



## Mutual Expectations Talk for Housemates

# M.E.T. Housemate Guide

### *A Housemate Compatibility Assessment and Discussion Guide*

by Linda J. Green, MHRD

*SECTIONS:* Site and Financial    Occupancy    Use of the Home    Health  
Housemate Relationships    Housekeeping    Summary and References

**WHY** *use this guide.* In deciding whether or not to share housing, two people are about to make a significant decision affecting their quality of life. This guide can help jump-start both the home owner and home seeker in getting to know each other in terms of living together. An investment of time for a face-to-face talk at the front-end of a homesharing relationship can payoff both immediately for deciding whether to continue the process, and later if they become housemates. After the talk, gathering other data, and using their intuition about a good fit, both the home seeker and home owner can inform the other whether a homesharing agreement is a 'Go' or a 'No Go'. In decision making, the home owner will most likely also use a background check, credit check, and reference check.

**HOW** *to use this guide.* If you are using [silvernest.com](http://silvernest.com), you have already found potential housemate matches and used email to set up a time to meet at the home. Allow about an hour and a half, if possible, for discussion. Either the home owner or home seeker can initiate use of this guide. They can also discuss any questions they have from the Silvernest website. After a walk-through of the home's common and private areas, if both think being housemates is a possible 'Yes' or 'Maybe', use this guide. Do one section at a time; that is, write answers to questions when indicated (and the other questions if you want) and discuss each with the potential housemate. Skip any questions that aren't important to either person at this point in time. (*Option:* take the questionnaire to fill out later, followed by a second meeting or phone or online discussion.) Keep a copy. If using CreditKarma.com, the credit check can be quickly done online during the face-to-face discussion.



## MET Housemate Questionnaire

Name:

Phone:

Date:

Email:

Current mailing address:

### **SECTION 1. WALK THROUGH THE SITE AND FINANCIAL INFORMATION** *(This first subsection is to be explained by the owner.)*

1. Tour the property, look at the new prospective housemate’s private areas and shared common areas, review advantages and disadvantages of the property.
2. Discuss parking, neighbors, neighborhood noises, crime and safety, local stores and services, traffic, road / parking / driveway conditions (such as snow removal), public transportation, localized weather conditions (such as flooding).
3. Who owns the property? What is the history of dealing with the owner?
4. Who maintains the exterior and interior of the property? What maintenance problems exist currently? *(For example, need to get new Internet provider, etc.)*
5. Is the dwelling insured for fire and damages? By whom? Does the owner have homeowner’s insurance? Does the new housemate have or plan to get renter’s insurance?

*(The following items are to be discussed by both the owner and home seeker.)*

6. Where is the prospective housemate living now? Why do you want to move?

7. What are the sequential steps in the homesharing agreement process that the owner, the home seeker, and Silvernest.com (if used) take? Who does what, when, and who pays for what? (*For example, background check, credit check, reference check, other applicants and homes being considered, when each may notify the other of acceptance or refusal*)
8. What amount of expense sharing (similar to rent) is asked of the new prospective housemate? What percentage of utilities is the new housemate asked to pay? (Electric, gas, water, sewer, garbage, maintenance fees, phone, cable or satellite TV, Internet access, etc.) What is the total or estimated amount per month asked of the new housemate? Does that amount vary with the season?
9. Does the owner require a security deposit from the new housemate? If so, how much? Is interest paid? What are the conditions and time of return?
10. Discuss the new prospective housemate’s financial information. One guideline is that homesharing costs should be not more than 30% of net income. Look at a current pay stub, if possible. Consider current monthly net income, monthly expenses (car payments, credit cards, student or other loans, etc.), stability of income, anticipated income gains or losses. Is the new prospective housemate willing to pay for a background check and credit report?
11. Does the owner have sole housemate approval authority? Does the owner require the housemate to be listed on a homesharing agreement (similar to a lease)? When will the new housemate have the opportunity to read and negotiate the agreement?
12. If a new homesharing agreement is negotiated to include the new housemate and the shared expenses or utilities are increased, is the new roommate willing and able to pay additional expenses?
13. On what date are the shared expenses (similar to rent) due? Payable to whom – by way of Silvernest, some form of bank transfer, or by check or cash? Does the owner have a provision for late charges? If so, what is it? When and how are utilities paid?
14. Has the home seeker ever wanted or needed to leave a rental (or been evicted) while the lease or rental agreement was still in effect? Why? What happened?

