

London Borough of Merton  
Shared lives Scheme  
Guidelines for Carers

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The London Borough of Merton runs a Shared Lives Scheme. This team has been in operation under various names since 1973. During this time many vulnerable adults have been placed successfully with Carers in the community.

### What is Shared Lives?

A Shared Lives placement provides accommodation and support to vulnerable adults 18 years and over. The range of clients is wide, including people recovering from mental health problems, older people, and adults with a learning disability. Clients may be offered somewhere to stay for a short break, for instance after a period of hospitalisation, or as somewhere to live for a longer period (up to 2 years with an option to extend further). It offers a real alternative to hospitalisation or admission to a Care Home.

The Shared Lives Carer provides help and support, either by sharing their own home with the client, or by offering floating support in another property. Many Carers offer support to more than one person at a time.

Shared Lives aims to provide accommodation and housing related support to enable a client to:

- Achieve a measure of independent living with skilled sensitive and personalised support. Shared Lives can be a step on the road to more independent living.
- Learn new life skills to help gain greater independence, for example help with managing finances, accessing education, and making well informed choices about their future personal plans
- Maintain health, well being and personal dignity
- Have the highest possible level of control over their own life including the option to pursue personal interests
- Be fully involved and informed about daily living arrangements, with consultation if there are going to be changes
- Have their views and needs respected, whether these are physical, social, emotional, religious, cultural, sexual or political
- Keep in touch with existing family and friends, and establish new social contacts - for instance by being included in plans with the Carers family
- Choose their own doctor (where a choice is available), dentist and other professionals and be able to consult with them in private
- Gain access to other services and community organisations
- Benefit from a safe and secure home environment, with confidence that both the accommodation and Carer are regularly monitored as part of the service
- Participate in regular defined reviews of their individual circumstances, (with an advocate if preferred)
- Voice concerns and know how to make a comment or complaint about the service where necessary

### Scheme monitoring

Shared Lives Schemes are affiliated to Shared Lives Plus (National body for Shared Lives Schemes) as well as other regional schemes. For more information on the work of Shared Lives Plus and areas it covers, contact:

#### **SharedLivesPlus**

G04 The Cotton Exchange  
Old Hall Street Liverpool  
L3 9JR

Tel: 0151 227 3499

Fax: 0151 236 3590

### Carer recruitment

Carers are recruited by the Shared Lives team whose officers are also responsible for monitoring the quality of the care and accommodation, as well as supporting and advising the Carer.

Carers are not employees of the council, being classed as self-employed. Once a Carer is approved, they are expected to accommodate and care for the clients placed with them in a manner acceptable to London Borough of Merton.

The term Carer is used because the role involves more than a landlord/tenant relationship. It involves extending friendship and trust, showing an interest in the client, thus enabling them to gain confidence and independence. No formal qualifications are required to be considered for a Carer's position. However some aptitude or experience of the relevant service user group, or a willingness to gain such knowledge would need to be demonstrated.

When a person initially enquires about becoming a Carer, they are given a brief description of what is required. The prospective Carer is invited to make a written application, including the names of 2 personal referees, and their GP for a medical reference. Arrangements can then be made for a home visit to the prospective Carers home, which will cover:

- Advice on the suitability of accommodation together with an Environmental Health Officer
- Information on the selection process
- The role of the scheme
- Responsibilities of SL Carers
- Details of the support and training they will be given
- Other general queries or concerns

The process of registering the application and contacting referees usually takes 4-6 weeks. An assigned officer will then contact the prospective Carer to arrange a pre Shared Lives panel assessment meeting, which covers information in greater depth. Items to be covered in this assessment are:

- Applicants interest in the work and any relevant experience
- Help and support available to the Carer, including back-up arrangements for sickness and holidays
- Confirmation of property ownership and financial stability
- Whether any potential issues with neighbours have been considered and addressed
- Condition of property, and willingness to co-operate with any recommendations for modifications if required by Environmental Health, for example fire regulations
- Details on room and facilities that will be available to the client

The officer will also ensure that the prospective Carer:

- Is aware of their responsibility to have adequate insurance, and business recording arrangements
- Understands the 'team approach' to the work, including working with care co-ordinators and other professionals
- Has an understanding of confidentiality requirements
- Is aware of the regular review processes
- Understands the contracts process (both with LBM and clients)
- Will have an appropriate complaints procedure in place

The officer will arrange a joint visit with Environmental Health to advise the prospective Carer of any relevant modifications to be undertaken. These must be completed before the application is taken to the Approval panel.

