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Evaluation of the Homeshare pilots

Final report

A report to Social Care Institute for Excellence (SCIE)

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Executive Summary

Introduction

Part of a series of three reports, this executive summary covers the third and final report from the evaluation of the Homeshare pilots programme (HSP), following the scoping report shared with the HSP partners and HSP sites in May 2016, and the interim report shared in July 2017.

What is Homeshare?

The Homeshare pilots initiative brings together older people and others who need support to stay in their homes (known as householders), with young people and others (known as homesharers), who provide companionship and ten hours per week of low level practical support in return for an affordable place to live. Participants¹ pay fees to Homeshare organisations on a monthly basis to support the matching process; and these fees are normally lower than the cost of other housing or support options. The model is adaptable, so that the homesharer rather than the householder may be the person with support needs, for instance someone with a learning difficulty.

The HSP² is funded by Lloyds Bank Foundation for England and Wales (LBF) and the Big Lottery Fund (BLF) who have collectively invested £2m to support eight HSP sites in England and Scotland to test and develop businesses which support Homesharing. The eight Homeshare schemes funded through the programme are:

- Age UK Isle of Wight
- Age UK Oxfordshire
- Click Nottingham
- Edinburgh Development Group
- Knowsley Housing Trust and Person Shaped Support (PSS)
- Leeds City Council
- Novus
- PossAbilities

HSP sites were selected through a competitive tender process and were asked to compile bids detailing their approaches, providing a business and financing plan, and identifying sections of the population to be targeted. HSP sites were awarded grants of a value between £111,400 and £267,091 from funders, which some HSP sites supplemented with funds from their own

¹ HSP sites vary in fee value and structure – some HSP sites chose not to charge householders.

² HSP Partnership comprises Lloyds Banking Foundation for England and Wales, Big Lottery Fund, Age UK, Shared Lives Plus, Foyer Federation and Social Care Institute for Excellence (SCIE).

organisations to develop and deliver Homeshare. The programme also funded the development of infrastructure support, including an online web portal, good practice guidance and tools, plus direct support to individual projects via Shared Lives Plus and a business mentoring offer.

The overall aim of the evaluation was to understand what works to develop a sustainable Homeshare scheme, though identifying:

- Which approaches and activities work best;
- Identifying barriers and what does not work in the establishment of a Homeshare site;
- Assessing the cost and benefits of the schemes; and
- Identifying what would encourage a wider take up of Homeshare, through the development of a framework of factors to be used by commissioners to assess bids for Homeshare schemes.

This final report presents summative findings from the baseline and endline³ phase of the HSP, identifying both ‘what works’ and the barriers faced within Homeshare in relation to operating sustainable local Homeshare schemes. It also identifies further learning on supporting sustainability and the legacy of the pilots. The evaluation findings are presented in full in this final report together with the **Technical Appendix** which includes detailed case studies.

The HSP and Homeshare more widely align with current commissioning priorities of maintaining independence, support to live at home, and an increasing focus in social care on person-centred co-designed service provision. Homeshare also provides an affordable housing option for young people and other single people in housing need. A key output from the evaluation is a framework of factors which can help commissioners to assess future Homeshare proposals in their local areas.

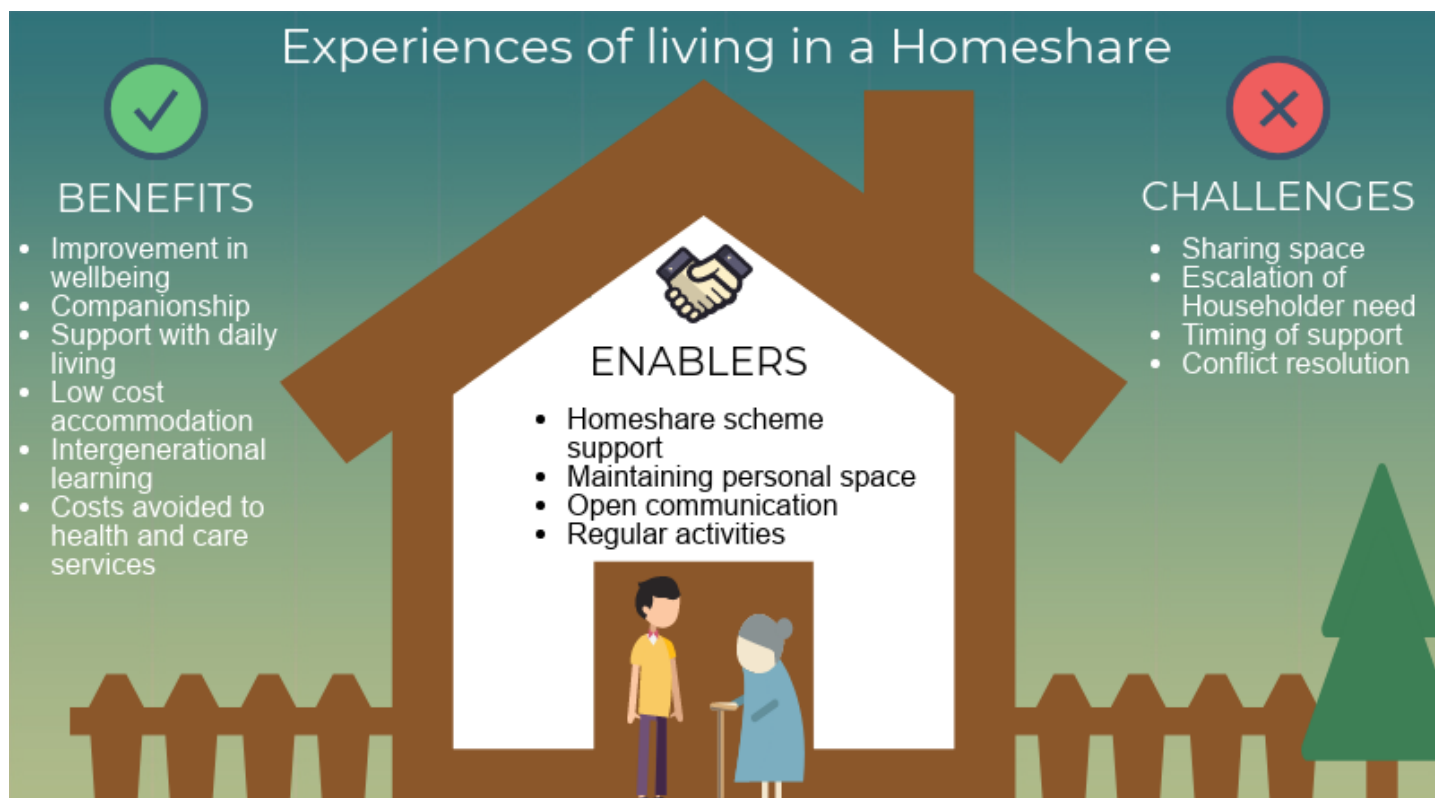
The report draws on qualitative interviews with pilot leads and staff (8 interviews), local authority stakeholders (14 interviews), referral agencies (10 interviews) and with householders and homesharers (26 interviews) from the first matches achieved in three HSP sites. This report is also informed by five rounds of deep dive interviews with sites (35 interviews), and interviews with HSP partners (6 interviews). One HSP site of the eight originally⁴ funded exited the programme in June 2017, and hence was not included in evaluation activity at the endline phase.

³ Following an initial scoping phase, the evaluation has been carried out in two phases, baseline phase (March/April 2017 and endline phase in October 2017). Both phases involved interviews with pilot leads, householders and homesharers and local authority leads for housing and social care and interviews with referral agencies. Baseline and endline phases were supported by five deep dive interviews and quarterly data collection through an independent evaluator tool. The methodology is explained in full in the accompanying Technical Appendix (Appendix A).

⁴ In June 2017, Click Nottingham chose to leave the programme, due to a change of staff and lack of traction with local partners so this report draws on the formative scoping and interim evaluation work with Click Nottingham but excludes data from the HSP site.

Experiences of living in a Homeshare

A summary of experiences from householders and homesharers are presented below:



Three sites (Age UK Oxfordshire, PossAbilities and Novus) had collectively achieved 26 matches by October 2017; no other HSP sites had achieved matches by this date. Across all HSP sites, numbers of matches achieved had fallen behind the site's earlier expectations. Moreover, HSP sites had faced delays in achieving matches due to the following reasons:

- It had taken longer than anticipated to establish a steady pipeline of referrals
- Time had been spent on referrals received for householders with needs too complex to be supported by Homeshare
- Locally limited housing available with spare bedrooms suitable for homesharing.

An updated summary of matches achieved by December 2017 is presented in the Addendum at the end of the report, where collectively HSP sites had achieved a further 2 matches, increasing the total to 28. Interviews were conducted with 13 matched pairs at endline, building on baseline interviews. Of individuals interviewed, 19 were female and 7 male. The average age of householders was 81, and of homesharers 34.

People who had been matched reported a number of benefits of living within a Homeshare:

- For householders these included: improvement in wellbeing (specifically in mental health); increased companionship which reduced loneliness and isolation; and practical help with household tasks which enabled them to maintain their independence at home. Householder fees varied across HSP sites between £50 and £130 per month.

- For homesharers these included: access to affordable housing provision, particularly in high cost areas such as London and Oxford, and better quality accommodation in relation to space standards and location. They also valued intergenerational learning and sharing skills, for instance, in cooking together or in using information technology. Homesharer fees varied across HSP sites between £125 and £200 per month.

Some of the challenges of Homesharing described by people who had been matched included: sharing space within the household; unexpected escalation of householder need; aligning daily living schedules and resolving conflicts between each other. Staff from the HSP sites supported householders and homesharers to resolve these challenges and build positive relationships by: helping them negotiate ways to maintain individual personal space; facilitating difficult conversations and open communication; encouraging people to organise scheduled, regular activities to undertake together and working with householder and homesharer to find solutions together when needs changed.

As well as the individual and social value indicated by these findings, they suggest that Homeshare may also help the local health and social care system avoid costs to the public purse through reduced use of social care services, reduced use of accident and emergency (A&E) services, reduced use of mental health services, and reduced assistance with daily living tasks which may otherwise need to be supported by local authorities.

Operating a sustainable Homeshare scheme

Factors to the aid commissioning of future Homeshare schemes

From analysis of data collection and through co-production with HSP sites, we have co-produced a framework of factors for commissioning Homeshare schemes which summarises learning from the HSP, and which commissioners are advised to consider in funding new Homeshare schemes. This is presented as seven key points for consideration by local authority commissioners, and presented in order of developmental phase:



1. **The existing establishment of, or clear plans to develop local partnerships:** local partnerships are important in being able to develop approaches and establish routes of referral with local authority leads in social care and housing, and local providers of complementary services and are required at both the operational and strategic level to be able to engage both commissioning teams and frontline staff.

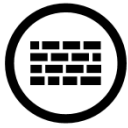


2. **Clear evidence of alignment with local need:** for example, schemes have already or show how they will work with local authority commissioners and referral agencies, and have or will undertake a robust and well evidenced analysis of local demography and local policy to identify viable markets within the local population which can be supported through the Homeshare model.



3. **A planned, targeted and sustained marketing approach from the outset:** demonstrating how sites will reach householder and homesharer audiences to raise and sustain awareness of Homeshare within referral agencies and members of the public. There should be clear evidence of the range of marketing approaches planned

such as online approaches, events and presentations to local groups and communities, and plans and timelines for monitoring a review of the approach.



4. **An institutional infrastructure with access to skills in policy development, service delivery and development of a sustainable business model:** whether this is achieved through being supported by an established local “host” organisation or an organisational structure that is robust enough to support the start-up phase, schemes should evidence how they will build in expertise in these key areas. Schemes should be able to demonstrate how they will draw in skills from within or outside the organisation to supplement the skills of core staff in developing their approaches, and evidence their existing knowledge and experience of supporting targeted homesharer and householder groups.



5. **Business plans which allow for flexibility in approach:** schemes should have clear plans which demonstrate how their approaches can be adapted to changes in housing and social care policy over time, to allow for realignment where necessary to accommodate new markets which may have emerged or to accommodate changes in local need (such as influxes of new populations or increased pressure within the local system).



6. **Policies and practice to evidence safeguarding and quality assurance of delivery:** schemes should have in place or demonstrate how they will develop or adapt existing policies on safeguarding, privacy and other risks which may arise through Homesharing, to ensure risk is minimised and to identify plans for management of the risk.



7. **Evidence of a bespoke matching process:** in generating matches, schemes should demonstrate how they take into account personal interests and support requirements of individuals to provide a firm foundation for the match and to optimise chances of match success. Matching processes should account for managing expectations around provision of ten hours of support in the early phases of a match and provide a clear indication of how support and communication is to be managed with both parties.

HSP sites have identified key learning in what works in operating a Homeshare scheme, presented in Table 1, below:

Table 1: What works in establishing a HSP site

Developmental factor:	What works - key learning:
Set up and ongoing management	<p>HSP sites found development of policies and practice for safeguarding and privacy were essential tools in their work to engage local partners and establish credibility.</p> <p>HSP sites situated within larger organisations benefited from being able to draw on the expertise and skills of other teams (for example in receiving advice on welfare and benefits) and three sites benefited from establishing an advisory group with specific areas of expertise to steer their work.</p>



	<p>HSP sites adapted their approaches over time both in their geographical coverage and by changing focus on their householder and homesharer groups. HSP sites also benefited from evaluating their approaches through use of independent local evaluators and internal reflective meetings.</p>
<p>Generating enquiries and successful referrals</p>	<p>HSP sites used a wide range of approaches to generate enquiries. All HSP sites found segmented marketing approaches effective, particularly use of websites to target homesharers and householders and speaking at community groups. They found that monitoring and reviewing the efficacy of their segmentation also helped them fine-tune their approach. HSP leads found that meeting face to face with potential applicants was important to best manage expectations about Homeshare and to provide early screening of potential applicants.</p> <p>Building relationships with local agencies supporting the same demographic groups was valuable in establishing routes of referral. HSP sites also found that monitoring demographic trends and projections helped to identify potential new markets for Homeshare.</p>
<p>Achieving and sustaining matches</p>	<p>Three HSP sites have achieved and sustained matches. Key aspects identified for successful matching were: establishing rapport with both householders and homesharers through interviews and discussing match preferences as part of the application and matching process.</p> <p>HSP sites found that responding with flexibility to individual preferences and managing expectations on the commitment and level of support that Homeshare provides were essential to establishing a firm foundation for matches.</p>
<p>Engaging local partners</p>	<p>To successfully engage local partners (local authority leads in adult social care and housing and referral agencies), HSP sites drew on their existing organisational networks as a key first step. They found it important to build partners' trust and confidence through addressing specific local concerns, for example, by sharing policy and practice documentation on how safeguarding and liability of risk is handled within an HSP site.</p> <p>Demonstrating clearly how Homeshare might contribute to or align with the aims and operational objectives of local organisations and potential new partners was also a key factor in developing relationships to enable routes of referral.</p>
<p>Accessing support, information and knowledge</p>	<p>HSP sites found the support provided centrally through the HSP programme partnership highly valuable. This enabled sites to learn from the experience of others and avoid "reinventing the wheel", whilst still tailoring their approach to address local needs. They found the good practice materials and suite of tools which supported their policy and procedure development particularly valuable as these were critical for engaging and reassuring local partners.</p> <p>Direct support and advice from Shared Lives Plus and Lloyds Bank business mentors also played a key role in problem solving. The web-based portal and on-line discussion forums hosted by Shared Lives Plus and the programme of "learn and share" events co-ordinated by Age UK enabled site leads to develop peer-supportive relationship over time so that sites increasingly felt willing and confident to support each other and share resources and practice between themselves.</p>
<p>Financial planning and sustainability</p>	<p>Sites found that flexibility in their financial planning was essential in order to adapt to unforeseen circumstances such as the longer timeframe for achieving matches. HSP sites, in dialogue with funders,</p>

	<p>adapted their use of partnership funding, particularly in allocation of budgets for staffing and for marketing in order to work towards longer term financial sustainability. For instance, delays in achieving matches led to one HSP site redirecting funding to marketing, whereas another site planned to underspend on marketing in order to see what worked for other sites.</p> <p>Different fee structures across HSP sites meant that there was variation in the number of matches required to achieve financial sustainability for each site, ranging from five to twelve matches per year to break even in year five. HSP sites with high upfront costs required a higher volume of matches to achieve sustainability.</p>
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Referring individuals to Homeshare

A core component of developing a quality Homeshare site is establishing routes of referral with local authority leads (in adult social care and housing) and independent organisations supporting people with low level needs. Local authority leads for housing and social care and referral agencies identified a number of challenges and opportunities for Homeshare (in Table 2, overleaf).

Table 2: Opportunities and challenges for Homeshare

 Opportunities:
<p>An approach focused on fostering strength and resilience in older people to support independent living.</p>
<p>A preventative approach which supports those with low level social support needs below eligibility thresholds for statutory social care.</p>
<p>Potential to help reduce demand for social housing.</p>
<p>Companionship and reduction of loneliness and isolation for both householders and homesharers</p>
<p>Potential to support particular demographic groups such as individuals with disabilities, refugees, older males and those with early onset dementia.</p>
<p>Low-cost support option, with potential to reduce local authority spending in social care and housing.</p>
<p>Supporting individuals discharged from hospital.</p>
<p>Option for Homeshare to provide housing for social care workforce (as a low-cost housing provision).</p>
 Challenges:
<p>The needs of a householder may escalate during a match, resulting in the need for more intensive support so the model has limited application for those with high or complex needs and there is a consequent risk of housing insecurity for homesharer.</p>

Good communication with referral lead officers is essential to ensure their understanding of the specific local Homeshare offer so as to achieve appropriate and successful referrals. However, this can be a lengthy process and sufficient lead-in time is therefore important and necessary.
A need for intensive marketing to raise awareness amongst local populations.
Perceived high rates of turnover in the frontline staff who would be in a position to refer individuals to Homeshare means that an ongoing information programme is required to sustain understanding and awareness of the service offer.
Some commissioner and referral agencies may be sceptical about the potential for compatibility between older and younger people Homesharing.
Lack of HSP matches to provide examples of how matches have worked in the local area.
Concerns about safeguarding.
Perceived lack of transferability of Homeshare model outside London.

Sustainability and legacy

HSP sites were mixed in their perceptions of the sustainability of their approaches. Four HSP sites were positive about the future and remained committed to continuing their work beyond the funded period, whereas three HSP sites were less sure of their future financial viability due to not achieving the volume of matches anticipated. HSP sites identified a number of strategies to ensure future sustainability beyond the funded period:

- **Adaptions to targeted householder and homesharer group:** Age UK IOW in response to local demand, considered financial viability was dependent on increasing the age of Homesharers and more flexibility on the age of Householders including older (over 50) homesharers matched with younger householders.
- **Extending geographical reach:** PossAbilities had started to work beyond Rochdale and to extend out to Nottingham (supporting individuals previously in contact with Click Nottingham) and York, where they had received interest from prospective householders.
- **Reviewing fee structure:** two sites had considered changing the fees they charged to householders and homesharers for support provided during Homesharing to improve financial sustainability. Age UK Oxfordshire had considered charging current and future householders for their participation in the scheme, and Age UK IOW were considering different models for charging fees.
- **Need for increased time to achieve matches:** All sites considered that they needed more time to achieve matches. Three sites (Leeds City Council, Novus and Age UK Oxfordshire) were in conversation with funders to re-profile their underspend and extend the funded period.

- **Planning scenarios for model beyond funded period:** both Age UK Oxfordshire and Novus had undertaken work to revise and review models of the number of matches achieved and to forecast their proposed response and development as a result of this.

During the endline fieldwork in October 2017, Novus reported they had achieved profitability for the first time as a result of changes to their staffing structure and the number of sustained matches.