**SECTION 2. OCCUPANCY**

Write your comments or circle a response, and be ready to discuss the questionnaire in exploring your living preferences with your potential housemate(s).

15.How do you plan to use the home? What are your needs? (examples: a place to party with friends; just a place to sleep and do laundry; a place to do gardening and hobbies; a full-time quiet haven, etc.)

16.What are the top three reasons you want to share a house or want a housemate? (both answer by writing in answers) A. B. C.

17.How many people will live in the home? In what rooms of the home? Which areas are private and which shared/common areas?

18.How long does the owner anticipate living in the home? What time commitment to offer the space is the owner willing to make to the housemate? What time commitment does the owner want from the housemate and is the housemate willing to make?

19.If all is going well with the homesharing, what circumstances might cause the housemate to move out? What would be the effect on the homesharing agreement and the owner?

20.What length of time do you want to get or give as advance notice of any moves?

21. What amount of time do you usually spend at home? (circle a number below)

1 = Seldom, rarely leave

6 = Home body,

1

2

3

4

5

6

22.What typical times and days are you at home? (example, 5 p.m. to 7 a.m. week-days and most of week-ends) What times would each of you be using a common bathroom? Common kitchen? Common living room?

23. What typical travel days and seasons are you away from home? (*example, maybe 4 week-ends a year plus visit family out-of-state for about 1 week most summers*)
24. Would any children or other relatives be visiting the home or staying for a while? What are their names, ages, needs, times and number of days per month they would be at the home? Is length of visits limited in the homesharing agreement or by the owner?
25. Are there any loved ones (such as a significant other, young or adult children or older parents) that the housemate might want to ask to move in on a temporary, urgent basis, if the loved one faced adverse health, financial, or legal conditions (such as illness or broken bone, loss of a job, change of child custody)? How would this affect the housemate and homesharing agreement?
26. What friends would be visiting the home? Discuss the number of friends visiting regularly, how many times a week or month, and any activity affecting the common areas. Discuss any overnight visitors and conditions of their stay.
27. Discuss whether anyone other than the housemate may want a key and whether that’s an option. Who you would want to have a key, why, how long you’ve known them, how reliable they are. Discuss any parts of the home that may be locked off from other parts, why, and who has a key.
28. Do you have any current or anticipated pets or plan to do any pet-sitting? Any pet allergies? Are pets allowed in the homesharing agreement? What are the pet’s care and space needs, indoors and out, and access to the outside? How do you take care of pet waste and noise?

### SECTION 3. USE OF THE HOME

29. Discuss any noisy activities, their location (private or common areas), and how sound travels in the home. If it can be heard by the other, what amount of music/TV/Internet do you play? (circle a number below)

1 = Never

1

2

3

4

5

6= Always

6

30.If it can be heard by the other, what sound level of music/TV/Internet do you like? (circle a number below)

1 = Barely audible

6 = Rock concert

1

2

3

4

5

6

31. If phone conversations and the ring tone can be heard by the other, how often are you on the phone? (circle a number below)

1 = Seldom

6 = Always

1

2

3

4

5

6

32.Do you both have a cell phone and how well does signal reception work in the private and common spaces? If there is a landline, will it be shared? Is there WiFi, will it be shared, and how is the signal strength and speed? Is there cable or satellite TV and will it be shared? Are there subscriptions such as Dish, Netflix or Amazon Prime available for sharing? Is the prospective housemate willing and able to pay for installation and monthly fees or upgrades to existing services?

33.Are you more a night owl or lark/morning person? What sleep and quiet times and days do you need? (*example, 10:00 p.m. to 7 a.m. week-days, 11 p.m. until 9 a.m. on Fridays and Saturdays*)

34.Discuss modesty or partial undress practices in common areas.

35.Discuss your values and practices regarding all forms of smoking, alcohol, recreational drugs in the home, whether in common areas or your private area.

