as well as, a private or shared bathroom inside your home.
- You must be willing to share the common areas of your home, to include kitchen privileges.

### **Income Requirements**

- You will be asked what the amount and source of your monthly income is.  
*\*Note: Income verification is for statistical purposes only.*

### **Health Screening Requirements**

- A signed release giving ElderHelp permission to send a questionnaire to your healthcare provider, or providers, is usually required.

### **Reference Requirements**

- Three (3) personal references who have known you at least five (5) years and with whom you have regular contact.
- References may not be family members, significant others, or life partners.
- References may be friends, neighbors, professional colleagues, pastors, and others with whom you have regular contact with.

## **Enrollment Process for Home Providers**

Following are the steps involved in the process to enroll you in the HomeShare Program, which generally takes one to two weeks.

1. Complete the “**Provider Screening Form**” on both sides, and return it using one of the following options:
  - Mail to or drop off at the nearest HomeShare office:
    - 3860 Calle Fortunada, Suite 101 San Diego, Ca 92123
    - 13094 Civic Center Dr., Poway, CA 92064

**PLEASE NOTE:** At the discretion of the HomeShare Coordinator, a telephone interview may be conducted in lieu of the “**Provider Screening Form**”.

2. Read the “**Eligibility Criteria for HomeShare Provider Applicants.**”
3. Read the entire “**Provider Orientation Packet**”.
4. The HomeShare Coordinator will schedule a one (1) hour home visit to interview you and assess your home. Interviews will only be scheduled once either a “**Provider Screening Form**” is turned in, or a phone interview has been conducted.
5. During the home visit, you will be asked to sign various documents, as well as, provide the names and phone numbers of your personal references, primary care physician(s), and any other health care providers(if applicable). (See Eligibility criteria for HomeShare Provider Applicants – page 6).

6. After the home visit, the HomeShare Coordinator will check your references, obtain a doctor's report (if applicable), and finish all necessary paperwork. When your file is complete, you will be advised whether or not you have been admitted into the program.

## **Referral & Matching Process**

When the registration process is complete, and you have been accepted into the program, you will refer individuals to you who match the criteria you've provided. With your permission, they will be given your name and phone number only. It will be entirely at your discretion to inform the seeker where you live when the time is right. Keep in mind that you take full responsibility for selecting a housemate, so choose carefully!

Here are some guidelines that might help you along the way:

- **Initial Phone Call.** When you receive a call from a prospective housemate, they should identify themselves with their full name and say that ElderHelp referred them.
- **Share Information.** You should have a conversation with the caller, in which, you and the potential housemate share information about yourselves. If you are offering a service exchange situation, explain what services you require and when you need the services. The caller should be prepared to tell you what they are willing and able to do for you, and something about their availability.
- **For a Rental Situation,** confirm the rental amount with the caller and tell them if you require a deposit or reimbursement for the utilities.
- **Meet in Person.** Once you have established a rapport and agree you would like to meet in person, invite the individual to your home, or another convenient location, to talk in more detail.
- **Do a Trial.** When you meet someone you might want to match with, it is suggested that you invite him/her to stay over as a "guest" for either a weekend, a week, or whatever both parties agree on. This is especially important in a service exchange situation! During the trial period, you should ask them to provide some of the services you'd require. A trial always gives a good indication of if the match will work.

Once both parties have agreed to live together, you should contact the HomeShare Coordinator within twenty-four (24) hours. The HomeShare Coordinator will schedule a mutually convenient appointment to meet both parties in the home to facilitate the Match Agreement. Although the match Agreement is not required, it is highly recommended to provide structure for the match and to protect both parties.

In the case of a rental situation, the HomeShare Coordinator will mail the Rental Agreement to you for completion. This is a simpler contract than the Service Exchange Agreement and does not need to be facilitated by the HomeShare Coordinator unless both parties request it.

***Keep in mind that you take full responsibility for who moves into your home. You may interview as many applicants as you like before you decide. Sometimes people match quickly, or it may take some time. You may take as long as you like!***

## **Talk it over!**

**Before a decision is made to move in with another person, think carefully about the following. Do not assume anything; talk it over.**

1. If you are considering a service exchange situation did you discuss details about what services you are willing and able to provide?
2. Do you get the feeling the applicant is willing and able to provide the services you need?
3. Can the applicant be available when you need them?
4. Did you talk about their need for time off and what would work for you?
5. Did you discuss privacy issues in the home, such as, should your housemate knock before entering your room and vice versa?
6. What about your housemate inviting guests over, such as their friends and families? Did you establish any rules or guidelines?
7. If your housemate will be providing transportation, whose car will they use? If it's their car, will you provide mileage reimbursement and how much?
8. Did you discuss pets, drinking, and smoking? What will you allow or not allow?
9. What kind of extra storage, if any, is available in your home for your housemate? Are you willing to provide some shelf and refrigerator space for their food and kitchen items?
10. If you are renting a room, have you both agreed on the rental rate, security deposit, payment of utilities, and when the rent is due?
11. Have all your questions been answered and do you generally have a good feeling about having this person live in your home with you?

***We know that honest and open communication is the key to a healthy and mutually rewarding HomeShare match. When you talk things over and “clear the air” before you move in, your match stands a much better chance of success.***

## **Fair Housing & Tenant/Landlord Law**

ElderHelp provides support by facilitating written agreements when individuals match. Both the Rental Agreement and Service Exchange Agreement are important tools which provide structure for the match and follow fair housing laws in California. When the agreement is in effect for less than a year, either party can terminate the agreement by giving a 30-day notice in writing. If the agreement is in effect for more than a year, the Provider is to give a 60-day notice and the Seeker a 30-day notice, per California law. ElderHelp's

HomeShare program is not liable or responsible for any legal action and/or fees associated with such action regarding your relationship with your housemate, including but not limited to eviction proceedings.