Transferrable learning for Homeshare

There is a range of transferrable learning emerging from the programme about what works to develop and sustain a Homeshare scheme and its benefits. This is summarised in Table 3, below:

Table 3: Transferrable learning for Homeshare

Audience:	Learning points:
For householders and homesharers looking to participate in Homeshare, there are a number of key learning points:	<ul style="list-style-type: none"> • Person-centred individual matching is required, taking into account how living spaces can be shared and how the ten hours of support is provided, monitored and varied over the course of a match. • Clear communication during the match is needed between householders and homesharers to align expectations and resolve conflicts in the match. • Shared interests such as religion, political allegiance or hobbies and interests help to facilitate bonding. • Defined support boundaries, help ensure both parties are agreed on expectations around noise, shared space and time spent together. • Intermediary role of Homeshare provider helps to provide conflict resolution and to ensure the conditions of match are met.
For Homeshare providers, or organisations looking to establish a Homeshare scheme there are a number of key learning points:	<ul style="list-style-type: none"> • This is a “slow burn” initiative which takes time to set up and to develop policies, establish partnerships and communicate the concept. • There are a range of tools from the HSP to support development, including the LBF financial modelling tool, independent evaluator tool and policy and practice materials. • Sustained effort is required to engage local authority teams. • Sustained and segmented marketing is required to convey the Homeshare concept to referral agencies, local authority partners and the local population. • Lower levels of staffing reduce the number of matches required to achieve financial sustainability. • Social impacts for Homeshare participants carry an economic value in costs avoided to health and social care participants.

<p>For organisations working with Homeshare providers to refer prospective householder and homesharers there are a number of key learning points:</p>	<ul style="list-style-type: none"> • Working with Homeshare requires sustained engagement, as new schemes take time to develop approaches and approaches are subject to change as schemes evolve. • Matching takes time to establish, both in identifying appropriate individuals to be matched locally and ensuring match candidates have been approved through appropriate checks (such as DBS)⁵ • Homeshare is best suited to supporting lower levels of need. • Homeshare can support reduction of demand on housing and social care services for individuals with lower level needs.
<p>For local authority frontline staff, there are a number of key learning points to consider in working with Homeshare schemes:</p>	<ul style="list-style-type: none"> • Raising awareness requires time and a sustained effort, through engaging both strategic and operational level staff. • Provision of up to date information is important to ensure appropriate referrals from frontline staff. • Homeshare can effectively support low level social care and housing support needs. • Clear profiles of householder and homesharer facilitate appropriate referrals. • The role of Homeshare requires ongoing consideration as an option for providing support in light of changes to the benefit system.
<p>For potential commissioners of Homeshare schemes there are a number of key learning points:</p>	<ul style="list-style-type: none"> • Homeshare supports people with lower level needs who may not be eligible for social care support and provides an affordable alternative to social housing. • Aligns with preventative agenda and fostering resilience through self-care. • Flexible model which can be tailored to local need. • Increases good quality affordable local housing options for young people and other key groups. • Role of Homeshare requires ongoing consideration, and needs to be reviewed over time.

Social care and housing policy has implications for Homeshare now and will continue to do so in the future. For some people, Homeshare may contribute to ameliorating the impact of benefit reforms such as the removal of Support for Mortgage Interest (SMI) benefit, reductions in housing benefit due to having one or more spare bedrooms (“bedroom tax”), reductions in social care spending by local authorities and removal of housing benefit from Universal Credit. Conversely though, the loss of single person’s council tax discount, increases to the tax exemption from the rent a room scheme, loss of pension credit and reduction of housing benefit may be seen as barriers that some people will face when considering participating in a Homeshare scheme.

⁵ DBS – Disclosure and Barring Service

Transferrable learning on supporting innovation

The HSP offers transferrable learning beyond the Homeshare sector on what works in supporting innovation:

- Co-production approaches which engage pilot participants at both local and strategic level in developing successful and sustainable service delivery.
- The efficacy of partnership in funding and supporting the delivery of national pilots, by adopting a multi-disciplinary approach to the key issues of localism and economic sustainability to bring together and align partner priorities.
- Sector level support infrastructure with tools that provide long term benefits for both sites and wider audiences.
- Programme infrastructure which has the capacity to deliver a sustained body of evidence of “what works”.
- Strong foundation for further future work to strengthen the sector in ensuring quality assurance, robustness and validity of further learning generated by the programme legacy.
- Developing a suite of tools, templates and resources to support sector development, such as the Homeshare UK website to generate prospective enquiries, the Quality Assurance Framework to aid pilot site development and tools to assist in monitoring business activity (such as the LBF financial modelling tool and the Traverse independent evaluator tool)

Additionally, there is wider learning from the evaluation itself, about how to co-produce evaluation with HSP sites and their partners and managing the dual role of objective evaluator and learning and improvement partner. This approach has drawn on the principles of realist evaluation approaches to contextualise local findings and required a flexible approach; adapting the evaluation methodology in line with HSP site development.

Conclusion

The HSP has delivered a number of key learning points for Homeshare sites, local authority housing and social care teams, frontline housing and social care professionals, referral agencies and prospective householders and homesharers, summarised in Table 4:

Table 4: Key messages

Audience:	Key messages:
Prospective householders and homesharers	<p>HSP householders’ and homesharers’ experiences show that relationships are at the heart of every aspect of Homeshare, and that Homeshare currently:</p> <ul style="list-style-type: none">• Offers an opportunity to increase companionship between (usually) two single individuals, and to form mutually beneficial relationships.• Involves a bespoke match being made, accounting for personal characteristics of both householder and homesharers.

	<ul style="list-style-type: none"> • Promotes intergenerational learning, lasting social connections, companionship and improvement in mental health and wellbeing among matches. • Helps to reduce the use of secondary health care and social care services and for some people, save on the costs of receiving social care. <p>This is reliant on:</p> <ul style="list-style-type: none"> • Providing support to matches while working through alignment of daily schedules, sharing of space and deciding how the ten hours of support time will be spent. • Developing a strong householder and homesharer relationship which is supported by the role of a Homeshare scheme through tailored matching, and by providing intermediary support over the course of a match. • Clear communication between householders and homesharers over the course of a match, to support conflict resolution and the development of the householder and homesharer relationships.
Homeshare sites	<p>There is a range of key learning in ‘what works’ in the development of a Homeshare site, specifically in:</p> <ul style="list-style-type: none"> • Setting up: the development of policies and practice to assure partners of credibility, use of existing organisational contacts to develop working relationships, establishment of an advisory group to steer the approach and being open to working flexibly as approaches are developed. • Generating enquiries: the use of segmented marketing approaches, developing referral pathways with organisations with complementary aims to Homeshare and building relationships with prospective householders and homesharers by meeting face to face. • Sustaining matches: by establishing early rapport with householders and homesharers to build trust, managing expectations of what Homeshare will be able to provide, and establishing bespoke Homeshare arrangements, recognising that the support provided will change over the course of a match. • Engaging local authority partners: through providing policy and practice documents to demonstrate credibility and to address concerns. Sustaining contact is important; to update local authority partners on the current focus, needs intended to be supported by Homeshare and to ensure continued awareness during changes in staff. • Learning and development: use of monitoring and evaluation to identify success in engaging local populations and the efficacy of marketing materials, and to monitor wider demographic changes and new opportunities for the model. Ongoing learning is important to enable pilot sites to flex approaches to local conditions and to learn from each other’s experience through learning networks and peer support. • Financing a Homeshare site: there has been variation in use of funding from partners, with variation in spend on marketing, staffing structures, premises and travel. High upfront costs incurred in the set-up of a Homeshare site lead to a higher number of matches being required for the pilot site to become profitable.
Local authority social care and housing	<p>Evidence from HSP suggests that:</p> <ul style="list-style-type: none"> • Developing a sustainable Homeshare scheme is dependent on a continued, effective dialogue between local authorities and Homeshare schemes to allow the model to be refined to align with local priorities.

	<ul style="list-style-type: none"> • Within local authorities, Homeshare needs to be communicated at both the strategic and operational level, to allow senior buy-in, and to build strategic opinions on direction, but also for frontline staff to develop and maintain a working knowledge of how Homeshare can support local provision. <p>Local authorities are optimistic about the role of Homeshare to:</p> <ul style="list-style-type: none"> • Contribute to wider social care policy and practice, for instance by supporting older people to remain at home for longer, as a means of support for people below existing support thresholds and to target key demographics, such as older males (identified as an emerging key market for Homeshare by some local authorities). • Provide an alternative good quality and affordable housing option for young single people and others who are not in priority need for social housing.
Frontline housing and social care and housing professionals	<p>Engaged frontline housing and social care professionals are key providers of referrals to Homeshare. Evidence from HSP indicates that:</p> <ul style="list-style-type: none"> • Professionals can refer more effectively and appropriately with specific briefing on the role of Homeshare in meeting local need, including accurate information on the scope and target demographics of a Homeshare scheme. • The demographic and geographical focus of a Homeshare scheme may change in response to local demand, so referral professionals need timely and specific communications on changes in approach and any implications for referral arrangements. • Clear information for frontline professionals on the profile of appropriate householders and homesharers maximises their capacity to make viable referrals.
Referral agencies	<p>Evidence from HSP indicates that:</p> <ul style="list-style-type: none"> • Referral agencies are essential partners for building Homeshare sustainability through establishing effective routes of referral. • Consistent and clear communication between referral agencies and Homeshare scheme facilitates a shared vision of the role of Homeshare in meeting local need. <p>Homeshare is unlikely to be able to provide immediate support for someone approaching a housing or social care crisis, but does offer an alternate means of support for lower level housing and social support needs.</p>

The HSP has been successful in supporting the development of a number of Homeshare sites, with a clear legacy of learning and infrastructure to build stability for the wider Homeshare sector. While none of the HSP sites have met their original intended matching targets, three HSP sites have achieved matches during the programme, evidence indicates that their momentum is building, and the remaining HSP sites remain confident that they will achieve additional matches over time and most are on track to do so. As the HSP funded phase of work comes to an end, HSP sites have continued momentum, a legacy of learning, and established networks within the HSP and wider Homeshare sector which will enable continued development of their schemes. The HSP has made a substantial contribution to the body of evidence on “what works” in taking forward a sustainable and locally adaptive model of Homeshare service provision.

The HSP also offers a legacy of wider learning in what works in supporting innovation within delivery of social and housing support, and transferrable learning to inform commissioners, frontline professionals, referral agencies and prospective householder and homesharer groups in achieving this ambition.

1. Introduction and context for the evaluation

This chapter introduces the HSP and the evaluation. We explain the purpose of this report and describe the aims, principles and methods of the evaluation.



Homeshare is an initiative which brings together older people and others who need support to stay in their homes (known as householders), with young people and others (known as homesharers), who provide companionship and ten hours per week of low level practical support in return for an affordable place to live.

1.1. The Homeshare pilots programme (HSP) evaluation

This is the final report from the evaluation of the Homeshare pilots programme (HSP), following the scoping report (May 2016) and interim report (July 2017). This report presents a summative assessment of the impact of the HSP, drawing on the formative learning from the scoping and interim reporting stages and summarising findings from fieldwork interviews with pilot leads, local authority representatives, matched householders and homesharers, thematic deep dive interviews, and interviews with referral agencies. Findings provide summative learning from HSP sites to inform both continued HSP site development and an assessment of the impact of the programme for the HSP sites, HSP partners, for the wider Homeshare sector. It also draws out some broader learning for the social care and housing sectors on key themes such as sustainability, localisation, person-centred care and co-production.

1.1.1. The Homeshare model

Lloyds Bank Foundation for England and Wales (LBF) and the Big Lottery Fund (BLF) have invested £2m in the HSP to support eight HSP sites in England and Scotland between June 2015 and December 2017. HSP sites were selected through a competitive tender process and were asked to compile bids detailing their approaches providing a business and financing plan and identifying sections of the population to be targeted. HSP sites were awarded grants of a value between £111,400 and £267,091 from funders, which some HSP sites supplemented with funds from their own organisations to develop and deliver Homeshare. The eight selected HSP sites were provided with contracts and were monitored in activity by the funding organisations:

Table 5: HSP sites and their original aims

Organisation:	Original aim and objectives:
Age UK Isle of Wight (Age UK IOW)	Integrating housing into the wider health and social care agenda for older people. Testing Homeshare in an ageing population and with a variety of homesharers – e.g. divorcees, commuters from the mainland.
Age UK Oxfordshire	In context of an international university city, combined with a dearth of low cost housing options and under-occupation of housing, to provide affordable accommodation and options for linguistic and cultural exchange.
Click Nottingham	Promoting health, happiness and wellbeing for older people and allowing them to remain independent and socially connected. Linking with existing Click members and services and a social housing provider in Nottingham.

Edinburgh Development Group	Providing new options for people with learning difficulties to stay at home & for young people with learning disabilities living with their families at home, who may want to transition into more independent living. Linking with universities to offer affordable accommodation.
Leeds City Council	Encouraging independence and alternatives to institutionalised care. Fostering engagement between generations. Testing mature students, academics or weekday business people as homesharers to live near their place of work.
Knowsley Housing Trust & Person Shaped Support (PSS)	Demonstrating Homeshare in an area of deprivation. Providing stable tenancy and educational opportunities for young people not in education, employment or training, linked with Knowsley Community College. Testing new solutions in the context of welfare cuts.
Novus	Growing a sustainable business model of Homeshare in London through a consortium of carers' centres in London. Providing affordable accommodation for homesharers including those working in public sector and providing support for people with care needs and respite for carers.
PossAbilities	Targeting older female householders at risk of social isolation in Rochdale. Testing new options in an area of deprivation where many can't pay for traditional models of care. Attracting university & college students motivated to provide companionship to older people.

The programme sought to test what works and what the challenges are in developing a sustainable Homeshare scheme in order to identify factors which could be used by commissioners in determining which types of Homeshare scheme to fund or otherwise support in the future. The HSP has been commissioned during a time of change within the housing and social care policy environment, with an increased movement towards providing personalised support and supporting individuals to remain within their own homes. Learning from the HSP is intended to support developments within the Homeshare sector, but also offers wider learning in delivering personalised support.

The HSP was initiated in June 2015 to run to December 2017 with different funding timeframes for each site, and this report presents findings from the programme to the end of this period. In June 2017, Click Nottingham chose to leave the programme, due to a change of staff and lack of traction with local partners so this report draws on the formative scoping and interim evaluation work with Click Nottingham but excludes data from the site.

1.1.2. The HSP partnership

Led by **LBF** and **BLF**, the HSP provided a support offer as part of the programme approach, presented overleaf:

Age UK
 Managing the work plan; providing direct support to sites and engaging with prospective householders to provide a channel for older people's voices and experiences

The Foyer Federation
 Engaging with prospective homesharers to provide a channel for their voices and experiences

Shared Lives Plus
 Providing guidance and practical best practice support from the wider Homeshare sector. Funded for 2 years beyond the HSP to support HSP sites and wider sector.

Social Care Institute for Excellence (SCIE)
 Managing, commissioning and quality assuring the evaluation and providing social care sector policy knowledge, expertise and reach

This included a number of practical resources:

- Financial modelling tool developed by LBF
- Business mentoring and marketing support provided through LBF
- Quality Assurance Framework (QAF) developed by Shared Lives Plus
- Online policy and practice development resources developed by Shared Lives Plus
- Dedicated website and information sharing hub managed by Shared Lives Plus which allows interested householders and homesharers to be referred to Homeshare schemes.

1.1.3. HSP Governance

Figure 1 – HSP Governance structure



The HSP had a structure for governance and reporting which includes the Programme Partnership Board, Communications Group and Programme Delivery Group, outlined in Figure 1, left.

The HSP Delivery Group co-ordinates contact and activity between schemes and partners, escalates emerging key issues to the Board and co-ordinates the activities of the Communications Group and Policy Group.

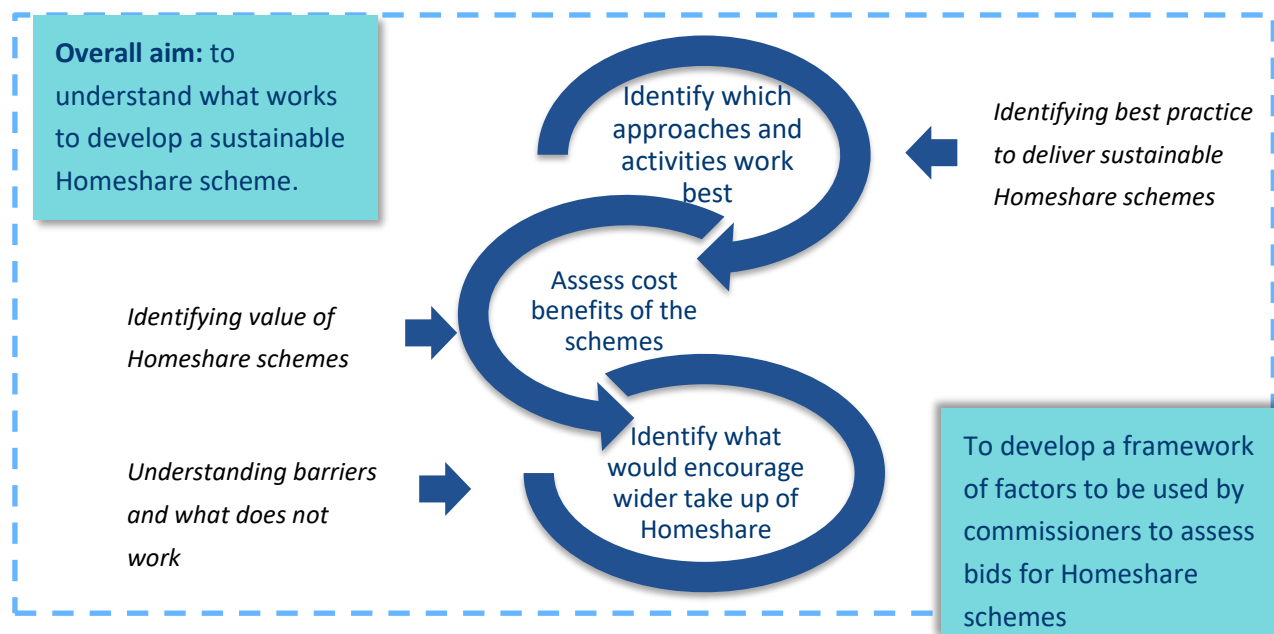
1.2. The evaluation approach

Traverse, working with Aleron, was selected by the HSP partnership to undertake an independent evaluation of the HSP, with a focus on formative learning throughout the implementation of the HSP to help shape its design and to support HSP sites performance.

1.2.1. Aims and objectives of the evaluation

The aims and objectives of the evaluation are presented in Figure 2, overleaf.