On completion of the assessment, the officer will write a report in support of the prospective Carers application, and present it to the Approval panel for consideration. The Approval panel is made up of a combination of people, which can include a current/ex service user, an unconnected SL Carer (i.e. from another scheme or an ex-carer), an internal specialist manager and an independent specialist. The Shared Lives team manager will inform the prospective Carer of the decision, including the appeals process.

### Accommodation requirements

A relaxed and caring atmosphere in a well furnished and equipped home is an essential component required in any placement. The assessment is made based on certain practical aspects.

- Property should be furnished with good quality fire retardant furniture. It should be clean, hygienic and free from stale odours throughout
- Smoke alarms must be wired into the mains in the hallway on each floor of the house
- Kitchen should have readily accessible fire blanket and extinguisher. If recommended on inspection, fire doors may need to be fitted. (Where premises are registered as a House of Multiple Occupation, more stringent fire precautions may apply)
- Communal areas should be comfortable and large enough to accommodate all people living in the home and to entertain guests or pursue simple hobbies
- Access to communal areas must be available at all times (any restrictions must be specified at time of placement)
- There should be a designated sitting/dining area, including colour TV
- Every client will have the use of a bathroom, toilet, kitchen and communal room

Heating – parts of the home available to the user should be maintained at the following temperatures, unless otherwise directed by individual requests:

- Clients bedroom - minimum 60 degrees F
- Communal areas - minimum 65 degrees F
- No free standing oil or liquid petroleum heaters to be used

Bedroom –

- It is a scheme requirement that all clients have their own bedroom. This should be in good decorative order. A single room must be a minimum of approximately 10 sq meters. There should be no fixed windows
- There should be a lock on the door to ensure privacy
- Beds must be full-sized single (3ft wide) or larger, with a fireproof mattress, and fitted with a headboard. It should be in good condition without broken springs, or soil marks
- There must be an adequate supply of bedding (at least 2 new sets) which should be in clean, good condition and adjustable, to take account of weather conditions
- Bedrooms should ideally be carpeted. These should be firmly fixed and in good condition. Where alternative flooring is in place, for example laminate, a bedside rug should be provided
- Curtains must be well fitting, preferably lined. They should be clean and in good repair. In certain places we may also ask that a net curtain is provided

- All furniture should be clean, in good repair and fireproof. It should match or be complimentary. There should be a comfortable armchair, a waste paper basket, mirror, and adequate hanging and drawer space for the clients clothing, (for example a chest of draws and a wardrobe)
- There should also be a bedside shelf or cabinet, with a bedside lamp (unless it is possible to switch off the main light from bed). Lampshades should be provided for all lights
- There should be a minimum of 2 electric points in each bedroom
- Clients should be allowed/ encouraged to personalise their room with pictures, ornaments, etc
- Music systems/portable TV would be optional. The client may choose to supply these.

Kitchen should contain –

- Refrigerator and cooker.
- Washing machine
- Microwave
- Non slip flooring, firmly in place, with no loose mats
- Clean and hygienic cupboards and worktops space
- Adequate supply of crockery, cutlery and cooking utensils

All gas appliances should be checked annually by a Gas Safe registered technician.

Bathroom should contain –

- Non slip flooring, firmly in place
- Bin, toilet paper, soap and hand towels should be provided
- Door with a lock that can be opened from the outside in an emergency
- Fittings must be kept clean and sanitised

Access to home –

- Client should be encouraged to consider the placement as their home and access must be available at all times. A key should always be provided unless this has been specifically discussed and agreed with all concerned including the Care manager and Shared Lives team.
- Within reason there should be no time restrictions for entering/ leaving the home
- Visitors should be welcomed and encouraged during reasonable visiting hours.
- The installation of a pay phone for use by clients, may be recommended.

An annual accommodation assessment is conducted at each placement address. This incorporates health and safety checks and recommendations.