Everyone registered in the HomeShare program is required to follow all applicable tenant landlord laws. If you have any questions about your legal responsibilities, you may call either of the numbers listed below:

- Tenant Legal Center – 858-571-1166
- Center for Social Advocacy – 619-444-5700

## **Mediation Process**

The first month or two are usually an adjustment period for matched individuals. If conflicts occur which the parties are unable to solve themselves, they may request mediation by calling the HomeShare Coordinator. Both parties must agree to mediation before the process can begin. The HomeShare Coordinator will facilitate mediation by meeting both parties in the Provider's home and following a formal mediation process. Open communication between the parties is the key to a successful match; however, mediation is always available if requested.

## **Mandated Reporter**

Any person who has assumed full or intermittent responsibility for the care or custody of an elder or dependent adult, whether or not he or she receives compensation, including administrators, supervisors, and any licensed staff of a public or private facility that provides care or services for elder or dependent adults, or any elder or dependent adult care custodian, health practitioner, clergy member, or employee of a county adult protective services agency or a local law enforcement agency, is a **mandated reporter**. (W&I Code 15630{a})

***What Must Be Reported:*** Any mandated reporter, who, in his/her professional capacity, or within the scope of employment:

- Has observed or has knowledge of an incident or incidents, that reasonably appears to be the physical abuse, financial abuse, abandonment, isolation, abduction, the neglect by others and/or self-neglect.
- Is told by an elder or dependent adult that he/she has experienced behavior constituting physical abuse, financial abuse, neglect, abandonment, isolation or abduction. (W&I Code 15630 [b] [1]).

***When to Report:*** A mandated reporter shall report the known or suspected incident of abuse as soon as practically possible, by telephone and by written report within two working days. The written report is the State of California Health and Welfare Agency Report of Suspected Dependent Adult/Elder Abuse SOC 341form. (W&I Code 15630 [b] [1]).

A report may be made by calling Aging and Independence Services at 800-510-2020 and asking for the Senior Team. The Senior Team is co-managed with Adult Protective Services. It is also advisable to contact the HomeShare Coordinator to report any suspected incident of abuse and to discuss possible strategies for reporting the incident.

## ***Confidentiality***

The identity of the responding party is kept confidential

## **Resources**

### **1. Tenant/Landlord law for State of California**

[www.dca.ca.gov/publications/landlordbook/catenant.pdf](http://www.dca.ca.gov/publications/landlordbook/catenant.pdf)

Online copy of government publication titled “California Tenants: a guide to residential tenants’ and landlords’ rights and responsibilities.

This publication addresses “single lodger in a private residence”, and all aspects of CA housing laws.

### **2. Fair Housing Services**

Center for Social Advocacy - 619-444-5700; 800-954-0441

[www.hhrfha.org](http://www.hhrfha.org)

- Housing discrimination
- Tenant/landlord mediation
- Shared housing
- ...and much more

### **3. Housing Resources Guide – San Diego Housing Commission**

[www.sdhc.net/giAffordHsgRes.html](http://www.sdhc.net/giAffordHsgRes.html)

- SRO hotels in City of San Diego
- Housing Services Contacts Quick List
- Section 8 information
- Countywide Affordable Rental Housing list
- ... And much more.

### **4. Legal Matters**

Elder Law & Advocacy - 858-565-1392

[www.seniorlaw-sd.org](http://www.seniorlaw-sd.org)

- Some free legal services for people 60+
- Click on “Senior Citizens Legal Services’ Web Links” for the following:
  - California Codes
  - Legal Research Links
  - Senior Law Home Page
  - ...and much more

### **5. Shelters and Emergency Housing**

[www.sdhc.net/giAffordHsgRes5.html](http://www.sdhc.net/giAffordHsgRes5.html)

- Countywide homeless shelters

[www.hud.gov/local/ca/homeless/shelters/sdgshelter.cfm](http://www.hud.gov/local/ca/homeless/shelters/sdgshelter.cfm)

- Emergency housing and shelters in San Diego County

## **6. Adult Protective Services**

Aging & Independence Services (AIS), Senior Team – report suspected elder abuse  
800-510-2020 - ask for “Senior Team”

ElderHelp office has supply of “Report of Suspected Dependent Adult/Elder Abuse” forms which might be completed in certain cases. Senior Team can advise.

## **7. Mandated Reporters**

[www.leginfo.ca.gov/calaw.html](http://www.leginfo.ca.gov/calaw.html)

California Law – Welfare and Institutions Code  
Regarding mandated reporters

## **8. Domestic Violence**

National Domestic Violence Hotline  
800-799-SAFE

## **Shared Housing in San Diego County Service Areas - Updated 01/01/2018**

**ElderHelp** – HomeShare Program (City of San Diego)

Shanika Webb: 619-284-9281  
[swebb@elderhelpofsandiego.org](mailto:swebb@elderhelpofsandiego.org)

Robin Strickland: 619-284-9281  
[rstrickland@elderhelpofsandiego.org](mailto:rstrickland@elderhelpofsandiego.org)

**ElderHelp** – HomeShare City of Poway  
Service Area: City of Poway – Zip code 92064

Dana Vacante: 858-748-9675  
[dvacante@elderhelpofsandiego.org](mailto:dvacante@elderhelpofsandiego.org)