Figure 2: Aims and objectives of the evaluation



1.2.2. Underpinning principles for the evaluation

The evaluation approach struck a balance between maintaining independence and of supporting dynamic improvement, aiming to make the most of the learning at key stages of the programme to support the pilot schemes in their development. This approach included principles of:

- Learning partner role:** Involvement and engagement of Traverse as key contributors to ongoing processes for learning and development.
- Co-production:** with HSP sites, identifying, accounting for and explaining the links between context (policies and demographics), strategies, processes, inputs, outputs and any impacts and outcomes.
- Capacity building:** Support for local monitoring and self-evaluation which supports sustainability, engagement and develops local ownership.
- Collaboration:** Minimising burdens and duplications for the HSP sites through maximising use of secondary data sources where possible
- Realist approach:** presenting findings from each of the HSP sites in relation to local contextual factors

1.2.3. Evaluation design

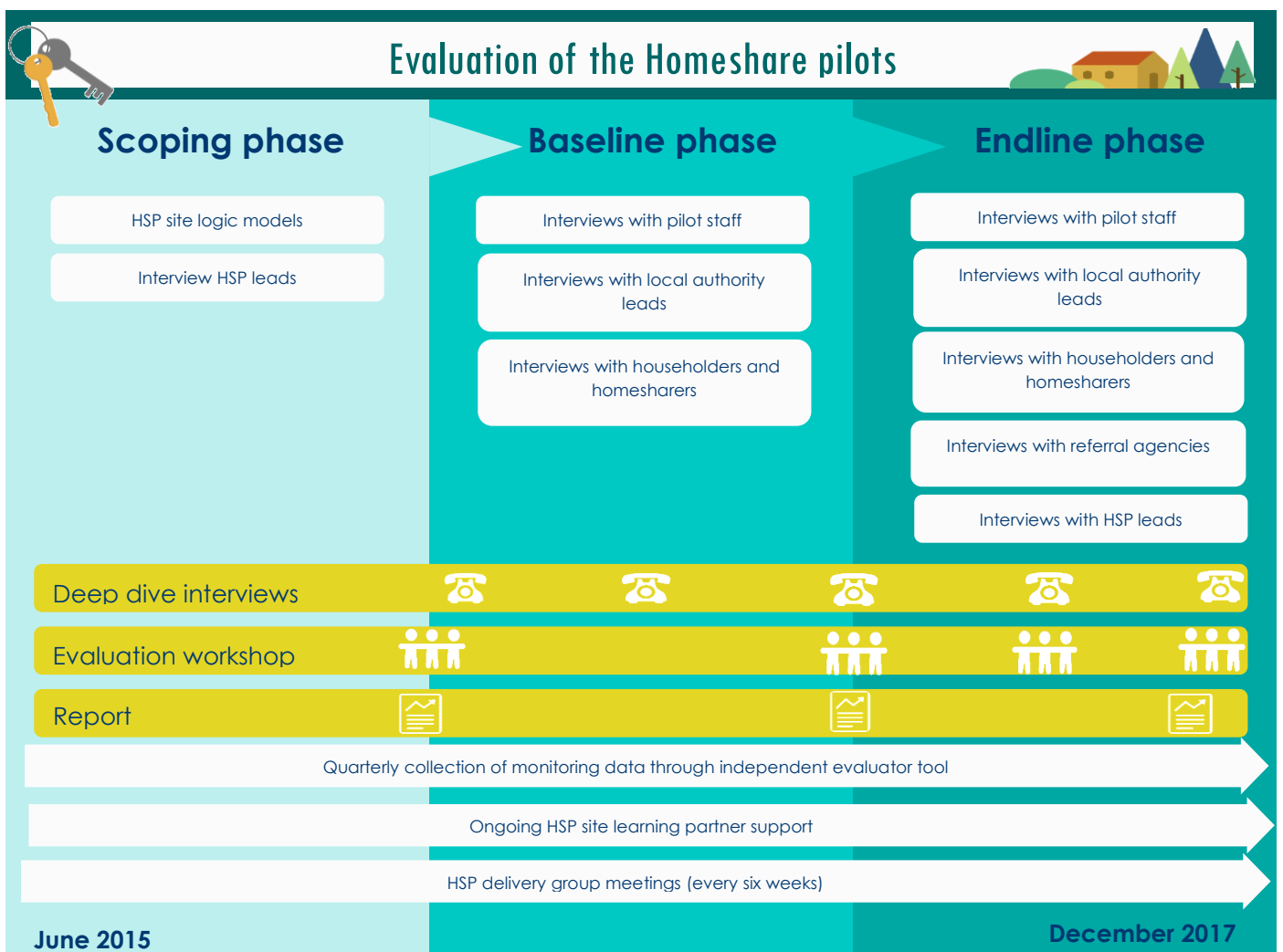
The process evaluation design for the HSP sought to identify, explore and explain impact and outcomes (for all participants and at all levels) and to account for change over time, through use of a mixed method approach which included:

- Secondary analysis of quantitative national and local data sets as an important element of site profiling to provide baseline contextual information for each scheme;

- Core common monitoring and evaluation data across all sites;
- Co-production with sites of an independent evaluator data collection tool; and
- Primary qualitative research with HSP site staff, householders, homesharers and local stakeholders (including local authorities and referral agency stakeholders) to explore evaluation lines of enquiry where information could not be obtained from other sources.

The evaluation methodology (presented in Figure 3, below) has varied during the HSP, to account for programme and HSP site changes during the HSP. A detailed summary of the evaluation methodology is presented in **Appendix A** in the separate Technical Appendix.

Figure 3 – The evaluation methodology



1.3 Structure of this report

This report presents learning from across HSP sites in the following sections:

- **Section 2:** Experiences of living in a Homeshare
- **Section 3:** Operating a sustainable Homeshare scheme
- **Section 4:** Referring individuals to a Homeshare
- **Section 5:** Sustainability and legacy

- **Section 6:** Conclusions

The report has two key audiences of HSP partners and the HSP sites but intends to generate learning for the wider Homeshare sector. It also includes broader transferable learning in relation to current health, housing and social care policy context and focus on person-centred and self-directed care. There is further transferable learning from the programme on using co-production approaches to deliver a national programme which is shaped by and responsive to local needs and context. Each section in this report has therefore been structured to provide summaries and standalone sections to support each audience in reading this report.

This report is intended to be read alongside the separate **Technical Appendix** detailing the evaluation methodology, case studies and quantitative analysis.

2. Experiences of living in a Homeshare

This chapter provides reflections from matched householder and homesharers on their experiences of living in a Homeshare, on the support they have received, and their perception of what works in creating a successful Homeshare partnership. This section also considers the economic impact of being matched by using indicative data on cost avoidance.

2.1. Enquiries about Homesharing

HSP sites have been successful in generating a range of enquiries into Homesharing, although varied in the volume of enquiries, from 11 to 468 enquiries received as of October 2017. Data collected on enquiries, recorded within the independent evaluator tool, identified characteristics of the householder and homesharer market:

- **Age:** the average age of all homesharers was 34.1 years, and the average age of householders which was 78.5.
- **Gender:** the majority of both householders (75%) and homesharers (74%) were female.
- **Marital status:** the majority of householders and homesharers were single (76% and 86% respectively). 35% of householders were widowed.
- **Employment:** the majority of householders were retired (89%) and the majority of homesharers were in employment (74%)

Further analysis of enquiries data is presented in the accompanying Technical Appendix to this report.

2.2. HSP site progress in achieving matches

HSP sites have differed in the time taken to generate matches over the course of the programme. By October 2017, three HSP sites had generated matches and no other HSP sites had achieved matches by this same date. Updated figures for number of matches achieved by December 2017 are presented in the Addendum of this report.

Across all HSP sites, numbers of matches had fallen behind their previously anticipated estimates for number of matches to be achieved. HSP sites have faced delays in achieving matches due to a longer than anticipated time taken to establish a steady supply of referrals, receiving referrals with needs too complex to be supported by Homeshare and limited housing available with spare bedrooms suitable for homesharing. Data presented in Table 6 overleaf summarises data collected by Age UK as part of programme monitoring and through the independent data evaluator tool. Full analysis of this data is presented in the separate Technical Appendix report (Appendix C). Some HSP sites have experienced difficulties in using the independent evaluator tool, and have varied in how they have defined enquiries, and so figures may be underreported and thus provide unreliable comparisons.

Table 6: HSP site progress in achieving enquiries and matches as of 7th October 2017

Pilot	Enquiries	Applications	Approvals	Matches ⁶
Edinburgh Development Group	30	2	-	-
Age UK IOW	38	15	6	-
Knowsley Housing Trust & PSS	48	16	2	-
Novus	468	366	87	18
Age UK Oxfordshire	11	10	11	4
PossAbilities	50	43	29	4
Click Nottingham	23	4	-	-
Leeds	77	46	7	-
Grand Total	745	502	142	26

HSP sites have experienced an increase in enquiries in line with the reported wider network increases in enquiries (up from 51 enquiries through the Homeshare UK website between December 2015 and March 2016, up to 465 enquiries between December 2016 and March 2017).⁷

2.2.1. Research with matched householders and homesharers

Traverse conducted research with 12 householders and homesharers who had been matched (referred to as ‘matches’ hereafter) and two single individuals from matches (26 interviews in total) from three HSP sites which had made matches (Age UK Oxfordshire, PossAbilities and Novus). Of individuals interviewed, 19 were female and 7 were male. The average age of householders was 81 and homesharers was 34. There was some variation in matches interviewed at endline:

- New matches made between baseline and endline interviews (Age UK Oxfordshire, Novus, PossAbilities)
- Matches had also ended in some HSP sites (PossAbilities, Novus)

⁶ Note that matches recorded in the table are cumulative and presented over the course of the HSP. The matches column represents all individuals who were identified in the table as being ‘matched’, including those where a new match was formed after a homesharer left a match or a householder exited support.

⁷ Data from Homeshare UK website hosted by Shared Lives Plus.

- For two matches interviewed at baseline, family members were interviewed rather than the householder (Age UK Oxfordshire, PossAbilities)⁸

Of those interviewed at the endline, eight householders and seven homesharers had previously been included within the baseline reporting.

2.3. Awareness of Homeshare



Fiona is an older householder living in London, who has previously suffered with depression. Novus matched her with Andrea, a female homesharer:

“I get depression, I have light box. The light box- I have my breakfast in the light it does make a difference, October to December are my worst times. Andrea has helped in that respect, it’s something to look forward to, someone coming in, just knowing she is here, movement in the house.”

Most householders heard about their local scheme from family and friends, or through seeing it in hard copy media. In one instance, the daughter of a householder saw a flyer for Homeshare in a local Age UK shop, which she then used to inform her mother. Several householders also became aware of Homeshare through local voluntary organisations that recommended the scheme to them.

Most homesharers became aware of their local HSP site via the internet, through either searching for affordable accommodation and being linked to websites such as Shared Lives and Gumtree, or through reading about the scheme in online newspapers and other sources such as the BBC, Guardian and Facebook. Other channels included hearing about Homeshare through word-of-mouth from family and attending a presentation at an organisation where they were volunteering.

2.4. Benefits of living in a Homeshare

All except one of the matches interviewed had a positive experience of Homeshare, and there were numerous examples of where the match pairing had benefited both individuals. One homesharer reported a negative experience and was looking for a new householder when interviewed (described in section 2.5.)

2.4.1. Improvement in householder wellbeing

Householders, their family and homesharers described improvements to the wellbeing of householders, such as improved mood in the case of one householder, reduction in anxiety of one householder with dementia, and confidence in their mobility in another householder. One householder also reported that her sleep had improved since the beginning of her match:

“For many years, I haven’t slept very well. I couldn’t get to sleep quickly, or I’d wake up and not go back to sleep. This has improved significantly. I don’t want to overstress it as it may or may not be to do with Martina being here, but I think it is really.” Householder, PossAbilities

One householder and his match both commented that he also wanted to do more activities:

⁸ At the time of endline reporting, one Age UK Oxfordshire householder declined to be interviewed after suffering a recent bereavement, while one homesharer left PossAbilities between the baseline and endline fieldwork.

“It’s been great – got me a bit out of my shell, and you know that if you have a problem then there’s someone there to back you and help you. They’re not there to gain anything – they’re there to help you.” Householder, PossAbilities

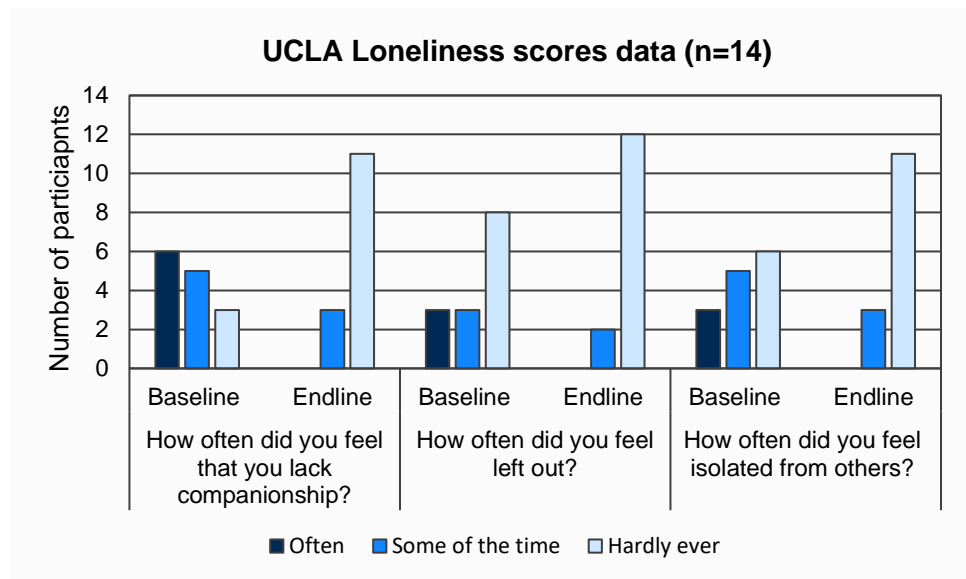
Two householders also reported increased activity as a result of going out of the house more, such as trips to town, museums and exhibitions, whilst one homesharer also reported that she was encouraging the householder to engage in everyday tasks such as walking to the post box.

2.4.2. Companionship and loneliness

Matches identified companionship as one of the main benefits of participating in Homeshare. From enquiries data held within the independent monitoring tool, 58% of householders, and 40% of homesharers had come to Homeshare for companionship.

As part of baseline and endline fieldwork, householders and homesharers were asked three questions to measure loneliness, using the UCLA loneliness scale⁹. Due to breakdown of sharing, limited number of matches being present at baseline and endline, and refusal by some householders and homesharers to answer the questions, only fourteen participants provided data on loneliness before and after homesharing, presented below. Despite the low numbers, there was an indicative reduction in perception of loneliness reported by householders (7) and homesharers (7).

Figure 4: UCLA Loneliness scale data



Householders identified the benefits of having a homesharer as simply having someone to talk to on a regular basis, reducing loneliness and isolation previously faced:

“I value the company the most, because I was on my own, had no one to talk to and you get bored when you’re on your own. Now that I’ve got Lauren [homesharer], I’ve got someone to talk to.” Householder, PossAbilities

⁹ UCLA Loneliness scale: <https://www.campaigntoendloneliness.org/wp-content/uploads/Loneliness-Measurement-Guidance1.pdf>

Other than providing company, there were also examples of matches watching television or films together and playing games (such as puzzles). A householder and homesharer from different matches spoke of how the presence of the homesharer provided a connection to the wider world, invigorating the house through having friends over or bringing home new discussion topics or stories from college.

Several homesharers identified companionship as one of the benefits of being involved in Homeshare, noting how they enjoyed and valued the company of their householder, something which they would not get in other forms of shared accommodation:

“It’s been so interesting and enjoyable full stop, her company and intellect is great [and] her family is lovely” Homesharer, Novus

Some matches felt that their relationship had gone beyond providing ten hours of support and developed into a friendship, where they did not feel the need to monitor support. There were two examples of homesharers staying in touch with householders after they had moved out.

2.4.3. Support around the home

The majority of householders spoke of the value in receiving assistance around the home with tasks such as cooking, cleaning, shopping and gardening. This provided support with tasks that householders found difficult due to physical mobility issues such as carrying shopping bags or cleaning the bath:

“She makes the meals. Yesterday she vacuumed the house, then she did the dusting and mopped the floor... I still cook and clean, but I don’t have to do it all the time. I can’t mop, because you have to use both hands to squeeze it out. It’s easier sharing everything, a lot easier.” Householder, PossAbilities

In matches where householders had multiple needs or higher levels of dependency, homesharers described how they also provided an additional layer of support through directly assisting family carers and providing updates to professional care staff. These householders’ family members also felt that the presence of a homesharer acted as an extra pair of eyes or ears in case anything happened in the house.

2.4.4. Low-cost accommodation

Homesharers identified Homeshare as an affordable source of accommodation. Homesharers paid between £125 and £200 per month, compared to householders who paid between £50 and £130 for participating in the scheme. Homesharers in London and Oxford in particular considered the fees to be significantly more affordable than private rental prices which are higher than average. Householders were also aware that this was a key benefit for homesharers.

“For me, there are mainly the practical benefits of affordable living and independence in the city, which is a huge thing for me. I don’t think I could have afforded to live here and do the occupations I’m doing without Homeshare” Homesharer, Novus

Beyond this lower monthly cost, Homeshare was considered to offer good value, allowing homesharers to live in larger rooms and better located properties than they would otherwise be able to afford in the rest of the housing market. This allowed homesharers to save money to support tuition fees, or for future expenses such as a house deposit.

2.3.5. Intergenerational learning

Some homesharers felt that they had gained new insights and learned new skills while living with their householder. For example, homesharers found that listening to householders' stories had given them a new perspective on older people. For some, this benefit went beyond the anticipated benefits of participating in Homeshare:

"[Being in a Homeshare] made me appreciate older people are under-valued and underrated in society, [it] made me realise how much they have to offer people"
Homesharer, Novus

Householders had also helped homesharers in their developing their own skills. This included culinary skills and, where homesharers had come from abroad, helping them to practice their spoken English.

"We talk a lot and that's one of the things that I really like. This helps me to improve my English. [She] supports me by cooking for me and also helps me practice my English" Homesharer, PossAbilities

In addition, a couple of homesharers had provided their householders help with using IT such as mobile phones, laptops and tablets. This had increased the ability for householders to participate in day to day life, such as through use of online shopping.

2.5. Match enablers

Where matches were working well, householders and homesharers highlighted four key factors that enabled a successful match.

2.5.1. HSP site support

The majority of matches were extremely positive about the support that they had received from their local Homeshare scheme. Both householders and homesharers valued schemes monitoring match progress and being easily contactable to respond to any issues raised.

"I always feel as if I have backup, so if you feel worried about something you can phone up independently and ask, 'what about this?', 'Am I doing the right thing?', or 'should I do this or not do this?'" Householder, Age UK Oxfordshire

Only one householder felt that their local scheme should have contacted them more and had more regular catch ups.

Matches also considered that Homeshare staff had gone above and beyond their perceived duties to help, such as Age UK Oxfordshire sending a householder's daughter regular updates as she lived abroad, and three instances where PossAbilities had met homesharers arriving



Out of hours support: The day after arriving in the UK, one of PossAbilities' homesharers went for an afternoon walk but got lost after her phone ran out of battery. When she hadn't returned by evening, the Householder rang the out-of-hours team, who then alerted the PossAbilities Coordinator. The Coordinator immediately contacted the Householder to offer support just as the Homesharer had found her way home.

from abroad at the airport. PossAbilities also gathered together a group of homesharers and householders to celebrate a householder's birthday. The homesharer was also feeling lonely at the time and commented that this "helped with the social isolation – for both of us" and was described by the householder's daughter as having "a real family feel".

There were only two examples where householders and homesharers felt that more support could have been provided. For example, one homesharer felt that she should have been provided with more information about her householder, her level of need and her property before arriving from abroad.

2.5.2. Maintaining personal space

Matches identified the importance of finding the right balance between spending time together and apart. Matches living in larger properties reflected on how having separate bathrooms, or even living on separate floors, enabled them to maintain a sense of independence and privacy. Similarly, when it came to personal time, most homesharers felt free to go out when they wanted for their own social activities, but underlined the importance of informing their householder in advance to avoid them becoming concerned:

"I'm fortunate that I have more personal space than other homesharers may have in other houses. That is probably one of things that helps us a lot, because we have that personal space, so [she] can use things when she likes and so can I"
Homesharer, Age UK Oxfordshire

Several homesharers also highlighted the importance of having guests to stay with them, as this meant that they didn't have to always travel to see partners and family.

2.5.3. Open communication within the match

Multiple matches felt that open, honest communication underpinned a successful homesharing relationship, especially during the first few weeks of a match.

"For the first three weeks, it is about asking [questions], trying to understand each other, trying to live together and obviously [trying] to talk. The best thing if you have an issue or problem is to talk... if you don't speak with that person, they'll be problems." Homesharer, PossAbilities

Definition of open and honest communication differed between matches. For example, one match at PossAbilities highlighted how they had written down and discussed a list of house responsibilities together, whereas another homesharer at Novus spoke of how their householder had no rules but would advise them if they need to change their behaviour (such as reducing noise).

2.5.4. Organising regular activities together

Several householders and homesharers also highlighted the benefits of having shared activities that they undertook on a regular basis, such as cooking, sharing meals or watching television as a means of formalising the activity undertaken as part of the ten hours of support.



Communication: Wilma is a householder in Oxford who has one homesharer and a lodger:

"She wanted to Hoover at the hall at 8:15am on a Saturday, so I did say no. She likes everything early you see, but we have other girls in the house and one of them was out clubbing the night before so I didn't want Sofia to wake her up. That was the only thing I had to say – she didn't really like it, but she agreed."