36.What are your recreational / hobby / maintenance activities in the house, garage, yard? Consider each season. (*ex., barbecuing, car washing, model building, oil painting, gardening*)

37. What are your special needs or considerations, such as food or pet allergies, sensitivity to fragrances, use of candles, ability to climb stairs, mobility, balance, hearing loss, memory, needed quiet for meditation practices, etc.

38. What type of food preparation do you usually do, such as cooking from scratch, baking, roasting, gourmet foods, natural whole foods, frozen prepared foods, take-out or deli foods? What kitchen appliances and refrigerator/freezer requirements do you have, need, and are offered?

39. What is the usual home winter heating / summer air conditioning temperature in common and private areas? Any options for additional heating (space heater) and cooling (fan)? Any unusual energy use (water and electricity) by the prospective housemate? Can the housemate paint or attach things to the walls, and how? Can the housemate set aside any unused items, and store them where? Discuss mail and package delivery.

40. Do you plan to operate a business or work on an outside activity from the home? If yes, what are your needs, especially for space, phone, visitors, parking? (*example, on a volunteer committee, have 10 people over once a month and make numerous evening phone calls about two nights a month*). Who would get your phone number and address? Does the homesharing agreement cover running a business from the home?

41. What size, types, and condition of vehicles (or vehicle accessories such as trailers) do you have?

42. Who would park where?

43. Why are you looking for an unfurnished or furnished space? What furniture and items do you already have, and where are they? Would you like any furniture and items placed in any private or common areas? Where?

44. What large or small appliances do you have to be shared or stored?

45. What storage needs do you have? Could they be accommodated on the property? Where? Can you rent an additional offsite storage space?

#### SECTION 4. HEALTH AND WELLBEING

46. While respecting your privacy and comfort level, please share any information that may affect the home seeker’s and home owner’s safety and care while sharing a home. Do you have any diagnoses, temporary or ongoing issues that are pertinent to home sharing, and what treatments are you undergoing for them?

- A. PHYSICAL BODY HEALTH. *Examples*, strength, stamina, flexibility related to self care, housework, yardwork; sight and hearing issues, mobility, ability to climb stairs, able to self-evacuate in case of an emergency, sleep needs, physical therapy visits.
- B. ASSISTIVE DEVICES. *Examples*, hearing aids, CPAP machine, supplemental oxygen, cane, crutches, walker, wheel chair.
- C. MENTAL AND EMOTIONAL HEALTH. *Examples*, brain fog, memory issues, brain injury recovery, brain chemical imbalances, depression, anxiety, psychotherapy visits, early Parkinson’s, early onset Alzheimer’s Disease.
- D. TRAUMA AND RECOVERY. *Examples*, trauma recovery from life challenges such as divorce or death of a loved one, grief process, substance abuse recovery (smoking, alcohol, drugs).
- E. MEDICAL EXPENSE COVERAGE. *Examples*, Medicaid, Medicare, private health insurance, not insured and pay out of pocket, concierge doctor’s payment plan, free or low cost clinics.
- F. NEXT OF KIN. Do you have an emergency contact and/or someone with medical power of attorney? Are they nearby? Please **exchange medical contact information**. What transportation do you use to and from medical visits?

## SECTION 5. HOUSEMATE RELATIONSHIPS

47. With an *ideal* housemate, would you prefer to be: (circle a selection below)

- A. Friendly acquaintances, like neighbors
- B. Companions and friends
- C. Close and caring like family

48. Would you like to share cooking and/or eating meals with your housemate? And/or watching TV/movies or playing cards or games? If so, how often? (write answer below)

49.What amount of **privacy** do you desire? (circle a number below)

1 = None/whole life an open book

6 = Secretive like a spy

1

2

3

4

5

6

50.What amount of **solitude**, being alone, do you desire? (circle a number below) In private area:

1 = Never alone

6 = A hermit

1

2

3

4

5

6

In common areas:

1 = Never alone

6 = A hermit

1

2

3

4

5

6

51. What amount of **companionship** do you desire from the ideal housemate? (circle a number below)

1 = Never see each other

6 = Inseparable buddies

1

2

3

4

5

6

52.What amount of **emotional connection** do you desire from the ideal housemate? (circle a number below)

1 = Distant strangers

6 = Soul twins

1

2

3

4

5

6

53.What are your values, occupation, interests, hobbies? Are there any shared or conflicting values or activities between the owner and prospective housemate?

