

SAN DIEGO SHARED HOUSING COLLABORATIVE PARTICIPANT SUPPORT CHECKLIST

Housing Navigation and Location Phases

You're working with a participant who has expressed interest in shared housing. Yay! But, now what? This checklist is designed to help you help participants navigate the shared housing process. It can be tailored to meet your organization's or your role's expectations to ensure a successful participant experience. Also, remember that each participant's situation is unique so adapt the checklist to meet individual needs and ensure participants feel supported and empowered throughout their journey to secure shared housing.

Document Participant Information (at all stages of the process):

- Record the participant's contact details, including phone number and email.
- Document relevant information in the Homeless Management Information System (HMIS).

Initial Assessment:

- Confirm the participant's interest in shared housing.
- Determine if the participant meets the eligibility criteria (i.e., experiencing homelessness and sufficient income).
- Learn about your participant's preferences and housing needs (e.g., location, accessibility).
- Complete the Shared Housing Assessment in HMIS.

Provide Information:

- Explain the shared housing initiative's purpose, benefits, and how it works.
- Share any relevant guidelines and expectations.
- Discuss the portal profile process and the required documents or information.
- Provide the participant with access to the portal.
- Offer your participant assistance in using the portal and completing their profile.

Schedule an Appointment:

- Meet with the participant to discuss their progress.
- Confirm the date, time, and location of the appointment.

Assist with Housemate Search:

- Offer to assist the participant in searching for and reviewing compatible housemates.
- Offer support to the participant in messaging potential housemates whose profiles interest them.
- Encourage polite, safe, and respectful communication.
- Provide emotional support and guidance to the participant while looking for a housemate.
- Address any concerns or questions the participant may have along the way.

Schedule Meetings:

- Offer to help the participant schedule in-person or virtual meetings with potential housemates to discuss compatibility and expectations.
- Be available to guide and coach the participant on topics to cover during these meetings.
- Inform the participant about events, meet-ups, or workshops related to shared housing and encourage them to attend.
- Address any issues or challenges and offer solutions or referrals as needed.

Evaluate Matches:

- Offer to help the participant evaluate potential housemate matches based on their meetings.
- Encourage the participant to consider shared values, lifestyles, and communication styles when evaluating potential housemates.

Make a Decision:

- Support the participant in deciding which potential housemate to proceed with.
- Ensure the participant promptly communicates their decision with other potential housemates.

Agreement and Documentation:

- Assist the participant in creating a written agreement with their chosen housemate(s) outlining responsibilities, shared expenses, and expectations.
- Ensure all parties review and agree to the terms of the agreement.

Assist with Required Documents:

- Inform the participant about any documents needed for the housing application process (e.g., ID, income verification).
- Offer assistance in gathering and organizing these documents if necessary.

Create a Housing Plan:

- Meet with the participant to review their shared housing needs and preferences.
- Discuss any barriers or challenges the participant may face in securing shared housing.
- Develop a personalized housing plan based on their preferences and resources.
- Refer participants to eligible landlord engagement programs.
- If ineligible for landlord engagement programs, connect them with the collaborative's shared housing locator.

Application Process:

- Guide the participant through the housing application, including completing the required forms.
- Assist with submitting housing applications.

Follow-Up and Support:

- Maintain regular contact with the participant to provide updates on housing opportunities.
- Offer support with any challenges or concerns arising during the application process.
- Encourage the participant to attend housing-related workshops as available.

Review and Adjust:

- Review and adjust the housing plan based on the participant's progress and circumstances.
- Continue providing support until the participant successfully secures shared housing.

Celebrate Success:

- Acknowledge and celebrate the successful housemate match.
- When the participant finds a suitable shared housing unit, celebrate their achievement, and provide information on the next steps for maintaining stable housing.

Evaluation and Feedback:

- Collect feedback from the participant about their experience with the shared housing program, including using the portal to improve services.