“Every Sunday night at 7:30pm we watch a video... I choose one and then she chooses one. We enjoy watching them together and it gives us a chance to spend time together. It’s nice to have our time and watch the film, but chat as well”
Householder, Age UK Oxfordshire

These activities provided householders and homesharers with an easy opportunity to spend time together, and also stimulated conversations.

2.6. Challenges of living in a Homeshare

Matches identified four challenges faced during their matches:

2.6.1. Sharing space

Householders, especially those who had been widowed, experienced difficulties in adjusting to the routine of another person at the beginning of a match. Similarly, some homesharers also identified issues around accommodating different lifestyle preferences such as diet and the timing of meals. For homesharers, challenges around sharing space also related to providing formal support within a familial environment, which often led to unexpected constraints on their personal time when householders made short-notice requests.

“The expectation management, I feel like a family member and can’t really close the door. I feel obliged to come and help, even if I’m not working or if I’ve done my allocated hours.” – Homesharer, Novus



Jemima is a homesharer living in London. Novus matched her with a householder whose family live nearby:

“Having a meal at his daughter’s – this is very challenging – I’m not used to having such long meals, they have dinner from 7.30 to 10pm and it’s hard to leave. I am not really engaged in conversation, I sit there and don’t say much, it’s something I have no clue about. I want to be polite and then I also have to go back home with Harry. We are all different, but I don’t enjoy it.”

2.6.2. Increasing need during the match

There were three examples of where homesharers felt obliged to provide more than their ten hours of support. In most cases, but not all, this occurred within matches where the householder had a higher level of need or where the needs of a householder escalated over the life of the match. One homesharer, living with a householder with early onset dementia had faced difficulties in providing support:

“Her mood in general is not doing well. It’s difficult, because on one side I want to make sure she has as much dignity as possible, but I also have to think about myself in terms of how much support I’m providing and the extent to which she remembers the anxious times.” Homesharer, PossAbilities

In this example, PossAbilities had added a further homesharer to the match, as the original homesharer was feeling increasingly lonely with the escalating needs of her householder.

2.6.3. Timing of support

Some householders reported that the working or study hours of their homesharer left them alone and without help during weekdays, which also reduced the number of opportunities they had to undertake activities together.

“She worked 9am-5pm [and] it left me with nobody there from early morning and I would have no real contact with her until she came back in the evening, at which time I was tired because I’m almost 90 now.” Householder, Novus

There were also several examples of homesharers feeling too tired to undertake activities with their householder on their return from work or on their days off. The majority of homesharer enquiries were from people who worked full time. 92% of all homesharers recorded in the independent evaluator monitoring tool worked full time.

2.6.4. Directly addressing issues within the Homeshare

Several householders and homesharers also reported feeling awkward when it came to directly addressing issues within their Homeshare. This included asking homesharers to complete certain tasks as part of their agreement such as cleaning and enforcing house rules, as well as awkwardness for both parties around completing a log of support, where pilot sites required this to be completed.

“When I started [Age UK Oxfordshire] were set on us filling in logs, which can feel awkward and a bit like homework, but, once we got used to it, it was useful because I can monitor how much time I’ve spent with her and I don’t feel guilty” – Homesharer, Age UK Oxfordshire

Homesharers experienced a range of other issues within the house, including one example where a householder repeatedly refused to wear a personal alarm for her severe asthma, and another where a homesharer was asked to contribute additional money towards the cost of a Christmas meal.

Some homesharers also reported feeling uncertainty around the end date of a match, often within matches where the householders’ needs escalated over the course of the match. Where householder need had escalated, homesharers had raised the issue with HSP sites, and looked to be re-matched in another Homeshare.

2.7. Costs avoided by health and social care services

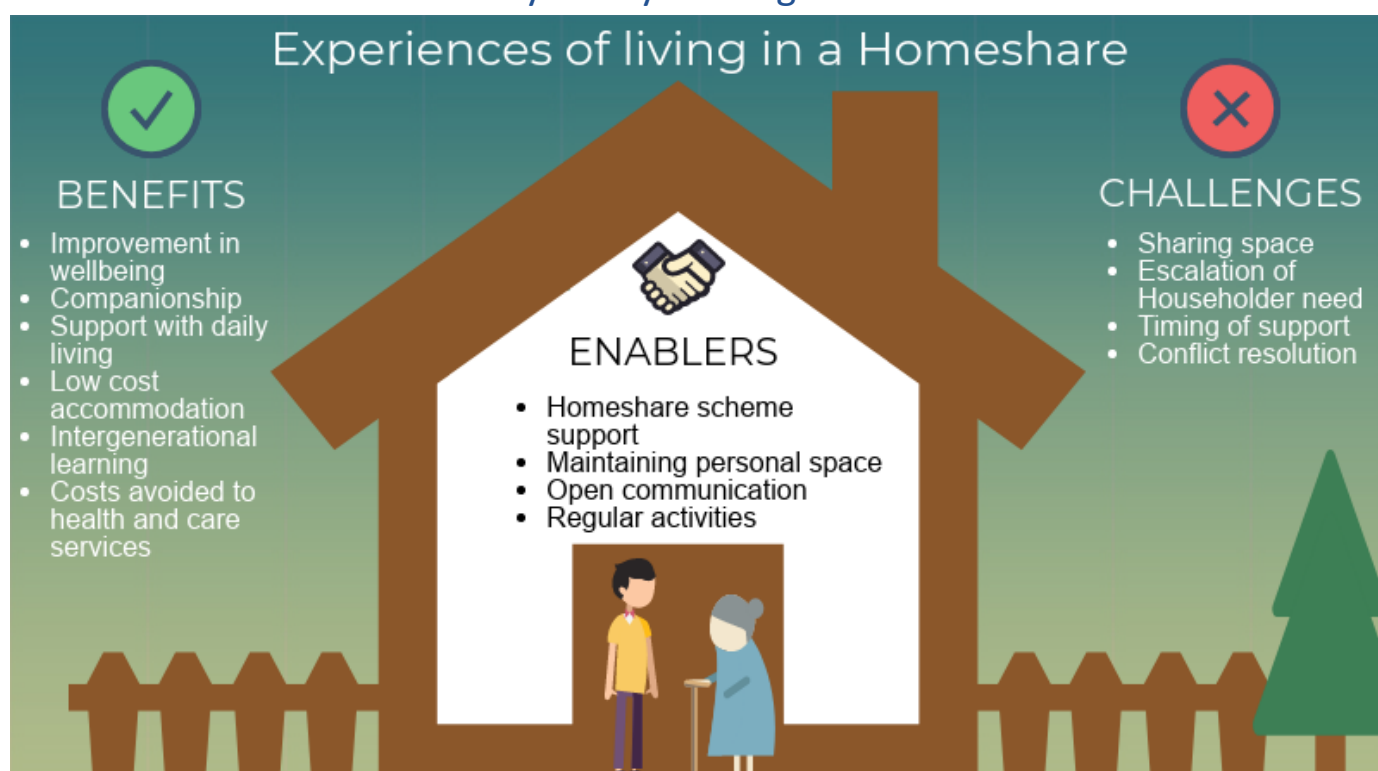
While the findings illustrate the individual and social value of Homesharing, for many of the benefits identified there is also a wider economic benefit to the local health and care economy, through reduced requirement for health and social care services afforded through Homesharing. As an economic concept, this is termed as cost avoidance - those costs potentially not incurred by statutory services as a result of Homesharing. The following table (Table 7, overleaf) presents likely costs avoided through Homesharing identified from interviews with householders and homesharers which relate to differential service use. The approach used has been to identify existing support received through Homeshare, and to consider the most comparable alternative source of support available from health and care services. Estimated costs have been calculated on the likely use of a service over the course of

a nine month match (the average length of a Homeshare match¹⁰). Due to the limited number of matches achieved, these costs have not been aggregated across matches and are presented as unit costs. The table is presented in full in **Appendix C** (in the accompanying technical appendices).

Table 7: Costs avoided through Homesharing

Indicator	Costs avoided during a match ¹¹
Reduced use of Accident and Emergency (A&E) (no subsequent hospital admission)	£119
Reduced hospital admissions (any reason)	£1,590
Reduced use of respite day services – help with household tasks	£12,840
Reduced use of mental health services	£674
Reduced use of patient transport services	£119
Help with Household tasks - Gardening	£52
Help with Household tasks - Cooking meals	£1,638
Help with Household tasks - Cleaning	£1,606
Befriending	£1,560

2.8. Summary of key messages



¹⁰ Reported within *The State of the Sector Report* (2016), Shared Lives Plus.

¹¹ A match is assumed as 9 months for the basis of calculations.

3. Operating a sustainable Homeshare scheme

This chapter describes the key process learning from HSP sites in what works and doesn't work in developing a Homeshare site and presents an overview of the financial viability of HSP sites.

3.1. Key factors for a sustainable Homeshare site

The insights in this chapter have been brought together from baseline and endline interviews with strategic and operational leads in each of the HSP sites and summarise key learning on what works to set up a Homeshare site, generate enquiries, achieve matches and engage partners. HSP sites identified a number of key learning practices that worked well to allow HSP sites to set up effective operating processes for their localised Homeshare schemes. HSP sites commenced operations at different times, with HSP sites funded by Lloyds Bank Foundation for England and Wales (Novus and Age UK Oxfordshire) appointed first, approximately one year before the other six HSP sites, which were funded by the Big Lottery Fund.

3.1.1. Set up and ongoing management of a Homeshare scheme

Policy and process design



Policy development

In addition to policy and process documents, Leeds City Council also developed a set of case examples to exemplify how policies and processes have been applied in practice and to aid staff who are making decisions on a case-by-case basis.

Seven of the eight HSP sites invested resource into writing policies (such as safeguarding and privacy policies) and designing operating processes, which took up to six months. Five of the HSP sites (with the exception of PossAbilities, and Novus whose policy and process was already established) chose to do so before going to market to recruit participants, to allow sites to speak with credibility to potential participants about the project's aims and profile of applicants prior to marketing externally.

Four HSP sites invited input on their draft policies from relevant internal teams, such as a legal team or senior team members (PossAbilities, Leeds City Council, Age UK IOW, Knowsley Housing Trust and PSS). If this support was not available in-house, HSP sites sought support on shaping policies from local authority teams or advisors appointed to a project specific advisory committee (Age UK IOW; Knowsley Housing Trust and PSS).

Existing within a larger complementary organisation

Five HSP sites (Knowsley Housing Trust and PSS; Age UK IOW; Leeds City Council; Novus) identified the value of working in an established organisation, which provided benefits of:

- Sourcing advice and referrals from complementary teams within their organisation.
- Drawing on existing relationships held by colleagues, managers or other internal teams to open conversations with potential partner or referral organisations.

Knowsley Housing Trust and PSS used internal marketing team for assistance with materials and gained access to PSS (Person Shaped Support - a social support and care service) revenue,

safeguarding, housing and data protection teams which are set-up to serve vulnerable groups in society. In Leeds, the HSP site is based in the Shared Lives team which has provided social care advice on referrals and utilised support from the benefits advice team to understand impact of Homeshare on personal finances. This trend is reflected in the wider Homeshare sector, where Shared Lives Plus report 73% of schemes report delivering either 'complementary' and/or 'other' services in addition to Homeshare, which include; Shared Lives, domiciliary care, community based social activity, development, training and consultancy services.¹²

Establishing an advisory group

“Our advisory group was the greatest source of help”

HSP site operational lead

Three HSP sites (Age UK IOW, Knowsley Housing Trust and PSS, Leeds City Council) established advisory groups specific to their Homeshare scheme that were made up of stakeholders including local authority representatives from housing and adult social care, partner organisations, and representatives of target demographics. This was valuable in:

- Connecting the HSP site with a broader network of relevant stakeholders to introduce the Homeshare scheme, seek partnership opportunities or advice;
- Providing advice on how to resolve challenges such as potential changes to participants' benefits as a result of becoming a householder or homesharer; and
- Aligning scheme priorities with stakeholder interests and alleviating concerns.

HSP sites reflected that skills needed to deliver a Homeshare project included project management, financial planning, marketing, relationship building, dispute resolution and policy development, and where project teams lacked these they drew on the skills of advisory groups to supplement their expertise.

Flexibility in approach

All HSP sites have adapted their approaches over time, to respond to changes in householder and homesharer markets (such as variation in benefits and support) or through learning from unsuccessful approaches. The ability to work flexibly in order to test, change and develop, and in particular the ability to adapt the development of approaches to reconsider geographic coverage and the detail of the service offer, has helped HSP sites to achieve matches (PossAbilities, Novus and Age UK Oxfordshire). Remaining HSP sites experienced less flexibility caused by the need for changes to be approved by HSP funders or internal sign off procedures. HSP sites have flexed approaches through:

- Broadening target householder and homesharer groups (Age UK IOW; Edinburgh Development Group; Knowsley Housing Trust and PSS; Leeds City Council; PossAbilities);
- Marketing techniques and strategies (identified across all HSP sites); and

¹² State of the Sector 2017, Shared Lives Plus.

- The geographic area from which they recruit participants (Age UK Oxfordshire; Knowsley Housing Trust and PSS; PossAbilities).

For example, Edinburgh Development Group originally intended to match young people with learning disabilities as householders with students as a homesharer group. A lack of interest and uptake from young people with learning disabilities, combined with local research identifying the need for a service like Homeshare in the older demographic in the area led Edinburgh Development Group to extend their target householder group. This decision was challenging, as the scheme belongs to an organisation that works specifically with younger people with learning disabilities and has no previous experience of working with older people.

Some circumstances limiting HSP site flexibility were beyond the control of the HSP site. Knowsley Housing Trust and PSS faced difficulties establishing matches due to a lack of single householders with large family houses suitable for sharing; householder distrust of non-working potential homesharers and receipt of 12 inappropriate referrals for homesharers with needs that were too complex to be supported through Homeshare. This led to Knowsley Housing Trust and PSS to expand their geographical catchment beyond Knowsley Borough and to relax the criteria placed on their target householder and homesharer groups. However, this required amending their original bid contract, which took over six months.

Monitoring and evaluation

All HSP sites had undertaken some form of continued evaluation over the course of their project including:



Monitoring marketing

PossAbilities used the Gumtree website to advertise for applicants, but discontinued this approach when monitoring data showed that the conversion rate from enquiry to application was very low as website users were likely to be facing housing crisis and requiring a fast turn-around for placement, something Homeshare could not offer.

- Use of the independent evaluator data tool (to monitor referrals and matches) and Age UK programme monitoring. Three HSP sites (Age UK IOW; Knowsley Housing Trust and PSS and Novus) explicitly intend to continue using the independent evaluator tool beyond the HSP site phase.
- Funding universities to support pilot evaluation, through a local evaluation (Leeds City Council) or to develop tailored monitoring tools to understand the economic benefits of matching (Knowsley Housing Trust and PSS).
- Internal reflection on their practice and process, through internal meetings with colleagues and managers (PossAbilities; Edinburgh Development Group; Leeds City Council) and through reflective conversations with the HSP evaluator (Age UK IOW; Knowsley Housing Trust and PSS, PossAbilities). Data collection allowed some HSP sites (Novus, PossAbilities) to forecast the likely numbers of enquiries, applications and matches they would make in the months ahead and were useful in determining the effectiveness of their marketing and recruitment campaigns.

Challenges and barriers in set up phase

HSP sites identified a number of challenges in the set-up phase:

- **Lack of policy templates:** Three HSP sites considered there was a lack of knowledge and inconsistency of policies used by existing Homeshare schemes (Age UK IOW; PossAbilities;



Insurance

A professional indemnity insurance provider refused to cover Age UK IOW on two aspects: theft from a householder and the possibility a homesharer may be made homeless, as the insurer could not establish an evidence based risk profile of these events. Age UK Oxfordshire also faced similar challenges.

Edinburgh Development Group). HSP sites considered templates should be made available across sites from a provider such as Shared Lives Plus.

- **Organisational process:** HSP sites in larger organisations had to adhere to organisational process which HSP site leads felt could cause delays. Age UK IOW faced delays to establishing operations due to the need for the scheme to use the organisation-wide Age UK IOW safeguarding policy instead of writing its own. The new policy faced delays in consultation and approval with senior management and Trustees; a process that took over six months.
- **Exit of Click Nottingham:** Click Nottingham faced challenges in achieving matches and chose to leave the programme due to limited referrals from other agencies, and concerns over reputational risk to the wider organisation. However, PossAbilities were able to support some of the individuals who enquired about participating in Homeshare in Nottingham following an increase in their funding from the BIG Lottery Fund.

3.1.2. Generating enquiries from potential applicants

HSP sites reflected that two local context variables have been critical in generating enquiries:

- Areas with a ready supply of people seeking out lower costs or alternative housing options (such as UK based or international students and/or low paid professionals);
- Flexibility and ability to shift target demographics and/or marketing techniques have been more successful at generating a higher volume of enquiries from suitable candidates. (Novus, PossAbilities and Age UK Oxfordshire)

There was variation between HSP sites in sources of enquiries, which are explored more fully in the accompanying Technical Appendix. However, from the independent monitoring tool

data there were no identifiable lessons generated for particular groups, due to HSP sites having specific target markets. While findings cannot therefore be generalised across HSP sites as to the most appropriate markets for Homeshare, there are however a number of key lessons in what works for marketing Homeshare across HSP sites:

Segmented marketing to reach wide audiences

Five HSP sites (PossAbilities; Edinburgh Development Group; Age UK IOW; Age UK Oxfordshire; Knowsley Housing Trust and PSS) broadened their target markets and adapted their marketing approaches accordingly. For example, Edinburgh Development Group received few enquiries when their recruitment efforts targeted householders with learning disabilities and have since broadened their marketing approach including targeting older householders.



Marketing

Innovative marketing approaches deployed by HSP sites included inviting local stakeholders to ride a steam train as the 'Homeshare Express'; use of materials such as bags, pens, gloves, sweets, trolley coins; local and national radio and television appearances; a campaign on the side of buses; and targeted leaflet drops in locations identified by Public Health teams

Raising awareness was critical to stimulate local demand for Homeshare as ‘word of mouth’ (which accounted for 26% of householder enquiries)¹³ was consistently reported method of hearing about the Homeshare scheme among enquirers. Some HSP sites directly marketed to family members, such as PossAbilities whose target householder demographic began as older women but shifted to include any person capable of housing a homesharer and facing the possibility of social isolation. Conversely, Knowsley Housing Trust and PSS reported family members were more often a barrier to a householder enquiry progressing to application as family members tended to reinforce intergenerational suspicion and a preference for professional services among potential applicants.

Monitoring marketing conversion rates and adapting messages or techniques

“Rather than a scatter gun approach, we’ve been trying something and then watching to see what comes of it. If it works, we’ll do it again.”

HSP site operational lead

Effective marketing for HSP sites was dependent on:

- Monitoring effectiveness of marketing efforts; and
- Employing a quick and adaptive response when specific methods worked well or did not yield enquiries (or suitable enquiries).

Efficacy of marketing approaches differed by HSP site. For example, PossAbilities trialled and stopped online advertising for homesharers on Gumtree.com, Leeds City Council has continued to invest resource into marketing on Spareroom.com as it has adopted a practice to identify and approve potential householders first and to advertise for a homesharer second.

In addition, HSP site leads targeting older people have identified that Homeshare requires careful messaging. PossAbilities and Knowsley Housing Trust and PSS found that older householders are deterred if Homeshare is communicated as a support offer or suggest that they are a burden to their families. Both have shifted their marketing messages to highlight mutual benefits: sharing knowledge with younger generations, companionship and building mutually beneficial relationships.

Building solid referral pathways with partner or other relevant organisations

“Professionals are really concerned that if they refer to us and something goes wrong, they will be liable.”

HSP site operational lead

HSP sites have engaged a number of organisations to establish routes of referral, including youth and other social work provider organisations; local authority adult social care teams, and university housing services or care leaver support teams. Data from the independent monitoring tool suggests 25% of all householder referrals and 5% of homesharer referrals were sourced through a local specialist service, which emphasises the importance of building relationship with local services to establish routes of referral.