### Agreements and communication

A written agreement will be made between the Carer and London Borough of Merton. This will outline the terms and conditions by which placements will be made, training and support to be given, as well as providing a framework for expectations of the service.

Carers risk assessments and appraisals will be carried out regularly. This includes an annual review of accommodation and standards of care. Carers and clients are expected to contribute to all placement reviews for the client, including the initial 28day review.

Risks both to the client and carer are re-evaluated where situations change, and the Carer would be expected to co-operate with representatives of the Scheme in any risk discussion and decision-making, as well as informing the Scheme of potential changes that may alter risk.

A named Shared Lives officer will conduct planned and unplanned visits to each placement (at least every 2 months), along with regular phone contact. In addition, this officer will provide advice and support to the Carer. This may involve discussions around additional support or break periods where required by the Carer for long-term placements.

Along with other guidance listed here, the Carer is expected to:

- Follow the Schemes policies, procedures and guidelines
- Meet the Shared Lives Scheme's insurance requirements
- Inform the Scheme of any change of address or family circumstances
- Respect confidentiality of information relating to the client and Scheme in line with the requirements of the Data Protection Act 1998
- Give a minimum of 28 days written notice to the Shared Lives Scheme of intention to discontinue as a Carer
- Discuss with the Shared Lives Scheme any arrangements for the client to be supported by another person
- Inform the scheme immediately if there is an emergency situation or accident involving the client, any serious incident involving the client, or where any abuse is suspected

### Other sources of support and information

Carers will be expected to participate in regular relevant training. As well as matters covered in induction, specific training may be made available on health and safety, food handling and hygiene, the Mental Health Capacity Act, and other issues around vulnerable adults.

An additional support network is provided through the independently run Carers group.

Carers are encouraged to become members of Shared Lives Plus. For a small annual fee, membership benefits include regular updates and newsletters, discounted publications, courses and insurance rates, as well as a chance to meet and discuss service issues with other Carers.

### **SharedLivesPlus**

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### Client entry into the scheme

A client may be referred directly to the scheme, by their social worker, key worker or care manager. Additionally they or their family may express an interest in being referred.

After the Care Co-ordinator has conducted an initial needs assessment on the client, they would contact the Shared Lives Scheme. A Shared Lives Officer then matches the client up with potential carers. A meeting will be arranged with both parties, and sometimes an overnight stay or an evening meal, to give both Carer and Client an opportunity to get to know each other better before making a decision. The timing of this may differ in different cases, depending on the expected length of the placement and reflecting whether the placement is for the longer term or short-term respite only.

A Carer may put in place certain house rules that everyone sharing the home is asked to keep. This may include, for example, helping with certain household tasks, not playing loud music late at night, or not smoking in the house.

Either the Client or Carer may choose to halt the introductory period at any point, without prejudice. For example if agreement cannot be reached on the house rules, or the client wishes to consider an alternative Carer for other reasons this would be supported without criticism.



An officer from the scheme will write up a Service User Plan with the client. Though personalised to the client, this will typically contain information about:

- The name they prefer to be called by
- Their mobility and health needs including medication
- Their likes and dislikes, for instance food and drink
- Arrangements for keeping them safe in the placement
- Their current interests and new things they may like to do in the future

Clients may be placed for short periods of respite care, or for longer periods, of up to 2 years or more. The terms of each placement will be decided on a case-by-case basis and set down in a Shared Lives Placement agreement, which clarifies the main aim of each placement. This identifies the roles and responsibilities of all concerned parties, including Client, Carer, Shared Lives team, and Care manager.

Other paperwork at time of placement includes a licence agreement and a support/care plan. The support plan will outline any specific assistance for the individual. This may include supervision or training of the client in daily activities, supporting the client in taking medication, and supervising the person in matters of health and safety within the home.

When an emergency placement is made The Shared Lives Scheme undertakes to:

- Make sufficient information available about the client to ensure the safety of the client, Carer and their household
- Inform the client within 1 working day about key aspects of the placement
- Ensure a Placement Agreement is provided and that all other criteria and documentation are met within 5 working days
- Make clear that an emergency placement does not imply a right or requirement to stay in the same placement

Carers are expected to keep a diary about what is happening, which they may encourage the clients to assist with. This should include anything that is important to the client, including their appointments, visitors, and times they are ill. Off site carers are also expected to keep a log showing daily contact with the client and noting where it has not been possible to make contact.