54.What significant changes have you experienced in the last few months and how are you responding to them? Consider spiritual, mental, emotional, health, family, relationships, moving, work, financial, life style, etc.

55. Discuss decision-making and influence or power. Do you anticipate that one person would be the "head of household," or have more influence? Why? *(example, owns the property, pays more, was there first, is older, is more assertive)*

56. Which decisions would be unilateral, made by one person, and which decisions would be equally shared and consensual? About which issues?

57. What are typical ways you handled conflict or strong, important differences of opinion in the past?

58. How do you propose handling differences with a housemate?

**SECTION 6. HOUSEKEEPING**

59. What is the **tidiness** level ("a place for everything and everything in its place," putting things away, disposing of trash) you desire and usually maintain when you're on your own? *(circle a number below for each room)*

0 = Total mess								6 = Neat & Tidy
Bathroom	0	1	2	3	4	5	6	
Kitchen	0	1	2	3	4	5	6	
Living/dining rooms	0	1	2	3	4	5	6	
Your private area/bedroom	0	1	2	3	4	5	6	
Other:	0	1	2	3	4	5	6	

60. What is the **cleanliness** level (vacuuming, dusting, scrubbing) you desire and usually maintain when you're on your own? *(circle a number below for each room)*

								0 = Health hazard	6 = Hospital clean
Bathroom	0	1	2	3	4	5	6		
Kitchen	0	1	2	3	4	5	6		
Living/dining rooms	0	1	2	3	4	5	6		
Your private area/bedroom	0	1	2	3	4	5	6		

61. How willing are you to accept widely differing levels of **tidiness**? (circle a number below for each area)

In private area:

0 = Can't live with it		6 = No problem
0	1    2    3    4    5    6	

In common areas:

0 = Can't live with it		6 = No problem
0	1    2    3    4    5    6	

62. How willing are you to accept widely differing levels of **cleanliness**? (circle a number below for each area)

In private area:

0 = Can't live with it		6 = No problem
0	1    2    3    4    5    6	

In common areas:

0 = Can't live with it		6 = No problem
0	1    2    3    4    5    6	

**SECTION 7. SUMMARY AND REFERENCES**

65. What three things would you **dislike** in a household or housemate? (write in answer below)

A.

B.

C.

66. What are a few of your "**non-negotiables**," things you absolutely require in a household and housemate or else it's a deal-breaker? (*example, paying their full portion of the shared expenses on time without hassles, no smoking*) (write in answer below)

67. What talents, personal qualities, or services would you like to get or give to the household? Are you willing and able to help out with shopping, cooking, tech support, yard work, handyman work, etc.? Or transportation, housekeeping assistance or personal care? Is there any reduction in shared expenses for assistance? (write in answer below)

68. Anything else you would want to add? (write in answer below)

*Next step:* REFERENCES

Please give name, phone, email address for three people who can speak to your lifestyle, housekeeping habits, reliability, and financial stability.

1. Rental reference: The current or most recent rental landlord or property manager. Or if not a renter, a neighbor or friend familiar with your current residence and how you treat it.
2. Personal reference: A friend who can speak to your personal character and habits.
3. Work reference, preferably your supervisor: Or if retired or unemployed, someone who is familiar with your financial reliability and ability to get things done.

4.

*Thank you for having this discussion. If you become housemates, you can revisit and discuss any of these items over time as you get to know each other and needs of the household or changes occur. This guide was written by Linda J. Green.* Linda is three years older than the oldest Baby Boomer generation who were born between 1946 and 1964. Many of her life experiences, which seemed unique to her at the time, were experienced by many Boomers a few years later as changes amidst national demographic trends. As a Training and Development manager, facilitator, and consultant retiree from the corporate world and academia long involved in team building, she supports harmonious, effective relationships. She holds a Master's degree in Human Resources Development with a BA in Education. Linda has been sharing her home for the last three years with her first housemate found through Silvernest and her MET Housemate discussion guide.

*At Silvernest, we love hearing about your successful homesharing relationships!*