HSP sites have found variation in the appropriateness of referrals. In some cases (Knowsley Housing Trust and PSS; Age UK IOW) HSP sites have received inappropriate referrals of complex needs such as young people already in housing crisis or older people who are on the verge of placement in residential care. Despite this, one site (Knowsley Housing Trust and PSS)

¹³ Data from independent monitoring tool data provided by HSP sites.

have found new, unexplored opportunities identified by referral agencies, such as supporting local refugees. HSP sites identified three key components of effective referral:

- Clear information on the support offer and who appropriate candidates are
- Mutual identification of synergies between the Homeshare model and referral agency aims
- Reassurance of referral organisations' concerns about safeguarding and liability.

Many of the HSP sites have struggled to gain solid referral pathways from social care teams based within their local authority identifying high Council workloads and risk aversion as reasons for this (Leeds City Council; Age UK IOW).

Face-to-face interactions with potential participants

HSP site leads at Knowsley Housing Trust and PSS, PossAbilities and Age UK IOW have found value in face-to-face interactions through use of stalls at local fairs or referral agency information days. This has allowed sites to build rapport and trust with potential applicants and has resulted in reported higher contact-to-enquiry conversion than marketing materials in isolation, which was important in smaller communities or amongst vulnerable populations. The same HSP sites found that presentations to large groups of people at a time, especially older people, could lead to heightened perception of risk within the group.

One HSP site (PossAbilities) has worked closely with an engaged community member who actively advocates for Homeshare among acquaintances and puts people she meets who are in need of support directly in touch with the Homeshare team.

Monitoring population trends

Two HSP sites (Leeds City Council and PossAbilities) reported identifying changes in the population which had led to them revising householder and homesharer groups. In Leeds, in response to difficulties faced in recruiting individuals living within council houses, the HSP site decided to change direction and focus on Headingley, a more affluent area within Leeds which also has a large student population.

In PossAbilities, the original target householder demographic of women over 65 was considered to be over-engaged, where most routes to contact the individuals (such as coffee mornings) had already been used. On visiting the local hospital in the rehabilitation ward, the site identified that the majority of patients were males, which meant there was an additional viable market outside of their target older female.

3.1.3. Achieving and sustaining matches

Three HSP sites (Novus; PossAbilities; Age UK Oxfordshire) have made matches. Four HSP sites have faced significant challenges in converting enquiries into matches.

The following subsections identify what has worked well for HSP sites that have made matches.

"I think when a genuine friendship develops, it's no longer so contrived and it's a genuine relationship. The actual matching is key."

HSP site operational lead

Establishing a good rapport with both householder and homesharer



Difficulties in matching

Sites reported difficulties in matching due to: referrals of complex need individuals, applicants passing away during the application process, individuals wishing to be matched with someone of the same religion or gender, and poor quality Householder accommodation.

HSP site leads spoke of the importance of building and maintaining positive relationships and open communication with both householders and homesharers throughout the application and matching process, and once a match has been made. This ensures that sites can maintain access to the matched pair throughout the period of the match and work with both parties fairly and in a timely manner should any issues, misunderstandings or conflict occur between them in the early settling in period of a match or at any time further into a match.

Having a good relationship with Homeshare applicants also involves understanding their needs and preferences well enough to be able to match them with a person they are likely to form a successful live-in relationship with. HSP sites have used a combination of techniques to get to know people from interviews and informal conversations to asking candidates to complete a profile including details about their daily routines and lifestyle.

Responding with flexibility to individual applicants' needs and circumstances

HSP sites have reported that applicant needs can (often quickly) change, during and after the application phase due to homesharer finding an alternative housing option or deterioration in a householder's health. In cases of escalation of need, HSP sites have in some instances had to re-evaluate whether to pursue the application, or to close it. One HSP site (Knowsley Housing Trust and PSS) regularly work to create 'right fit' type matches between higher needs applicants (ensuring that safeguarding protects both parties in a potential match) or works with social work and support staff at PSS to find alternative options for people if their applications fall through. A challenge facing sites that achieve matches is when a householder needs escalate during a match, which has led to some matches ending when householders enter residential care or passed away. This may occur due to presenting dementia, other mental health concerns, a health emergency or increasing physical frailty.

Some householders have been willing, but financially unable to make a spare room suitable for a homesharer. Two sites have allocated budget to assist (Age UK IOW; PossAbilities) and others (Novus) consider working with other services or volunteers to help this happen.

One HSP site (PossAbilities) has attracted a number of international students looking for short-term accommodation during the university year or semester. They have worked to place these students with householders who are open to short-term Homeshare agreements.

Managing the expectations of householder and homesharer

Novus and Age UK Oxfordshire noted that being open with participants that the match may not work out and encouraging them to be open to other matches or alternatives worked well to ensure participants know exactly what they are going into. Novus have found it necessary to manage householders' expectations around what a homesharer can provide, such as householders wanting a car owning homesharer which a limited number of homesharers have

"Asking people who volunteer to do painting and decorating – if it is the case that the house needs a good paint or the carpet needs cleaning, we have thought about collaborating with a local charity to do that."

HSP site operational lead.

in London. During a match, Age UK Oxfordshire identified the importance of managing expectations around daily schedules through activity logs and communicating schedules.

Homeshare operational leads have found it challenging to deal with situations in which matches have resulted in conflict or misunderstanding, which was time intensive. In one match, the householder and homesharer did not get on well, due to miscommunication about the support which Homeshare could provide, leaving the homesharer undertaking a large amount of cooking and cleaning tasks, which neither part of the match communicated to the HSP site. This match ended and required diplomacy in how it was communicated to the householder and their family.

3.1.4. Engaging local partners

HSP sites have made efforts to engage partners throughout the funded period, through presenting at events or open days, identifying opportunities for the distribution of marketing materials to membership bases or networks or identifying key individuals with specific knowledge useful in overcoming challenges as they arise.

Utilising existing networks

Firstly, HSP sites approached organisations already partnered with their organisation on other projects and introducing the Homeshare model to identify known people who might be referred to Homeshare. Some sites benefited from this, but others received referrals which were not appropriate (such as Knowsley Housing Trust and PSS). HSP sites then utilised the networks within their organisations – such as those of executive, managers or other teams – to gain access to teams in potential partnership organisations. Use of existing networks provided credible introductions to local authorities and potential referral agencies.

As a second step, HSP sites drew on the networks of partner organisations to further their professional networks. One HSP site (Knowsley Housing Trust and PSS) developed a partnership with a community organisation providing services for older people in their borough that has begun speaking to its membership about Homeshare resulting in an increase in enquiries.

Addressing (potential) partner organisation concerns

Providing partners and potential partners with accurate information and updates about changes to the scheme (even to teams internal to the host organisation) was important for HSP sites in negotiating partnership arrangements as partner organisations need to understand Homeshare correctly and how it aligns with their own aims and operations. Addressing any concerns they had about the Homeshare scheme was imperative, especially in the early stages of pilot schemes or early in a new relationship; many partners' organisations had concerns about safeguarding, legal liability and the impact on their own staff workloads.

“We thought we had a really good link with the ageing well partnership, they were quite interested in Homeshare and we built up a really good relationship and all of a sudden it went cold, because they launched something else about befriending and handing on services, so I think they see us as a bit of a threat.”

HSP site operational lead

Building trusting relationships with key stakeholders

HSP sites have successfully built trust through engaging key stakeholders to brief partners of the aims and objectives of the HSP site and to invite feedback on the design. This approach ensured HSP sites raised awareness about the scheme among important stakeholders, grew their network of trusted supporters from the outset, and designed a scheme that worked within the housing and social care support context. Building partnerships took time, so engaging with potential partners as soon as possible allowed sites the time required to build relationships. Four sites (PossAbilities; Knowsley Housing Trust and PSS; Age UK IOW; Edinburgh Development Group) selected a group of key stakeholders, inviting them to be involved in a project advisory board or steering committee to formalise their involvement.

An issue faced by HSP sites has been gaining access to individuals at a decision-making level within partner organisations in order to go further than work with partners on operational matters, for example, to work at a more strategic level on campaigning or embedding Homeshare into practice across organisational structures.

Demonstrating the value of Homeshare to a partner's own aims or operations

Presenting a case to potential partners about how the Homeshare scheme would benefit their organisational aims or mission, or might assist them to solve an operational problem, was important to building successful working relationships and in gaining buy in. An example of this is where a site (Age UK Oxfordshire) is in discussions with the Human Resources department of its local NHS Trusts to build a referral pathway for new staff seeking accommodation into Homeshare as homesharers.

A challenge for some HSP sites (PossAbilities; Age UK IOW) has been when partnerships have 'gone cold' as a result of partners shifting priorities, or in some cases, establishing their own similar services such as befriending or Shared Lives.

"To be fair to our Local Authority, they have been supportive all the way along but the commissioner doesn't write strategies. Getting the people at the top involved has been an issue."

HSP site operational lead

Engaging with Local Authorities

All HSP sites have contacted the relevant teams within their local authority with varying degrees of success and have therefore taken time to consider the best way to engage local authority partners most effectively. The two HSP sites with advisory groups both engaged representatives from housing or adult social care on the advisory groups, which enabled access to certain teams and staff, however challenges remained. One of these HSP sites spoke of needing access higher up than commissioner level because commissioners don't have a high degree of influence over strategy-making and the other faced frustrations with the local authority as bureaucracy and process slowed down how quickly local authority staff implemented agreed tasks and disruption from high staff turnover.

One HSP site found working with their local authority difficult, considering that the local authority were quite rigid in their approaches and unwilling to try new means of support. However, when they extended their reach beyond their original area, they found commissioners in a neighbouring borough approached them to learn more about the pilot. This has led them to focus their attention in this neighbouring borough.

“It is a shame because people spent the first part of the pilot doing paperwork. We should have allocated the tasks better. Everyone went off and did their own version. If we had been provided with a single version we would have had more time to do the things that matter.”

HSP site operational lead

3.1.5. Accessing support from HSP partnership and other organisations

Overall, some sites felt well supported by the HSP partners and knew where to turn when they needed assistance (Novus; Edinburgh Development Group), while others felt the support could have been more targeted from the outset or better organised (PossAbilities; Age UK IOW).

Peer support from other HSP sites

HSP sites considered the support they received from one another to be invaluable. HSP sites connected through a Google group, meeting at the annual Homeshare conference; sharing progress on a monthly conference call; the northern HSP sites meeting up independently and asking each other for support on specific issues or challenges as they arose. Connecting with other HSP sites, through partnership events and independently was considered useful for:

- Sharing knowledge and best practice examples of policies and processes – especially in the early phases of setting up Homeshare schemes locally;
- Learning from experience with specific types of cases including difficult or unique cases, for example, engaging clients with dementia;
- Gaining advice or generating ideas collectively for challenges common to all sites or any issues arising where other sites may have a different perspective or skills set;
- Generating new ideas and learning from what has worked, especially in marketing to and recruiting potential participants, an issue all sites faced on a continuous basis.

Some sites (Knowsley Housing Trust and PSS; PossAbilities; Age UK IOW; Age UK Oxfordshire; Novus) commented that practice sharing among HSP sites could have been encouraged more strongly by the HSP partners from the outset of the scheme as building these relationships was ‘hard work’ in addition to the work required to establish the Homeshare locally.

Shared Lives Plus

HSP sites were positive about support provided through Shared Lives Plus, due to:

- The annual Homeshare Conference in networking and learning from others working on Homeshare schemes;
- The monthly conference call with other HSP sites and Homeshare schemes outside of the HSP – sites appreciated the space these have created for knowledge sharing around best practice and joint problem solving;
- Work on a national marketing campaign for Homeshare – although several HSP sites commented that this has come too late for their pilot phase work to benefit and that they would have benefitted from a common marketing strategy from the outset.¹⁴

¹⁴ Interviews with HSP partners identified that a national marketing campaign was originally intended to be put into place for Homeshare but was not pursued due to differences in funded HSP site delivery models and limited geographical coverage of the eight funded pilot sites.

- Bespoke support in establishing and developing approaches.

One HSP site (Knowsley Housing Trust and PSS) considered there was value in Shared Lives Plus being able to lobby national stakeholders, but felt this support had been provided too late in the development of the pilot. Another site (PossAbilities) considered Shared Lives Plus could advocate more for Homeshare to support more economically deprived groups.

Two HSP sites (Age UK IOW and PossAbilities) commented that Shared Lives Plus would have been perfectly placed to provide HSP sites with templates to assist them with the development of policies and processes that are needed by all Homeshare schemes, such as safeguarding. Three HSP sites (PossAbilities; Knowsley Housing Trust and PSS; Edinburgh Development Group) raised the issue of the cost of travel to events and workshops hosted by Shared Lives Plus in the south of the country, as this was not originally included in their budget.

Lloyds Bank – Business mentor

Two HSP sites (Age UK Oxfordshire; PossAbilities) have found the advice of the Lloyds Bank business mentor useful as they have confirmed they are on the right path. One HSP site (Novus) found the support given to the Homeshare leads by the organisation's CEO and existing advisors to be as good as that received from the Lloyds Bank business mentor. One HSP site considered their support could have been improved if the mentor knew more about Homeshare as a concept (Knowsley Housing Trust and PSS).

Three HSP sites (Age UK IOW; Edinburgh Development Group; Leeds City Council) had not received support from a Lloyds Bank business mentor although two of these sites had requested it but faced difficulties in receiving support due to a lack of a nearby Lloyds Branch (Edinburgh Development Group; Age IOW).

Lloyds Bank Foundation for England and Wales Financial Tool

Three HSP sites identified using the Lloyds Bank Foundation for England and Wales's financial planning tool. Of these sites, Novus had moved on to using in house expertise and Knowsley Housing Trust and PSS found they needed to change many of the features of the tool to make it relevant to a Homeshare context.

Four HSP sites (Age UK IOW; PossAbilities; Edinburgh Development Group; Leeds City Council) have not used the tool. One stated that this was due to not having made any matches to date and another that it was too complicated, so they developed their own tool for the same function in-house.

Age UK

All HSP sites gave positive feedback about the support they have received from Age UK which has included:

- Advice on issues of policy and practice (Age UK IOW);
- A recent announcement of £2,000 grant funding for local Age UK branches to work with the HSP sites (Age UK IOW; PossAbilities; Knowsley Housing Trust and PSS)

- The quarterly reporting from each Homeshare pilot (Knowsley Housing Trust and PSS; PossAbilities; Leeds City Council)

A challenging aspect of working with Age UK for all HSP sites that are not located within an Age UK branch has continued to be engaging with local Age UK branches in order to work together or promote Homeshare, despite the support of Age UK to encourage this co-working. Edinburgh Development Group considered Age UK is more relevant to the English context than the Scottish context.

Foyer Federation

Six HSP sites had not had direct contact with the Foyer Federation and were unclear on the support offer in relation to young people. One site has proactively contacted the Foyer Federation and arranged to meet with them to investigate options for marketing Homeshare through local Foyers (Novus). Following on from this dialogue, now that the programme has achieved a number of successful matches, Foyer Federation is taking this forward to develop a new phase of communications and engagement work targeted specifically at the youth segment, with the committed aim of informing young people about Homesharing as a positive housing option. This will be promoted within Foyer Federation's own network of members and other key players in the youth sector. This campaign beginning in early 2018 will draw on the direct accounts of young people who have successful experiences of Homesharing in videos and other materials.

Big Lottery Fund and Lloyds Bank Foundation for England and Wales

HSP sites described having little contact with the funding partners, as quarterly reporting on achievements, challenges and barriers was supported by Age UK. Two HSP sites (Knowsley Housing Trust and PSS; PossAbilities) mentioned that this was frustrating and slowed down implementing changes to the original funding agreements, including PossAbilities' take-over of the Nottingham scheme.

Traverse - learning partner improvement role

Five HSP sites appreciated the interaction they had with Traverse throughout the evaluation period; the following aspects were raised as useful:

- Regular deep dive telephone interviews (Age UK IOW; Knowsley Housing Trust and PSS; PossAbilities; Edinburgh Development Group; Leeds City Council) which allowed HSP sites to reflect and review their own practice;
- The independent monitoring tool spreadsheet to record participant data (Knowsley Housing Trust and PSS) – this tool provided a central location to collect and monitor details of enquirers and participants;
- The tailored approach to each site (Knowsley Housing Trust and PSS)
- Evaluation workshops (Edinburgh Development Group, Novus, Leeds City Council, Age UK Oxfordshire)

“Our conversations (with OPM) have been really useful. We come away from them and think more about the issues and where we need to reshape. As useful as some of the more formal stuff”

HSP site operational lead

One site (PossAbilities) would have appreciated facilitated 'learn and share' interactions with other HSP sites, such as the deep dive evaluation workshop provided by Traverse, from the beginning of the pilot scheme that may have been conducive to 'team' working across the UK.

Support sought from beyond the HSP partnership

HSP sites had also identified other sources of support and advice beyond the HSP partners to support development. This included:

- Representatives sitting on steering committees or advisory boards purpose build for the pilot (Age UK IOW; Knowsley Housing Trust and PSS);
- Existing, non-HSP Homeshare schemes in the wider network (Edinburgh Development Group, Novus, Leeds City Council);
- Staff and teams within their own organisations (all HSP sites);
- Specific teams within their local authority, including benefits and welfare, risk assessment, housing and social care (Age UK IOW; Leeds City Council; Knowsley Housing Trust and PSS);
- Relevant organisations already partnered with their host organisation (all HSP sites).

Additional support required

The extent to which each HSP site leads felt well supported differed across HSP sites and each site faced challenges that were common to all the HSP sites (such as marketing and recruiting potential participants) as well as local challenges. HSP sites identified multiple additional sources of support which would have been helpful:

- A national launch for the HSP as a whole or coordinated launch dates for pilots (PossAbilities);
- Templates or further guidance on establishing necessary policies and processes such as safeguarding (Age UK IOW; PossAbilities)
- Advice and support on marketing (Edinburgh Development Group; Novus)
- National marketing campaign to build awareness of Homeshare as a concept, including national press, TV or a famous ambassador (Novus; Leeds City Council; Edinburgh Development Group);
- Increased connection and best practice sharing with existing, non-HSP Homeshare schemes (Age UK IOW; PossAbilities; Age UK Oxfordshire);
- Improved engagement of Age UK local organisations with HSP sites (Leeds City Council).

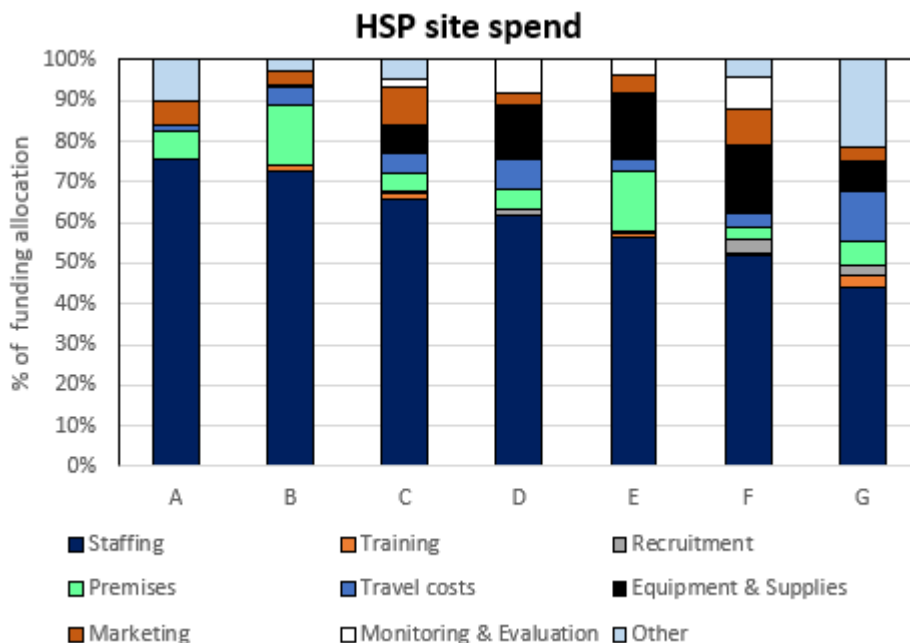
3.2. What works in financing an HSP site

3.2.1. HSP site spend

HSP sites have each received different sums, between £111,400 and £267,091 from funders. Funding has varied by the length of time projects have been funded for, the amount projects

have been funded by partner organisations and to what extent HSP sites have drawn funding from other sources (such as from within their own organisation). This section presents an economic assessment of the financial viability of HSP sites and assessment of start-up costs, through analysis of HSP site spend, and HSP site reflections on the budgeted spend to deliver Homeshare compared with the actual spend. Figure 5 below compares spend by HSP site (where HSP sites have been anonymised).