### Safeguarding

Training on Safeguarding vulnerable adults is regularly available for staff and Carers.

This covers the different types of abuse that may be encountered, including physical, sexual, psychological, financial, neglect, discriminatory or institutional. Abuse could be reported directly by the individual, by another concerned party or be observed by changes in behaviour.

The training notes what action must be taken to report and investigate alleged abuse and safeguard the individual, depending on the circumstances and ongoing nature of any risk.

### Moving on

As part of an ongoing review process, a client may be identified as ready to move on from the Scheme into alternative accommodation. This move could be to another form of Supported accommodation, or more independent housing including a home in the private sector. Examples of Client support through this period may include assistance with the Choice Based Letting bidding process, a housing panel nomination, or a period of continued support while they settle in their new home.

A placement may be ended if conditions of the licence or placement agreement are breached. This may include anti-social behaviour, frequent breaches of house rules or accrued arrears. The decision to end a placement in such a case is not taken lightly, and would be arrived at after discussion with the Shared Lives officer and the Care manager. In many cases a warning may initially be given, along with a letter giving 28 days notice. If the situation is resolved within this period, the carer and client may choose to continue with the placement.

Alternatively a client may make a personal decision to move on from the placement. The client would be advised to inform the Carer, Care manager and Shared Lives officer of this decision, with 28 days notice. This is to allow for sufficient planning and any support to be in place, and if necessary to assist with alternative accommodation arrangements. This may include finding an alternative Shared Lives placement.

### Financial assessments

Most clients will be dependent upon benefits for their income. The Shared Lives Officer will assist them to make the relevant application for Housing Benefit. Some of this information will be shared with Supporting People. Carers are paid by the hour for contracted hours of social support provided to the client. The Shared Lives team has a financial banding system for differing levels of support.

Payment will be made to the Carer by any or a combination of the following:

- By cheque or BACS from Housing Benefit dept
- By cheque or BACS through Community and Housing Department
- Directly by the client
- By someone other than this Local Authority. This may include an Appointee/Advocate for the client

Invoicing – Carers will be given blank invoice forms, which they will be shown how to complete. These should be submitted on a monthly basis, signed and dated. This will show information regarding charges for each client, with any deductions for housing benefit, and client contribution, and a final figure required by the Carer for payment. Care should be taken to ensure any individual invoice does not exceed the maximum amount agreed with the Shared Lives team (currently under £5000).

Information on Carer/Client entitlements may be obtained from London Borough of Merton's Welfare Benefits team. Other questions on funding, tax liability, special tax entitlement (including Single Person discount on Council Tax), numbers of client to be supported etc may be discussed with the Shared Lives officer, who will either advise or signpost the Carer to current information sources.

Where money is passed between Client and Carer, these transactions should always be recorded, dated and signed by both Carer and Client, briefly outlining the reason for the money being transferred.

#### Equality and Diversity

The London Borough of Merton is committed to promoting equality of opportunity and social inclusion, promoting good relations between employees, service users and communities of all backgrounds. This includes treating people fairly and not discriminating against them on the basis of age, sex, race, religion, disability or sexual orientation.

#### Complaints and comments

Initially it is hoped that the Client and Carer would be able to discuss any problems that occur. In some instances the client may prefer to approach:

- Their care manager/social worker
- Their Shared Lives worker
- A family member or close friend
- Their Advocate

We greatly value the service provided by Shared Lives Carers. The Shared Lives Scheme aims to support the needs of both Carers and Clients. Where problems arise, Carers are requested to bring this to the attention of the Shared Lives Officer, who will try to find a satisfactory solution. If this is unsuccessful they should contact the Team manager to discuss further. A personal visit can be arranged if required. Should the Carer or Client remain dissatisfied they may choose to make a formal complaint. A complaint form is available from the Shared Lives team.

Shared Lives team  
3<sup>rd</sup> Floor  
Merton Civic Centre  
London Rd  
Morden  
Surrey SM4 5DX

Tel. 0208 545 3900

[www.merton.gov.uk/complaints](http://www.merton.gov.uk/complaints)