



HomeShare Program

Seeker Orientation Packet

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Seeker Orientation Packet

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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, handyperson, 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, handyperson, 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.

Eligibility Criteria for Seeker Applicants

Personal Requirements

- Physically, mentally, emotionally, and financially self-sufficient
- Able to advocate for one's self
- Assume full responsibility for every step of the registration process.
- You are a person of good character.
- If you have been evicted; the eviction must have occurred at least two years ago. Applicants are not eligible if they have had more than three evictions.

Residency Requirements

- You must reside in the county of San Diego to register in HomeShare.
- A valid telephone number and local mailing address where you can be reached.

Identification Requirements

- Valid photo identification (driver's license, California State ID, Passport, military ID, or student visa).
- Social security card; **OR**, provide your social security number.

Proof of Income

The following will be accepted as Proof of income:

- Copies of 2 most recent bank statements
- Paycheck stub showing year-to-date income
- Letter from Social Security Administration if you are receiving Social Security benefits, or Social Security Disability
- Other documents may be submitted, or substituted at the discretion of the HomeShare Coordinator.

Criminal Background Check

- Signed Authorization to a criminal background check (signed during enrollment interview.)
- Signed declaration (at the time of the personal interview) of no convictions of any felony or misdemeanor crimes involving bodily injury, assault, elder abuse, sexual offenses, possession or distribution of an illegal substance, or theft of personal property.
- Felonies automatically disqualify you from participation in HomeShare
- Misdemeanors are subject to review by the HomeShare Coordinator and may or may not disqualify you from participating in HomeShare.

Alcohol or Drug Dependency

- Prior history does not automatically disqualify you, but admittance is at the discretion of the HomeShare Coordinator.
- You must sign a statement confirming your sobriety for at least one year.
- Provide at least one reference (sponsor, etc.) who can attest to your sobriety.

Health Screening Requirements

- If treatment is being received from a physician, psychiatrist, social worker, or therapist, applicant must sign a release giving ElderHelp permission to send a questionnaire to the healthcare provider or providers.
- Whether or not treatment is currently being received, applicant may be asked to sign a release at the discretion of the HomeShare Coordinator.

Reference Requirements

- Supervisor reference (either one)
 - Current supervisor: known at least 3 months
 - Prior supervisor: no more than 1 year from last day of employment
- Landlord reference (either one)
 - Current: known at least 3 months
 - Prior: no more than 1 year from last day of residence
- Personal reference: known at least 5 years and is not related to you by blood or marriage. Personal references may not be family members, significant others, boy/girl friends, spouses, or life partners!
- Personal references known at least 5 years may be substituted for landlord and supervisor references at the discretion of the HomeShare coordinator.

Driving Requirements

The following documents are usually required for a service exchange arrangement:

- Copy of current driving record from the state of origin (if license is out of state) or the California Department of Motor Vehicles (if applicant has a valid driver's license)
- Proof of current California vehicle insurance (if applicant has an automobile)
- Proof of current California vehicle registration (if applicant has an automobile)

DMV convictions may or may not impact your eligibility. The following guidelines will be used:

- A DUI conviction within the last 2 years will automatically impact your eligibility.
- In addition, all other DMV convictions will be considered on a case by case basis and may impact your eligibility at the discretion of the HomeShare Coordinator.

Foreign Applicants & Immigration Requirements

- Foreign applicants may be registered in HomeShare if they can provide a valid photo ID (as stated in *Identification Requirements*) and a Social Security card (if applicable).

Application Process

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

1. Complete the “**Seeker Screening Form**”
2. Mail to or drop off at the nearest HomeShare office:
 - a. 3860 Calle Fortunada, Suite 101 San Diego, Ca 92123
 - b. 13094 Civic Center Dr., Poway, CA 92064
3. Fax to:
 - a. 619-284-0214 for San Diego
4. Read the entire “**Seeker Orientation Packet**”.
5. Read “**Eligibility Criteria for Seeker Applicants**” and gather all the required documents and information which pertain to you.

Enrollment Process

1. Once you have been identified by a Home Provider as a potential housemate, you will be contacted by a HomeShare Coordinator to schedule a personal interview at one of the local ElderHelp offices. **Personal interviews will not be scheduled until you can provide all of your documents.**
2. Attend a one hour personal interview with a HomeShare Coordinator, bringing all relevant documentation, as specified in the “**Eligibility Criteria for Seeker Applicants**” page.
3. After the personal interview, you will be contacted by the HomeShare Coordinator regarding the status of your file.

Note: If the results of your background check are not satisfactory, you will be denied enrollment into the HomeShare program.

4. Upon enrollment into the HomeShare program, you will be advised of the Home Provider whom expressed interest in you, and given their contact information to follow-up as a potential housemate (see Referral & Matching Process).