Figure 5: HSP site budget, presented as a percentage of total allocation¹⁵



3.2.2. Variation in spend by HSP sites

There was some variation within HSP site costs, which are presented in the table overleaf. Variation in spend is presented in percentage terms across HSP sites, to account for differential funding arrangements. Differences in spend collected through original bid information are examined drawing on programme data collected through Age UK on a quarterly basis¹⁶ which recorded activity, challenges and achievements of HSP sites.

¹⁵ Data has been presented for seven HSP sites, excluding Click Nottingham.

¹⁶ Programme data collected by Age UK was on activities, achievements and challenges faced on a quarterly basis.

Table 8: Range in HSP site spend % and use of spend

Budget element:	Proportion of pilot spend (%):	Cause of spend:
Staffing	44.1% - 75.7%	There was some variation in spend on staffing, due to differences in staff structure. The highest spend on staffing was Novus, who provided the highest number of staff to support the pilot.
Training	0.0% - 2.9%	Five HSP sites allocated budget for training staff, such as PossAbilities who trained staff in Dementia, Safeguarding adults, Deprivation of Liberty safeguards (DoLS) and medication, First Aid, Safeguarding Children; and Age UK IOW who trained staff in Dementia awareness training, safeguarding training, money management.
Recruitment	0.0% - 3.4%	Five HSP sites identified recruitment costs which were incurred at the start of the project but also throughout the programme, such as Knowsley Housing Trust who recruited two new delivery staff members in Jan/Mar 2017, and Leeds City Council who recruited a new co-ordinator in July-Set 2017.
Premises	2.6% - 15.5%	Both Age UK IOW and Knowsley Housing Trust changed premises over the course of the programme. A number of HSP sites had reduced premises costs through using shared office space (such as Knowsley Housing Trust, Novus and Age UK IOW)
Travel costs	1.6% - 12.6%	All HSP sites allocated budget to travel, but this differed in practice in how it was spent. PossAbilities travelled to both the Homeshare international conference in Madrid, but also visited two Homeshare schemes in France. Age UK IOW identified that travel around the island was a key issue in identifying remotely located prospective householders and homesharers.
Equipment and supplies	0.1% - 16.7%	All HSP sites allocated funding for equipment and supplies, which varied from site to site. There was variation in terms of what equipment included, such as office set up costs and phones (Edinburgh Development group) but others accounted for DBS and legal fees as part of this (Leeds City Council).
Marketing	2.9% - 9.5%	All HSP sites allocated budget to spend on marketing which varied in approaches. Some marketing support was free, such as the Just Enterprise marketing strategy (Edinburgh Development Group) or raising awareness within local media (PossAbilities, Novus)
Monitoring and evaluation	0.0% - 8.0%	Four HSP sites allocated time for local evaluation of their approaches. One HSP site, Leeds contracted Leeds Beckett university to undertake a local evaluation of the pilot, who undertook a theory of change exercise with local partners to map and develop the local approach and to use as a framework to measure progress.
Other	0.0% - 21.3%	Other costs were also budgeted for by pilots, including product development costs (PossAbilities), provision for peer group meetings (Edinburgh Development Group).

3.2.3. Reflections from HSP sites on spend

During endline fieldwork, HSP sites reviewed and reflected on their original anticipated spend and to discuss how the actual spending has varied. HSP sites identified a number of learning points:

- **Delays in achieving matches:** led to some HSP sites taking time to reconcile finances and consider when sustainability would be reached (Age UK Oxfordshire) and to have underspends due to originally allocating budget for running support training for homesharers (Edinburgh Development Group) or supporting matches (PossAbilities, Leeds City Council).
- **Increased spend was required on marketing:** due to not anticipating the range and scale of marketing activities (Knowsley Housing Trust and PSS, Novus, Edinburgh Development Group). However, PossAbilities had reduced spend on their marketing, choosing to hold back funds to see what works from other sites (such as trialling a TV advert in Leeds).
- **In kind contributions of staff:** reduced spend on senior staff originally budgeted for by drawing on experience within wider organisation (Knowsley Housing Trust and PSS, PossAbilities). Novus also had used this approach, but had taken time to communicate the role and level of support which could be drawn on from within the organisation.
- **Increased costs of networking with other HSP sites:** such as the costs of meets in the North of England, and for covering the cost of steering groups to feed staff supporting (Knowsley Housing Trust and PSS).
- **Increased cost of attending partnership events:** multiple sites had spent more than anticipated on events, such as the marketing workshops held in London. (PossAbilities, Knowsley Housing Trust and PSS, Leeds City Council). One site (PossAbilities) had also attended the Homeshare International conference in Madrid. HSP sites also acknowledged greater travel costs in increasing geographical coverage (such as PossAbilities covering Nottingham).
- **Benefit from wider value not budgeted for:** teams identified value in drawing on team members such as finance, commissioning, IT teams, or Chief Executive and other support (Knowsley Housing Trust and PSS).
- **Variation in staffing:** PossAbilities noted that perception of staffing necessary to support the pilot had varied over the course of the programme, Novus identified that going forward they intended to reduce their business development role and to train other staff for them to develop. Edinburgh Development Group increased staffing of the pilot by employing a marketing lead (2 days per week). Leeds City Council is considering increasing staffing with increased administration support to handle enquiries, and had underspent on some of the staffing of the pilot.
- **Profitability:** Novus reported reaching profitability at the time of endline fieldwork, and that the costs of the project were being met by householder and homesharer fees.

3.2.4. What works in developing a sustainable matching profile

Using the Lloyds Bank financial modelling tool, a number of projections have been generated for HSP sites using current fee structure and set up costs data to understand the number of matches which would be necessary to achieve to meet the fixed and variable costs of the HSP. The following table presents the number of matches which HSP sites would need to make and sustain to achieve financial sustainability (or to break even) for the five HSP sites which have established fee structures. Fees varied between HSP sites, where homesharers paid between £125 and £200 per month, and householders paid between £50 and £130 for participating in the scheme. Some HSP sites also charged one-off fees as part of the application process.

Table 9: Projected number of matches needed to break even over time.

Site:	No. of total matches to break even in:				
	Y1	Y2	Y3	Y4	Y5
Novus	14.4	12.5	12.3	11.9	11.6
Age UK Oxfordshire	11.0	9.6	9.6	9.4	9.0
PossAbilities	12	11.0	10.1	10.1	9.9
Leeds	12	11.1	10.4	10.3	10.2
Edinburgh Development Group	6.2	5.3	4.7	4.6	4.6

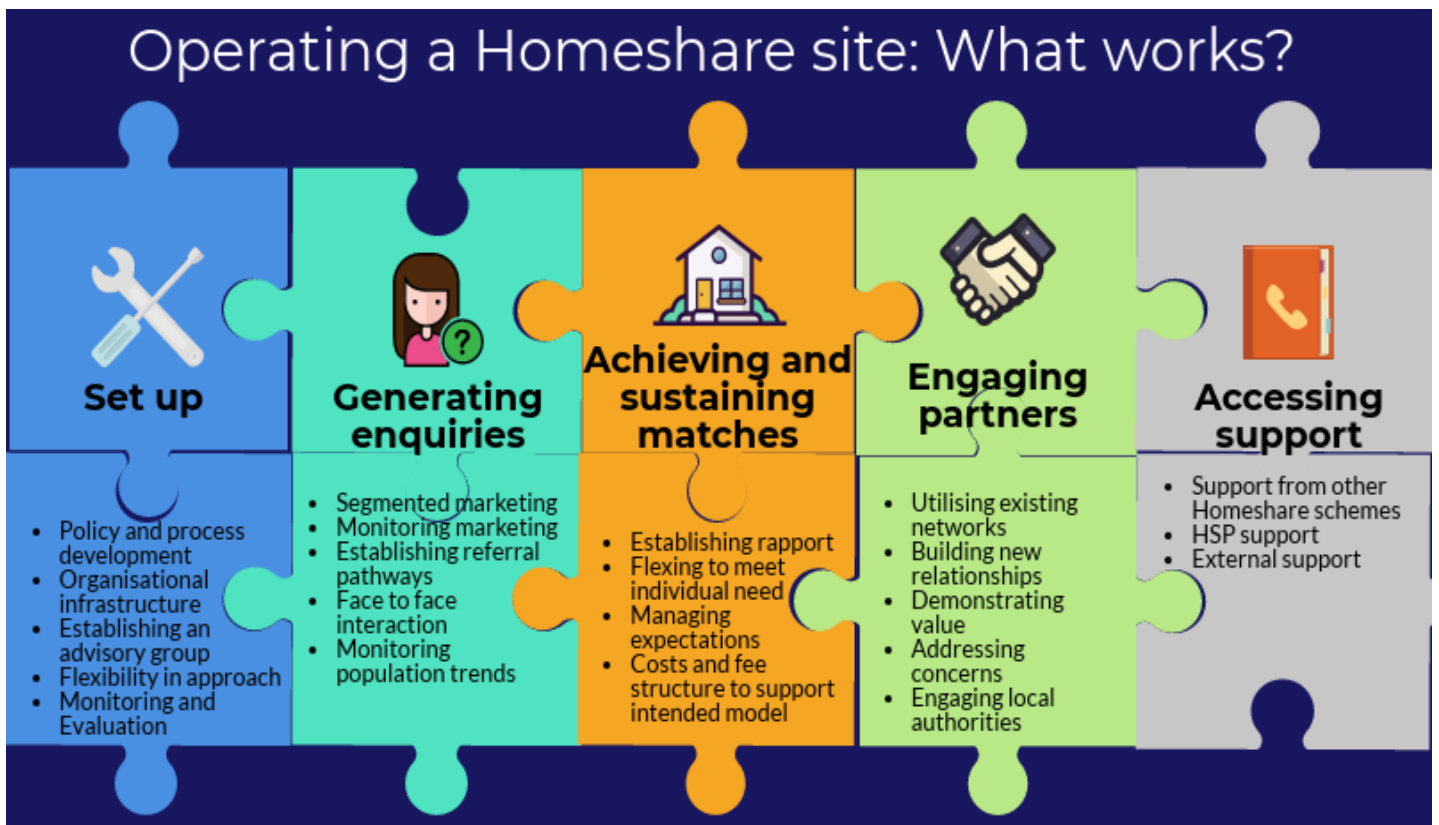
There was variation in the time taken to establish financial sustainability across HSP sites. Edinburgh Development Group needs to achieve the lowest number of matches to achieve financial sustainability, due to a smaller staff team and relatively low infrastructure costs. Comparatively, Novus has a larger staff team, marketing and infrastructure costs.

Of the three HSP sites which have made matches, Novus is the only site approaching financial sustainability (with 14 matches reported in December 2017). The data suggest that HSP sites require time to achieve financial sustainability, and the higher the upfront costs on infrastructure and staffing are, the greater the volume of matches required to achieve financial sustainability. This is in parallel with a need to not only make, but to sustain matches over the course of the funded period, to ensure a maintained income. This means that financial sustainability can be achieved through two separate scenarios:

- A high staffing and upfront investment in the pilot (for example due to operating as a new enterprise) which requires a high volume of matches to achieve sustainability. This model would work targeting less vulnerable groups in high demand areas (such as Novus)
- A low staffing and upfront investment in the pilot (for example operating within an established organisation which has significant transferrable resource and knowledge) which requires a low volume of matches to achieve sustainability. This model would work well to target more vulnerable groups in lower demand areas (such as Edinburgh Development Group).

In practice, as evidenced by HSP sites, achieved rate of matching has not aligned with the estimates for achieving financial sustainability, which implies a longer timeframe is needed before HSP sites will be able to break even. This has led some sites (such as Age UK Oxfordshire) to revisit their intended fee structure.

3.3. Summary of key messages



4. Referring individuals to Homeshare

This chapter provides insight from local authority leads in housing and adult social care on the applicability of Homeshare within local contexts. Building on the findings from the interim report, this chapter also draws on the perspective of organisations which have been engaged by Homeshare sites to establish routes of referral.

4.1. Purpose of local authority interviews

Shared Lives Plus has reported that an increasing number of local authorities have contacted them, interested in understanding more about Homeshare, so local authority perspectives from the evaluation will be particularly relevant for this audience.

At both baseline and endline, local authority (LA) leads for social care and housing were interviewed, to identify their perceptions of the opportunities and challenges of utilising Homeshare as a means of housing and social care support within the local area, in addition to understanding the extent of their relationship with HSP sites. Where possible longitudinal interviews have taken place through speaking with leads at baseline and endline, however churn in local authority staff has meant most interviews were undertaken with new leads.

During endline fieldwork, insight from LA interviews was supplemented with interviews with two referral agencies in each location with the exception of Oxfordshire where the HSP site considered interviews would not be timely. Referral agencies were identified by HSP sites as organisations which they had engaged or planned to engage to develop referral pathways.

4.2. Local authority insights

Engagement of local authority leads in social care and housing forms is an essential part of establishing a Homeshare scheme, to identify relevant markets which would benefit from additional support and to enable a route of referral to be established with local authority operational teams. As a key local partner for HSP sites, this section presents perceptions of local authority housing and social care teams.

4.2.1. Housing

Potential for Homeshare to support local housing need

Housing leads identified a number of potential opportunities for Homeshare to support housing needs of older and younger population:

- **An approach which fosters strength and resilience to support independent living:** three housing leads considered Homeshare aligned with the current emphasis on increased independence for older residents and priorities to increase extra care housing and support for living within the community. (Leeds, Knowsley, Isle of Wight)

“It’s going to help people remain in their home longer and promote personal independence for longer – which will be vital for us in terms of the extra-care perspective”

Housing lead,
Knowsley

- **Reduction of demand for private rental and social housing:** a housing lead in Knowsley felt that Homeshare supported a niche of demand for affordable housing for younger people not wishing to live in Houses of Multiple Occupation, but equally not ready to live independently. One local authority (Oxford) had previously tested Homeshare as a solution to housing needs prior to the pilot¹⁷, and in the Isle of Wight, the housing lead listed Homeshare as an option on their choice based letting website.
- **Companionship and reduction of social isolation and loneliness:** four leads identified the value for both older and younger people sharing households to reduce social isolation and mutual learning (Edinburgh, Leeds). This was echoed by leads in Barnet and Nottingham who mentioned the value of supporting isolated householders in more affluent neighbourhoods where isolation was most likely to be higher.
- **Tailored support markets:** some leads suggested applications for Homeshare including support for refugees (Nottingham) and for young people who were leaving foster placements (Knowsley), and younger people with disabilities (Isle of Wight).

Risks and challenges presented by Homeshare

Housing leads identified a number of risks and challenges associated with Homesharing:

- **Limited application for complex needs:** a number of housing leads considered that Homeshare was unable to meet housing requirements of individuals with complex needs, and this led to a lack of interest from some housing leads (Leeds, Edinburgh). In addition, there was a perception that Homesharing lacks continuity and clarity of care expectations which would be detrimental to supporting some groups with complex needs such as people with learning disabilities (Edinburgh, Barnet).
- **Safeguarding:** one local authority lead identified the risk which Homesharing presented, where vulnerable homesharers may be open to abuse in homesharing arrangements, without basic support provided through statutory inspections (Edinburgh).
- **Scepticism on intergenerational compatibility:** two housing leads considered that bringing together older and younger people to cohabit would lead to negative impacts, that both older and younger people would experience their independence being compromised through Homesharing and considered older people to be wary of younger people (Rochdale, Leeds).
- **Perceived lack of transferability outside of London:** three housing leads considered that there was less sharing of properties within their local neighbourhoods (Knowsley, Leeds and Rochdale). In addition, there was perceived to be less pressure on first time buyers to need to reduce their housing costs to save for deposits, where houses are more affordable (Knowsley).

¹⁷ Three Homeshare pilots were evaluated, including Oxfordshire in 2010 (Coffey, J. (2010) An evaluation of Homeshare Pilot Programmes in West Sussex, Oxfordshire and Wiltshire, Oxford Brookes University School of Health and Social Care). The findings of which are available on the Homeshare UK website: <https://homeshareuk.org/wp-content/uploads/2016/09/coffey-2010-evaluation.pdf>

- **Raising and maintaining frontline staff awareness:** Multiple leads considered that referrals would need to come from frontline housing staff being aware of (and reminded) to share information about Homeshare (Leeds, Rochdale). This was exacerbated by a lack of local examples to support staff awareness (Leeds) and churn in local authority staffing (noted across majority of local authorities).
- **Lack of local matches:** one housing lead identified a lack of matches to date was a limiting factor in establishing a route of referral (Isle of Wight).

4.2.2. Social Care

“We’ve become far more involved in terms of helping to support them to promote what Homeshare is and how it fits in with the island.”

Adult Social Care lead, IOW

Adult social care leads were interviewed from five local authority areas, and had identified the following roles for Homeshare in being able to support local need.

Potential for Homeshare to support local social care need

Social care leads were optimistic regarding opportunities for Homeshare to form part of their offer of support to local older people. Leads identified a number of key groups which could be supported through Homeshare:

- **Prevention:** three social care leads identified Homeshare as a preventative measure being capable of supporting low level needs, as a preventative measure to be used prior to individuals being eligible for social care support (Oxford, Leeds, and Rochdale). This role has led to one local authority (Rochdale) prevention team working closely with the HSP site, in attending events together or sharing information. Another local authority ran a workshop, within the social care transformation team in partnership with the local scheme identifying how Homeshare could meet social care needs of the population, including mapping the location of typical householders and homesharer populations (Barnet).
- **Supporting older males:** three leads recognised the role of Homeshare in being able to reduce social isolation amongst the older population (Leeds, Rochdale and Edinburgh). Within the older population older males were identified in two areas (Leeds, Edinburgh) as being particularly appropriate, as evidence shows that older males have less social connectivity than females, and this might be appropriate particularly following bereavement.
- **Supporting social care staff workforce:** Leeds, Oxford and Edinburgh also mentioned the role of Homeshare in supporting retention and recruitment of social care staff (and building sustainability in staff teams) who faced difficulty in accessing affordable housing which was a threat to continued delivery of the service, a risk which was heightened due to the uncertainty of Brexit and uncertainties regarding immigration status of non-UK staff.
- **Low cost support option:** multiple leads identified reduction in local authority budgets for adult social care (Edinburgh, Leeds) had led to increased work with the VCS sector in delivering services, as part of wider asset-based strategies to providing support. This was linked in multiple areas to increased thresholds for social care within local authorities.



Engaging social care

Following baseline fieldwork, the Adult Social Care lead in IOW contacted Age UK IOW to find out more about Homeshare. While developing a Shared Lives Plus Offer, the Adult Social Care team has involved Age UK IOW in market provider days and helped to promote the scheme as part of the wider support available

- **Provision of support for those leaving hospital and care institutions:** particularly those who were living alone and lacked support to monitor their health but did not reach the threshold for adult social care support. This issue was causing delays in discharge and the inappropriate use of residential care for people who could otherwise remain in their own homes. (London Borough of Barnet, Knowsley)
- **Support for people with early onset dementia:** in the London Borough of Barnet the local authority housing lead identified this was a key future market for Homeshare.

Risk and challenges presented by Homeshare

Key risks identified by social care leads included:

- **Escalation of householder need:** concerns were raised by two social care leads of increasing social care needs during the course of a match, which could lead to homesharers providing unregulated care to householders. (Oxford, Knowsley)
- **Time to establish referral with frontline staff:** Homeshare was perceived to take time to communicate to operational social care teams working on the ground (Leeds, Edinburgh) and that this needed to be a sustained effort, to ensure front line social care workers were able to communicate the value of Homeshare. (Nottingham, Barnet)
- **Marketing:** two social care leads (Leeds, Oxford) considered that there was more work to be done in marketing Homeshare more locally. This was particularly noted as a weakness in engaging the student population. On the Isle of Wight, following the baseline fieldwork, the social care lead contacted the local HSP site and built relationships in promoting the HSP site, through an island provider market day (see box).
- **Maintaining awareness of frontline staff:** one local authority officer noted that despite providing funding to promote Homeshare within the council, churn in staff and multiple concurrent transformation initiatives had limited the impact of awareness raising amongst frontline staff (Barnet).

4.2.3. Referral agencies

Referral agencies¹⁸ were identified by HSP sites as organisations which they had worked most closely with in establishing routes of referral, or future partners which HSP sites are looking to engage.

¹⁸ Agencies included two teams working within social housing providers; a social prescribing service; a local charity that supports young people at risk; a national advice charity for older people; a support and advice service for families caring for a learning disability and individuals with a learning disability; a Personal Care Assistant; a local Fire and Rescue Service; and a Strategic Commissioner Later life and dementia.

The potential for Homeshare to support local social care need

All referral agencies were positive about the potential for Homeshare to support local social care needs, whilst most identified an overlap between their organisational priorities and client base. Referral agency staff identified a number of opportunities for Homeshare:

- **Increased referral options:** four referral agencies explained that their local Homeshare pilot broadened the options that they could present to their clients. Three of these felt Homeshare could provide a companionship role to older clients or clients with learning disabilities, while the other felt it could support young clients' housing needs. Homeshare was felt to be a viable option for providing groups of clients who experience limited service provision with additional support, such as young carers.
- **Positive social outcomes:** referral agencies identified a wide range of benefits for householders and homesharers:



Referral partnerships

One HSP site is building a referral partnership with a local Fire and Rescue Service, which undertakes holistic fire safety checks in people's homes

"We see a lot of people who have lost a partner and live in a three bedroom house. They just want someone to talk to. Where Homeshare does work it could make a life-changing difference to somebody."

- Most agencies identified the potential for Homeshare to provide younger people with affordable housing. For example, one housing provider highlighted how moving into a fully functioning household might provide younger tenants with learning disabilities and mental health issues with a stepping stone towards taking on full independence and self-responsibility.
- Most agencies also highlighted the potential for Homeshare to provide companionship and reduce social isolation amongst older people, noting how just having someone to talk to can make a difference in people's lives.
- Several agencies highlighted benefits of a younger and older person sharing a living space, including the Strategic Commissioner for Later Life and Dementia citing the positive impacts in care homes that involve younger people.
- Several agencies highlighted how supported independence could contribute to keeping older people at home and healthy for longer, preventing the need for further care, which was felt to align local authorities' strategies. For example, a Personal Care assistant¹⁹ highlighted how she knew of a lady with dementia who had been hospitalised as a care home place wasn't available.

Despite a lack of referrals to date, almost all of the referral agencies said that they plan to continue working with the Homeshare sites, except the Strategic Commissioner for Later Life and Dementia who intends to promote the HSP site within the local voluntary sector.

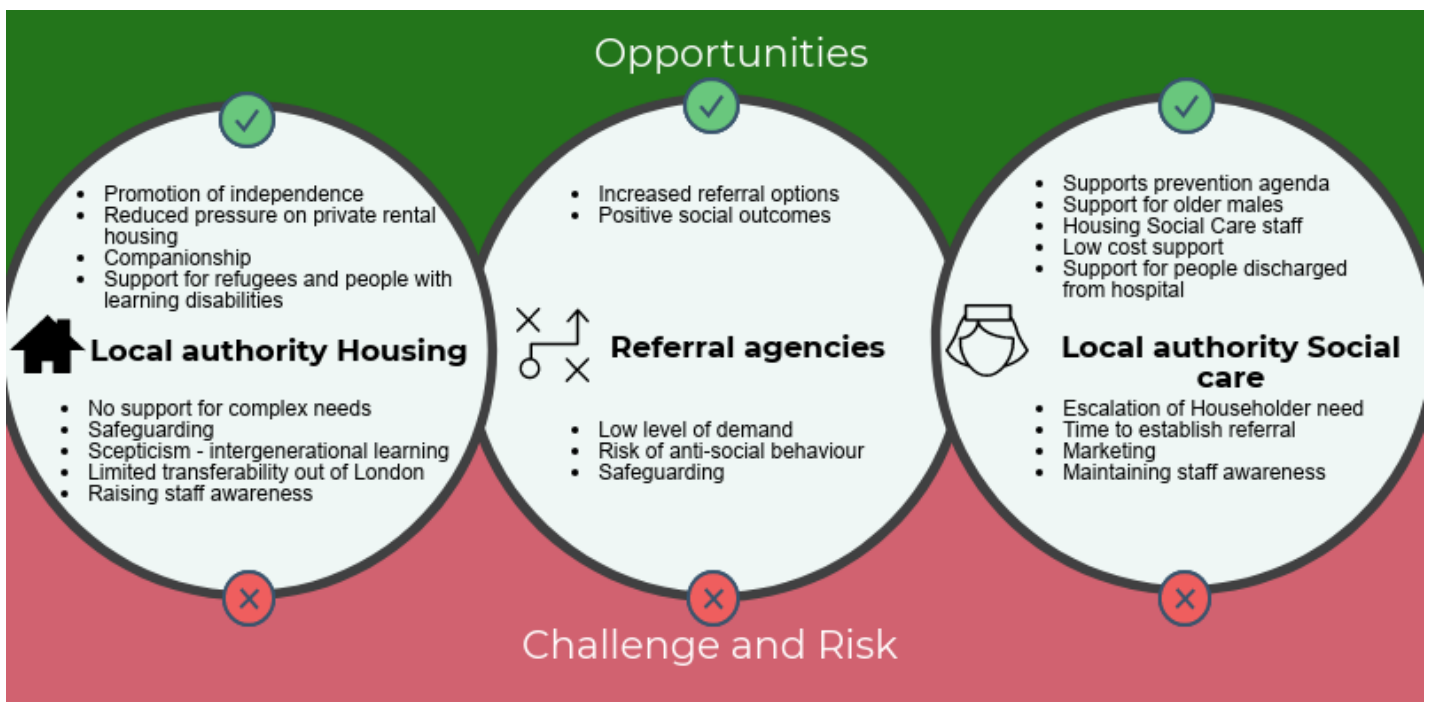
Risk and challenges in engaging with Homeshare

Key risks and challenges identified by referral agencies included:

¹⁹ This personal care assistant was providing support locally to individuals in receipt of personal budgets. However, she had identified a number of individuals for referral to a local Homeshare through social connections of her clients (for example, the neighbour of her client).

- **Low level of demand:** a Strategic Commissioner for Later Life and Dementia, a Social Prescribing Service and one social housing provider all expressed reservations about the level of demand for Homeshare amongst both younger and older people. For potential householders, some referral agencies cast doubt on whether an older person would want to share their home with a stranger. For homesharers, two referral agencies reported that younger people were often looking to live on their own rather than sharing.
- **Perceived risk of anti-social behaviour:** both of the social housing providers interviewed identified potential risks in terms of their organisations’ liability for any negative impacts on potential householders’ benefit claims and potential anti-social behaviour issues. For potential householders, the main risk identified was their own liability for any criminal activity in the property.
- **Safeguarding:** a Strategic Commissioner for Later Life and Dementia and a personal care assistant had concerns about safeguarding when they first heard about the scheme but, in both cases, these were alleviated by the HSP site sharing further information on their practice. However, no other agencies reported concerns, while one referral agency that sits on their local Adult and Children Safeguarding Board commented that they were “reassured by [the HSP site’s] knowledge of the subject”.

4.3. Summary of key findings



5. Sustainability and legacy

This chapter describes the HSP site plans for future development, and identifies learning generated from the HSP for HSP sites, HSP partners, commissioners and the wider Homeshare and health and social care sectors. This learning is presented in the context of wider policy changes and includes a framework of factors to consider for future commissioning of Homeshare projects.

5.1. Purpose of this section

This section takes the key findings from the data collection and considers the sustainability of HSP sites and the legacy of the HSP beyond the end of the funded period. Firstly, this section identifies a framework of factors for commissioners to consider when funding Homeshare schemes in the future, followed by an assessment of the alignment of Homeshare with current social care policy context. This section then identifies a number of key messages for audiences involved with Homeshare and then goes on to identify wider learning beyond the pilot programme.

5.2. Future development of HSP sites

During endline fieldwork, HSP sites were asked about their plans for future development of their approaches. Four HSP sites were positive about the future and remained committed to continuing their work beyond the funded period, whereas three HSP sites were less sure of their future viability due to concerns over future financial viability of the scheme (arising from the low number of matches achieved to date). Sustainability was a key concern for all HSP sites in planning for future development and HSP sites identified a number of strategies to ensure future sustainability beyond the funded period.

- **Adaptions to targeted householder and homesharer group:** Age UK IOW in response to local demand considered financial viability was dependent on increasing the age of Homesharers and more flexibility on the age of Householders including considering older (over 50) homesharers be matched with younger householders.
- **Extending geographical reach:** PossAbilities had started to work beyond Rochdale and to extend out to Nottingham (supporting individuals previously in contact with Click Nottingham) and York, where they have received interest from prospective householders
- **Reviewing fee structure:** two sites had considered changing their fee structure to support financial sustainability, Age UK Oxfordshire had considered charging current and future householders for their participation in the scheme, and Age UK IOW were considering different models for charging fees.
- **Need for increased time to achieve matches:** All sites identified that they needed more time to achieve matches. Three sites (Leeds City Council, Novus and Age UK Oxfordshire)

were in conversation with funders to re-profile their under-spend and to extend the funded period.

- **Planning scenarios for model beyond funded period:** both Age UK Oxfordshire and Novus had undertaken work to revise and review models of number of matches achieved and to forecast their proposed response and development as a result of this.

During endline fieldwork in October 2017, Novus reported they had achieved profitability for the first time, in recognition of changes to their staffing structure and sustained number of matches.

5.3. Key learning emerging from HSP sites

5.3.1. Factors to aid the commissioning of future Homeshare schemes

From analysis of data collection and through co-production with HSP sites, we have co-produced a framework of factors for commissioning Homeshare schemes, which commissioners are advised to consider in funding new Homeshare schemes. This is presented as seven key points for consideration by local authority commissioners, and presented in order of developmental phase:



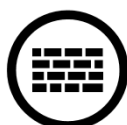
1. **The existing establishment of, or clear plans to develop local partnerships:** local partnerships are important in being able to develop approaches and establish routes of referral with local authority leads in social care and housing, and local providers of complementary services and are required at both the operational and strategic level to be able to engage both commissioning teams and frontline staff.



2. **Clear evidence of alignment with local need:** for example, schemes have or show how they will work with local authority commissioners and referral agencies and have or will undertake a robust and well evidenced analysis of local demography and local policy to identify viable markets within the local population which can be supported through the Homeshare model.



3. **A planned, targeted and sustained marketing approach from the outset:** demonstrating how schemes will reach householder and homesharer audiences to raise and sustain awareness of Homeshare within referral agencies and members of the public. There should be clear evidence of the range of marketing approaches planned such as online approaches, events and presentations to local groups and communities, and plans and timelines for monitoring a review of the approach.



4. **An institutional infrastructure with access to skills in policy development, service delivery and development of a sustainable business model:** whether this is achieved through being supported by an established local “host” organisation or an organisational structure that is robust enough to support the start-up phase, schemes should evidence how they will build in expertise in these key areas. Schemes should be able to demonstrate how they will draw in skills from within or outside the organisation to supplement the skills of core staff in developing their approaches, and



evidence their existing knowledge and experience of supporting targeted homesharer and householder groups.

5. **Business plans which allow for flexibility in approach:** schemes should have clear plans which demonstrate how their approaches can be adapted to changes in housing and social care policy over time, to allow for realignment where necessary to accommodate new markets which may have emerged or to accommodate changes in local need (such as influxes of new populations or increased pressure within the local system).



6. **Policies and practice to evidence safeguarding and quality assurance of delivery:** schemes should have in place or demonstrate how they will develop or adapt existing policies on safeguarding, privacy and other risks which may arise through Homesharing, to ensure risk is minimised and to identify plans for management of the risk.



7. **Evidence of a bespoke matching process:** in generating matches, schemes should demonstrate how they take into account personal interests and support requirements of individuals to provide a firm foundation for the match and to optimise chances of match success. Matching processes should account for managing expectations around provision of ten hours of support in the early phases of a match, and provide a clear indication of how support and communication is to be managed with both parties.

5.3.2. Transferrable learning for Homeshare

In addition to factors to consider in commissioning Homeshare for wider audiences, the HSP has generated wider learning for the Homeshare sector: for householders and homesharers, for Homeshare providers, for Homeshare practitioners, and for commissioners of Homeshare.

Learning for householders and homesharers

This evaluation has identified a number of factors which underlie a successful householder and homesharer relationship:

- **Bespoke, person-centred matching:** Successful matches require unique agreements between householders and homesharers in how living space is divided and shared, and how the ten hours of support is provided monitored and varied over the course of a match.
- **Clear communication** is a key stone for successful matching, particularly in the early phases of a match where householders and homesharers may face difficulties in learning how to share space and to align expectations for the match, and to develop conflict resolution for the duration of the match.

- **Shared interests:** finding common ground between householders and homesharers such as religion, political allegiance or hobbies and interests facilitated bonds being developed between householders and homesharers more quickly.
- **Defined support boundaries:** such as ensuring both parties are agreed on expectations around noise, shared space, time spent together and what can and cannot be provided within the ten hours of support.
- **Role of Homeshare organisation as an intermediary:** provided by a Homeshare agency provides a valuable resource for conflict resolution, ensuring the conditions of the match are met, and independently monitoring the support provided.

Learning for Homeshare providers

For Homeshare providers both within and outside of the Homeshare programme, there are a number of key learning points:

- **Slow burn initiative:** setting up Homeshare takes time, both to build partnerships, establish policies and practice and to communicate the role of the concept in supporting local needs.
- **Development tools:** there is a suite of tools from the Homeshare programme which are able to support new site development, including the LBF financial modelling tool, independent evaluator data tool, Policy and Practice materials from Shared Lives Plus, the Quality Assurance Framework and the Homeshare UK website to capture new referrals.
- **Engagement of local authority partners:** requires sustained effort to account for churn in local authority teams and restructuring. Partners require assurance and sustained contact on process, risk and safeguarding.
- **Sustained and segmented marketing:** with local authority partners, referral agencies and the wider public is required to ensure a steady supply of householders and homesharers and to raise local awareness of Homeshare
- **Lower staffing reduces number of matches required for sustainability:** comparative analysis identifies HSP sites with a smaller staffing structure and lower set up costs (such as office space) require fewer matches to cover their overheads.
- **Social impacts carry an economic value:** a number of reported impacts in improving mental and physical health reduce costs to statutory health and social care services.

Learning for organisations working with Homeshare providers

HSP site interaction with local organisations to set up routes of referral has also provided some transferrable learning for agencies considering using Homeshare to support their own objectives:

- **Prolonged engagement:** with Homeshare providers, due to Homeshare taking time to become established, Homeshare schemes take time to develop and may vary approaches in response to local need, so require a continued engagement

- **Matching takes time:** successful matches are based on aligning the personal characteristics of homesharers and householders and ensuring both parties are subject to appropriate checks (such as DBS), which takes time to set up a match.
- **Appropriate referrals:** Homeshare supports matching individuals with particular characteristics in terms of age, profile of need, working status, complexity of support need and vulnerability, all of which need to be understood more fully prior to establishing a match.
- **Support for reduction of use of public services:** Homeshare can support reduction of housing and social care services for individuals with low level needs, and can be used as an early preventative measure in building support.

Learning for local authority frontline practitioners

For local authority housing and social care practitioners supporting local need, there are a number of key learning points for successfully working with Homeshare:

- **Raising awareness:** requires a sustained effort by Homeshare staff, through engaging both at the strategic and operational level to ensure Homeshare remains a key local priority.
- **Information:** provision of up to date information and resources are essential to ensure frontline staff can easily direct individuals towards Homeshare and have sufficient information to brief individuals on how Homeshare can offer support.
- **Low level support needs:** Homeshare represents a preventative source of support for those with low level social care and housing needs, who may not meet the eligibility threshold for statutory services.
- **Householder and homesharer profile:** a clear description of typical householder and homesharer profiles is valuable for frontline practitioners referring individuals to Homeshare.
- **Ongoing consideration of the role of Homeshare:** changes to the benefits system present a changing landscape for the support provided through Homeshare and provides opportunity to reconsider the role of Homeshare as a method of support.

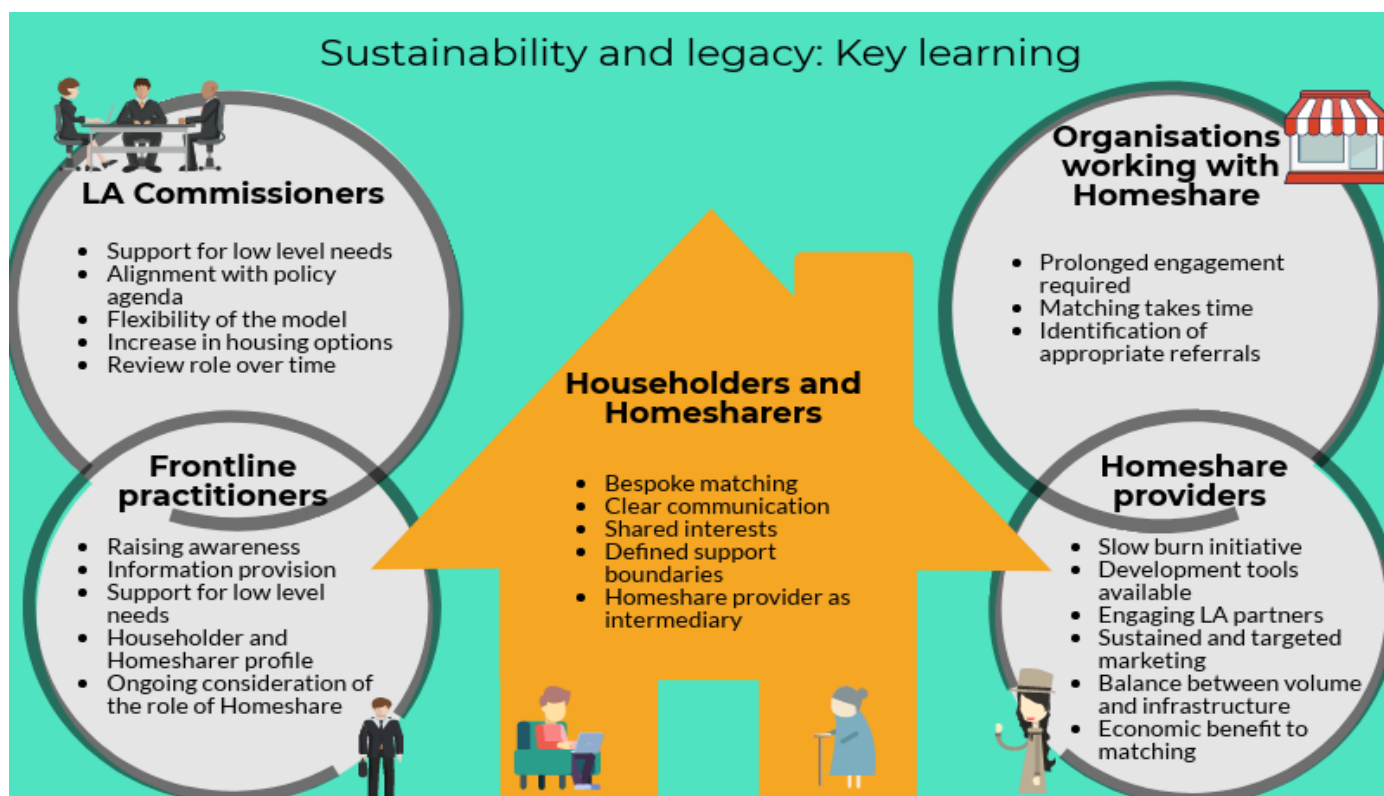
Learning for Commissioners

For commissioners, there are a number of considerations for Homeshare as a mechanism of support:

- **Support for people with low level support needs:** Homeshare can provide support to those with low level support needs who may not be eligible for social care support, and provides an affordable alternative to social housing.
- **Alignment with wider policy agenda:** Homeshare aligns with the wider preventative and self-care agenda, encouraging individuals' needs to be managed within the community rather than through institutional support and supporting development of individual resilience.