Referral & Matching Process

Once you've been accepted into the program, you will be given the referral(s) of the Home Provider(s) whom you match with. Keep in mind that you take full responsibility for who you decide to live with, so choose carefully!

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

- When you call the person, identify yourself with your full name and say ElderHelp referred you. You might also mention the name of the staff person you worked with.
- Tell the person something about yourself and ask them questions about their desired home life. If you are calling about a service exchange arrangement, ask him/her exactly what they need help with and share with them how you would be willing and able to help them.
- If you are calling about a rental arrangement, confirm the rental amount you were given and ask if they require a deposit or reimbursement for utilities.
- Once you have established a rapport, he/she may invite you over to the home to meet in person. The initial meeting usually takes place in the home; however, the Home Provider might suggest you meet in another mutually convenient location.
- When you go to the Provider's home, it is your responsibility to carefully assess the home environment to make sure you would be comfortable living there. If pets are involved, you will need to feel comfortable with them as well.
- If both parties believe the match might be a possibility, it is suggested you stay over as a “guest” for a short trial period (i.e. weekend, week, etc.). This is especially important in a service exchange arrangement, as the trial period would allow time to perform some of the services that will be expected of you. Furthermore, the trial period permits a glimpse into the everyday home life of the Provider.
- **It is imperative that you do not take steps to end your current housing situation before ensuring that the match will continue beyond the trial period.**

- Once both parties have agreed to live together, you should contact the HomeShare Coordinator as soon as possible.
 - In the case of a Service Exchange arrangement, the HomeShare Coordinator will schedule a mutually convenient appointment to meet both parties in the home to facilitate a Match Agreement. Although the Match Agreement is not required, it is highly recommended to provide structure for the match and protect both parties.
 - In the case of a rental arrangement, the HomeShare Coordinator will mail the Rental Agreement to the Home Provider for completion. This is a simpler contract than the Service Exchange Agreement and does not need to be facilitated unless both parties request it.

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.

- If you are considering a service exchange arrangement, did you discuss details about what services you are willing and able to provide?
- Do you fully understand what the other person needs and expects of you?
- Are you willing and able to provide the services the other person needs?
- Can you be available when your housemate needs you?
- Did you talk about your need for private time and time off?
- If you are providing transportation, whose car will you use? If it's your car, will he/she provide mileage reimbursement and how much?
- Did you discuss privacy issues in the home, such as, should your housemate knock before entering your room and vice versa?
- Did you ask about inviting guests over such as your friends and family?
- Do you have a clear understanding of rules about pets, drinking, and smoking?
- Did you discuss your need for extra storage, if required?
- 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?
- Have all your questions been answered and do you generally have a good feeling about moving in with this person?

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.

Creating a Successful HomeShare Match With Effective Communication

A successful HomeShare match is not possible without effective communication. From the moment you sleep over for the first time, communication becomes the primary catalyst to help determine whether or not you are compatible housemates. Communication is the glue that holds the match together or in a difficult situation may become the breaking point that ends the match.

Stages of a HomeShare Match

- **Honeymoon Stage:** Everything is going smoothly and the situation seems ideal. You may not notice the small ways you are different from each other, but those discoveries will come as time passes.
- **Disillusionment Stage:** You cannot really know how things will go until you actually live together under the same roof. Lifestyle differences and misunderstandings over everyday matters can become a challenge. You find you don't know the person quite as well as you thought you did.
- **Acceptance Stage:** You both come to know each other better and adapt to each other's preferences and style. Acceptance grows with time and helps you work through the small differences that occasionally arise in any close relationship.

Understanding Older People: A Bridge to Effective Communication

- **Different Backgrounds:** Today's elderly grew up in a different socioeconomic and political environment. Many experienced economic deprivation and received little formal education. As a result of growing up in an era with different value systems, traditions and experiences, their ideals and expectations may be far different from yours. Combined with various physical, psychological, and social changes that the elderly have to adjust to, and lack of understanding your part, communications may be adversely affected.
- **Physical Health:** Hearing loss makes you harder to understand, so be patient, make eye contact, and speak clearly. Face the person when you talk and eliminate distractions and background noise like TV. More information about communicating effectively with someone with hearing loss is available from your HomeShare Coordinator.

Speech and articulation problems may result when the individual's capacity to speak becomes more difficult because of health problems. The elderly person's voice can become weaker making it harder to hear or understand them. Be patient when listening and notice when the elderly person gets tired and wants the conversation to end.

Health changes in general can effect not only communication but overall functioning and the way the individual interacts with his/her environment. Patience, understanding, and willingness to listen and respond in a friendly manner will go a long way in nurturing excellent communication with your elderly housemate.

- **Psychological Health:** Processing information takes longer and can slow down the communication process. Be patient and give the person enough time to complete their thoughts. It is important not to rush the conversation.

Note: The above list is not necessarily indicative of all older adults. The information provided is meant to be a guide on common characteristics that may be encountered when living with older adults.

Communication Guidelines for Avoiding and Resolving Conflict

The key to avoiding or resolving conflict with your elderly housemate is to make the effort to understand what the other person is experiencing. The following are some suggestions to successfully handle housemate conflicts. It is easier to tackle a small problem rather than waiting until it gets out of hand.

1. **Take time to have conversations** with your housemate rather than assuming you know what the problems or issues are and you know how to fix them.
2. **Discuss only one issue at a time.** Clearly state the problem as you see it. Avoid being defensive, blaming or accusing the other person.
3. **Listen.** If they bring up something that seems unrelated to the matter at hand, it's tempting to want to interrupt and redirect the conversation. But, if you pay close attention, you might learn of a concern you were not aware of.
4. **Both parties must agree on what the problem is.** It helps to clarify what you think the other person is saying by paraphrasing. For instance you can respond with: "I'm hearing that you may be saying..., thinking..., feeling... Is this correct?"
5. **Ask questions, and listen carefully to the response.** Pay attention to what the other person is thinking and feeling to help you better understand the problem.
6. **Discuss solutions together** and respect the other person's suggestions.
7. Above and beyond everything else, be **patient with your older adult housemate.** They are doing the best they can and want the match to work just as you do.
8. Always feel free to **ask for help from a third party.** If needed, a mediation session can be scheduled with your HomeShare Coordinator.

Guidelines for Creating a Successful Match

1. **Discuss your needs and expectations, as they relate to your living situation, before you begin living together.** This is a vital component of building a successful match from the start.
2. **Insist on a Match Agreement!** It has been proven time and time again that shared housing has a much better success rate when a match agreement is in place. Your HomeShare Coordinator will facilitate it with you.
3. Be a good listener.
4. Be patient.
5. Resist the temptation to judge or criticize your housemate.

6. **Always ask, don't tell.** For example, ask what the other person's preferences are rather than telling them what you think they need or want. No one wants to live with a "know it all" person. Honor your housemate's need for independence and autonomy. You are not there to control their life; you are there to share it.
7. Housemate situations can sometimes get out of control and feel threatening to one or both parties. In these cases it is important to stop and take time to calm down and take care of yourself. You can set a later date and time to discuss the issue.
8. If you are considering a Service Exchange arrangement with your housemate, conduct a "**Trial Period**" prior to moving in permanently. Talk to your HomeShare Coordinator about how to do this.
9. Don't hesitate to **ask your HomeShare Coordinator for help** mediating problems. That's what they are there for.
10. Remember, the **first 30 days or so is always a period of adjustment**. By following the guidelines in this outline, your HomeShare match stands an excellent chance of success.

Frequently Asked Questions About the HomeShare Program

How long does the enrollment process take? Following your interview, it usually takes about 10-12 business days to complete the process. The timing varies greatly depending on how long it takes to get back reference, physician and background checks. Please let your references and doctor know that we'll be contacting them regarding your application with the HomeShare Program.

How long will it take to find me housing once I am enrolled? Once you are enrolled and begin connecting with available home providers (potential roommates), you may find housing as quickly as the same week you meet. Some people match quickly, and sometimes it takes a few weeks or months. Others never find the right situation within the program. It all depends on you, your specific needs and preferences, as well as the availability of home providers who fit your criteria.

Do you have a lot of people who are looking for a housemate? We receive over 150 inquiries each month from people interested in learning more about shared housing. Your special needs and preferences will determine whether or not you are a good fit for available home providers.

How much rent will I have to pay? The average rent at this time is about \$650/month, and you may be asked to pay a security deposit, share utilities and/or cable and internet services. Rents and other charges are usually negotiable between the parties. We can help to facilitate these conversations.

How long does a match usually last? The average length of a match is about 2 years. Some matches last longer, and some may end sooner. Although there is no set rule, HomeShare is meant to provide permanent housing lasting over 1 year. Our longest match lasted nearly 13 years.

Can I get a rent free room? Rent free rooms are sometimes available; however, it is likely that you will be asked to pay some rent, even if you are providing services. There is a high demand for rent free rooms, and availability is determined by the personal preference of the home provider.

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

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

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

- 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

- 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

- a. Countywide homeless shelters

www.hud.gov/local/ca/homeless/shelters/sdgshelter.cfm

b. 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

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

Robin Strickland: 619-284-9281
rstrickland@elderhelpofsandiego.org

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

Dana Vacante: 858-748-9675
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