- **Flexibility of the Homeshare model:** Homeshare can provide for key markets/needs which are not currently being met by social housing and social care provision such as isolated older householders, young people awaiting housing, which vary by locality.
- **Increase in housing options for young people:** Homeshare offers an alternative for younger single people in search of affordable housing.
- **The role of Homeshare needs to be reviewed over time:** churn in local authority operational and strategic support leads to lack of awareness of local support, so support needs to be communicated over time.

5.3.3. Summary of key messages



5.4. Role of Homeshare within a changing policy context

Within the current housing and social care policy context, Homeshare represents a viable initiative that has the potential to contribute to meeting strategic commissioning priorities. Specifically, Homeshare as a concept supports the following agendas for change:

- Alignment with self-care agenda and patient self-activation, allowing individuals to play a key role in managing their own health and care needs as an equal partner in determining their care.

- Move towards increasingly supporting individuals to remain living at home within their own environments and receiving support within the community rather than in institutional care settings.
- Increasing personalisation of care and support, allowing individuals to have choice and management over how their care and support needs are met.
- Increased emphasis on preventative measures to promote health and wellbeing amongst the older population and to investigate how best these support needs can be met.
- Community asset-based approaches, using the skills and abilities present within local communities to support one and another (and reciprocity between older and younger generational support giving).

5.4.1. Alignment with wider policy changes

Through local authority interviews and discussion with HSP sites, a number of recent or upcoming benefit changes have been identified which have implications for the demand from prospective householder and homesharer markets. As reported in the Shared Lives Plus State of the Sector report 2017, loss of benefits is a key barrier preventing homesharers engaging with Homeshare.

Wider policy changes affecting the householder and homesharer market

Table 10: Policy changes affecting Homeshare

Policy	Impact on householders or homesharer market:	Implications for Homeshare:
Housing and welfare benefits		
Change of Support for Mortgage Interest support to a loan	From April 2018, there will no longer be the Support for Mortgage Interest (SMI) payments available for owner occupiers who are out of work or of pensionable age, a form of housing benefit allowing homeowners to receive support with payment of their mortgage interest costs. Instead, this benefit will be replaced with a loan, which ultimately will have to be repaid on the sale of a property.	Owner occupier householders will face increased pressure to meet their own housing costs as in future all financial support received through this benefit will have to be paid back to the Department for Work and Pensions.
Reduction of housing benefit, due to having one or more spare bedrooms often referred to as “bedroom tax”	As of April 2013, anyone living in social housing or a council property, residents face a loss of housing benefit on their eligible rent, equivalent to: <ul style="list-style-type: none"> • 14% of the eligible rent for one spare bedroom; and • 25% of the eligible rent for 2 or more spare bedrooms 	This only affects householders who are younger than pensionable age, those over 64 and 9 months (as of April 2018) are exempt from this reduction.

Loss of single person's council tax reduction	Under current legislation, householders living independently receive a 25% reduction in their council tax, as council tax is calculated on the assumption each home is inhabited by at least two people. There are some exemptions to this; such as if you cohabit with a care worker, full time student or someone with disabilities.	Householders pursuing Homeshare currently face a loss of the single person's living allowance.
Income from Rent a Room scheme	The Rent a Room scheme is available to anyone who is a resident landlord, whether they own the property or not. This allows individuals to rent out rooms within their house, and receive tax relief. As of April 2016, the tax exemption was raised from £4,250 to £7,500.	The rent a room scheme offers an alternative which householders might consider as an alternative to Homeshare.
Reduction of pension credits (such as guarantee entitlement)	Pension credits are an income related benefit provided on a weekly basis to older people to bring their entitlement up to the minimum weekly entitlement (£159.35).	Pension credits reduced due to having a non-dependent living within the home (homesharer) who can contribute to household bills and support cost of living. This could also affect individuals in receipt of SMI payments, housing benefits and severe disability premium support and is dependent on income of person moving into the home.
Universal credit – removal of housing benefit	As of April 2015, the housing costs element of Universal credit was removed for single people aged 18-21, subject to all of the work related requirements of universal credit.	Removal of housing benefit from Universal credit for younger people has been suggested to potentially lead to increased pressure on social care housing markets. ²⁰
Severe disability premium (for working age benefits) and the severe disability addition (for Pension Credit)	Loss of severe disability premium on pension due to living with another person.	Loss of benefits for householders less willing to share with homesharers.
Social care		
Increasing emphasis towards self-care and support	As described within the Five Year Forward View, there is an increased emphasis being placed on self-care, with	Increased emphasis on self-care will encourage older people with long

²⁰ Recent data suggests however that the majority of 18 to 21 year olds (96%) have been awarded the support. <https://www.gov.uk/government/statistics/removal-of-automatic-entitlement-to-housing-costs-for-18-to-21-year-olds-in-universal-credit>

	<p>the Patient Activation Measure (PAM) being developed as a measure to identify the ability of individuals to manage their own treatment of long term conditions. Clinicians are being increasingly encouraged to advocate for self-care and support.</p>	<p>term conditions to consider how they might be supported through alternative means.</p>
<p>Reduction in local authority spending on social care</p>	<p>Recent report from the King’s Fund and the Nuffield Trust²¹ points to a reduction in local authority spending between 2009 and 2014/15 of 9% in real terms, where 81% of local authorities have reduced their spending on social care for older people, despite initiatives such as the Better Care Fund.</p>	<p>Reduction in social care expenditure implies greater pressure on eligibility thresholds and that lower level needs are less likely to be met. Householders are less likely to be receiving social care support, particularly for low or moderate support.</p>
<p>Personal budgets to manage support</p>	<p>Local authorities have the responsibility to provide personal budgets and direct payments to anyone who is eligible for social care support under the Care Act 2014. The support which an individual receives or needs to receive is specified within a Care and Support plan, which outlines the outcomes which support should enable</p>	<p>Potential opportunities for personal budget funding to be used to support costs of Homeshare (such as agency fees) if it can be demonstrated to support outcomes in an individual’s care plan.</p>

5.5. Transferrable learning on supporting innovation

In a context of changes to health and care policy, Homeshare is an innovative way of providing social and housing support but also in the context of transformation and integration of services, is an exemplar of how to provide personalised support within home settings. Homeshare as an agreement involves three parties: the householder, the homesharer, and a Homeshare scheme acting as an intermediary. In developing a Homeshare agreement, there is wider learning in what works in co-producing support between the support recipient (normally the householder), the support giver (the homesharer) and how Homeshare schemes facilitate this discussion and monitor the support provided. Analysis of the process by which support is co-produced between the three parties offers learning for Homeshare providers, but in addition provides wider learning for choice and innovation in service delivery.

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https://www.kingsfund.org.uk/sites/default/files/field/field_publication_file/Social_care_older_people_Kings_Fund_Sep_2016.pdf (p14)

5.5.1. Programme-level learning from the partnership

Achievements of the partnership

In the context of the transformation agenda for social care and housing the HSP partnership demonstrates new models of applying co-production and multi-disciplinary working to support innovation. The evaluation findings indicate that the overall programme design has worked well to strengthen the sector by the creation of new infrastructure that will extend beyond the life of the programme. It has also increased the critical mass of Homeshare provision at a national level, directly through the seven continuing HSP sites and also by stimulating and supporting new development within the wider Homeshare sector through the Homeshare network support delivered by Shared Lives Plus which is funded to continue for a further two years. Specific achievements include:

- Applying a multi-disciplinary approach to a complex mix of concerns including the key issues of localism and economic sustainability which addresses the different strategic funding priorities for both Lloyds Bank Foundation for England and Wales and the Big Lottery Fund.
- New sector level support infrastructure now in place, including an online “hub” and with tools that provide long term benefits for both sites and wider audiences.
- This infrastructure now has the potential to deliver a sustained body of evidence of “what works”, including comparative data and benchmarking, for both providers and other audiences.
- There is a strong foundation for further future work to strengthen the sector in ensuring quality assurance, robustness and validity of further learning generated by the programme legacy.

Opportunities created by the partnership approach

The set up and design of the partnership has offered a number of opportunities and wider learning in how to support pilot projects to develop innovative approaches. Opportunities presented through the partnership have included:

- **Measurement of innovation:** bringing together the views of partners about how to define and measure innovation within funded projects, in bringing together financial sustainability, process learning and focus on individual outcomes of beneficiaries.
- **Co-production within the partnership:** opportunities to bring together differing perspectives and identifying common ground between partners and individual sites, such as using theory of change approaches and re-evaluating support needs of HSP sites through programme structures (such as the delivery group).
- **Variation in the support provided to HSP sites:** providing both operational and strategic support required and varying this support by individual HSP site developmental stages.

- **Offering support to both new and existing projects:** providing bespoke support to individual projects according with differential development trajectories, while maintaining a unilateral partnership offer.
- **Dynamic between supporting funded projects and impact on wider sector:** developing a suite of partnership tools to support the wider Homeshare sector and sharing key messages and learning from the pilot programme to support wider Homeshare scheme development.

Challenges for the partnership approach

In bringing together a range of sector experts and funders to deliver the partnership, a number of challenges have arisen, in particular:

- **Time needed to form new ways of working together:** bringing together different funding arrangements, methods for providing support and organisational priorities has taken time, particularly to establish the individual role of partners within the partnership.
- **Communicating partnership roles with clarity:** describing roles, responsibilities and accountabilities of partners and ensuring that the support on offer from partners has been clearly communicated to HSP sites has been challenging.
- **Sharing and maximising skillsets of different organisations:** working arrangements between partners to extend beyond organisational roles to develop matrix working so that the specialist skills within each organisation benefit the programme as a whole.
- **Delivering a locally responsive model within a national model:** clarifying what is core support provided by the partnership and how this supported can be supplemented or flexed at a local level.
- **Understanding local data in a national level comparative context:** appreciation of the variation in context of HSP sites, and the impact which this can have in drawing comparisons across local areas (particularly within economic assessment).
- **Transformation and innovation and the virtuous evidence cycle and agenda:** when is 'what works' the right or only question compared to understanding barriers or 'what doesn't work'.
- **Rolling out 'models' compared to co-produced locally determined projects:** allowing HSP sites to determine their own approaches according to their local environment, rather than asking HSP sites to implement a standardised model.

5.5.2 Evaluation learning

In OPM's role as a learning partner, there are a number of key lessons emerging from the HSP in how to evaluate locally co-produced projects in a dual role as a learning partner and an evaluator. Specifically, the programme evaluation has generated learning for evaluation on:

- **Co-production in evaluation:** how HSP sites have been brought together to co-design evaluation tools, shape evaluation messages and learning and findings have been tested and shaped by key stakeholders.
- **Managing dual objectives:** in both supporting HSP site development as a learning partner and an independent evaluator, shaping pilot approaches while avoiding contamination of findings.
- **Developing and embedding a culture of evaluation:** beyond sharing tools for HSP site development and own evaluation, fostering a culture of reflection and learning within HSP sites.
- **Use of realist approaches to contextualise findings:** through use of logic modelling, scoping of local context and speaking to a wide net of local stakeholders to fully evaluate the impact of the programme
- **Adopting a flexible approach to evaluation:** reconsidering evaluation structure over time to allow for changes in programme delivery and to ensure the evaluation methodology best identifies impact and process learning.

Limitations of the evaluation

While the evaluation has identified learning in what works, there are limitations to the existing findings:

- **Lack of matches:** findings on “what works” in matching is based on only three HSP sites. Distribution of matches between the three HSP sites is not even, where Novus has substantially more matches than any other HSP site.
- **Out of London context:** the limited matching data in HSP sites based outside London have limited the insight into “what works” in developing Homeshare outside London and the south-east.
- **Quantitative assessment:** limited number of matches achieved and some HSP site difficulties in using the independent evaluator tool have limited the extent of the quantitative assessment of the programme.
- **Limited experience of what works with specialist groups:** there has been limited insight on what works in establishing HSP sites in working with specialist groups such as those with learning disabilities and those with more complex support needs.

6. Conclusions

This chapter provides an overview of the key learning from the evaluation of the HSP considering the wider policy context and transferrable learning for the sector.

6.1. Key messages

In a broader policy context of increasing personalisation and choice in the provision of social care, and promoting care and support within the community by enabling individuals to remain at home, Homeshare represents a viable support option for individuals with low level social care and housing needs.

Homeshare sites

The HSP has generated learning from the Homeshare sector and organisations looking to work with Homeshare schemes. For new Homeshare schemes, best practice will be to develop policies and practice, build on existing organisational contacts, establish an advisory group and adopt flexibility in learning how to develop their approaches. Enquiries can be generated through use of segmented marketing approaches which allow for targeting niche markets effectively, developing referral pathways with organisations with complementary aims to Homeshare and building relationships with matches on meeting face to face. Once matches are made, sustaining matches is dependent on establishing early rapport with householders and homesharers to build trust that they will be able to contact a Homeshare site in the case of conflict or to clarify their role within a match, and in managing expectations of what Homeshare will be able to provide. Making bespoke Homeshare arrangements is important, and recognising that support provided within matches will change over the course of a match.

Homeshare providers need to engage local authority partners throughout the development of their project, to align their project with local demographic need and to allay concerns with statutory partners, to lay the foundation for establishment of routes of referral. Provision of policy and practice documents allows providers to demonstrate their credibility to address concerns such as risk, liability and safeguarding. Conversation with local authority partners requires sustained contact, to update partners on the current focus, needs intended to be supported by Homeshare and to maintain Homeshare as a strategic priority in light of changes in staff. Throughout the development and delivery of a Homeshare scheme, learning and development is essential, through evaluation of success in engaging local populations and the efficacy of marketing materials. Reflective practice can be supported through drawing on knowledge and expertise from other Homeshare schemes and wider organisations.

Local authority housing and social care

There appears to be an increasing appetite for Homeshare amongst local authority commissioners who see it as meeting their strategic aims of supporting older people to remain at home for longer; as a means of support for people below existing support thresholds and to

target key demographics of more vulnerable people such as older males. Shared Lives Plus has reported being contacted by a number of local authorities over the last year with an interest in understanding more about Homeshare. Successful application of Homeshare is reliant on an ongoing conversation with local authority housing and social care teams, which requires a sustained over the course of developing a scheme. The Homeshare model has flexibility in how it is applied within local contexts, which offers local authority leads the opportunity to shape the development of the model to align with local priorities. As schemes take time to develop and reach a point of receipt of referrals, the model offers the opportunity to be responsive to changes in local policy. Within local authorities, Homeshare needs to be communicated at both the strategic and operational level, to allow senior buy-in and to build strategic opinions on direction, but also for frontline staff to develop and maintain a working knowledge of how Homeshare can support local provision.

Frontline housing and social care professionals

Engaging frontline housing and social care professionals to build an awareness of Homeshare is of critical importance as a primary interface with potential Homeshare and householder applicants. Raising awareness amongst frontline staff is important, to ensure Homeshare remains at the top of mind for social care and housing professionals in being able to direct clients to alternate means of support. Keeping frontline professionals up to date on the current direction and focus of the scheme over time through providing detailed information on the profile of appropriate householder and homesharers is key, to ensure appropriate referrals and that prospective householders and homesharers have an awareness of what support Homeshare is able to provide.

Referral agencies

Referral agencies, like local authorities, are essential partners to enable Homeshare to become a viable and self-supporting scheme. Communication between referral agencies and Homeshare schemes is crucial, to generate a shared vision of how Homeshare can support individuals in contact with both organisations, and to identify referral processes and practice. Homeshare is unlikely to be able to provide immediate support for someone approaching a housing or social care crisis, but does offer an alternate means of support for low level housing and social care needs, and the demographic profile for who is best supported by Homeshare can be decided between both organisations.

Prospective householders and homesharers

Homeshare offers an opportunity to increase companionship between two single individuals, and to form mutually beneficial relationships. Successful homesharing involves a bespoke match being made, taking into account personal characteristics to ensure the need of both householder and homesharers are met. Homeshare promotes intergenerational learning, lasting social connections, companionship and improvement in mental health and wellbeing among matches. To enable this to happen, matches require independent support, particularly in the early phase, while working through alignment of daily schedules, sharing of space and deciding how the ten hours of support time will be spent. Clear communication is needed

throughout the course of a match, with support from Homeshare schemes to facilitate conversations and to act as an intermediary in times of conflict.

6.2. Wider learning beyond the Homeshare sector

In a context of service transformation and innovation to meet the needs of an ageing population combined with reduction in local authority spending, the HSP represents an example of how to support innovation which has wider application beyond Homeshare. Bringing together two funding organisations and sector experts with differing aspirations and definitions of success has generated learning in the challenges and opportunities of doing this. There is also learning around communication and provision of partnership support, ensuring the roles of each partner are communicated clearly, and that individual pilot projects are supported according to their individual developmental and contextual needs in a programme which is directed to supported tailored solutions rather than roll out of models.

6.3. Concluding comments

The HSP has been successful in supporting the development of a number of Homeshare sites, with a clear legacy of learning and infrastructure to build stability for the wider Homeshare sector. While none of the HSP sites have met their original intended matching profiles, three HSP sites have achieved and sustained matches during the programme, evidence indicates that their momentum is building, and the remaining HSP sites remain confident that they will achieve additional matches over time and most are on track to do so. As the HSP funded phase of work comes to an end, HSP sites have continued momentum, a legacy of learning, and established networks within the HSP and wider Homeshare sector which will enable continued development of their schemes. The HSP has made a substantial contribution to the body of evidence on “what works” in taking forward a sustainable and locally adaptive model of Homeshare service provision.

The HSP also offers wider learning in what works in supporting innovation within delivery of social and housing support, and transferrable learning to inform commissioners, frontline professionals, referral agencies and prospective householder and homesharer groups in achieving this ambition.

7. Acknowledgements

First and foremost Traverse would like to thank the local leads at the eight HSP sites for their sustained involvement in and co-production of the evaluation. We also particularly want to thank the homesharers and householders who took part in interviews and were willing to share their experiences of and thoughts about Homeshare with us, adding depth and richness to our understanding of “what works”. We are also very grateful to the local authority staff working in the housing and social care sectors across both strategic and frontline service delivery roles and the staff from local voluntary and referral organisations, all of whom generously contributed their time and their local expert knowledge to support and feed into the evaluation. Traverse would also like to thank Lloyds Bank Foundation for England and Wales and the BIG Lottery Fund for commissioning and ongoing support of the Evaluation of the Homeshare Pilots, Social Care Institute for Excellence (SCIE) for their role in managing the evaluation and the other HSP partners of Shared Lives Plus, Age UK and Foyer Federation for their support throughout the evaluation.

8. Addendum: Matches achieved by HSP sites in December 2017

The final fieldwork data collection was completed as of 7th October. The following table presents an overview of matches achieved by HSP sites, as of 14th December 2017, collected as part of Age UK quarterly monitoring information after fieldwork had ceased. This is to provide the most recent update of matches achieved by HSP sites.

Table 11: HSP site progress in achieving enquiries and matches as of 14th December 2017

Pilot	Matches ²²
Edinburgh Development Group	-
Age UK IOW	-
Knowsley Housing Trust & PSS	-
Novus	18
Age UK Oxfordshire	4
PossAbilities	5
Click Nottingham	-
Leeds	1
Grand Total	28

²² Matches are cumulative number of matches created and sustained at the time of reporting (14th December 2017).

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