

Trial protocol: Generative AI chatbot “Housing Helper”: A Randomised Controlled Trial

Table 1: Impact Evaluation Summary

Project title¹	Generative AI chatbot “Housing Helper”: A Randomised Controlled Trial
Delivery Partner (Organisation)	Change Please
Evaluator (Institution)	King’s College London (KCL)
Principal investigator(s), and affiliation	Michael Sanders, KCL
Co-Investigators, and affiliations	Julia Ellingwood, KCL Isobel Harrop, KCL
Protocol author(s)	Isobel Harrop Julia Ellingwood Michael Sanders
Impact Evaluation design	Two-arm Randomised Controlled Trial, with an encouragement design
Target Population	Households at risk of becoming homeless, as identified in the LIFT dashboard, primarily by whether they have council tax or rent arrears
Setting	Online intervention with participants from Southwark Council
Number of clusters (if applicable)	N/A
Target number of participants	9,000 households
Primary outcome measure	Relief and main housing duties
Secondary outcome measure (s)	Prevention duties Combined homelessness duties: Prevention, relief, main housing Number of households approaching council for assistance

¹ Please ensure that the project title matches that of the document and that the title clearly identifies the study as a randomised trial design as recommended by CONSORT.

Table 2: Protocol Version History *

Version	Date	Reason for revision
1.0 <i>[original]</i>	15 December 2025	N/A

* Any changes to the research plan or to protocols in the Standard Operating Procedures Manual need to be discussed with CHI and the intervention team prior to any change(s) being finalised. Please update this document where needed to reflect changes.

Table 3: Key Personnel and Team Contributions

Staff	Affiliation	Contribution
Professor Michael Sanders	King's College London	PI, overall responsible for study design
Julia Ellingwood	King's College London	Project Manager, Impact Evaluation and Economic Evaluation lead
Isobel Harrop	King's College London	Implementation and Process Evaluation lead
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Luke Arundel	Centre for Homelessness Impact	CHI responsible, Quality assurance, Contribution to evaluation design
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1. BACKGROUND AND RATIONALE

1.1. Background

Under the Homelessness Reduction Act (2017), local authorities in England have a legal duty to intervene to prevent homelessness and take reasonable steps to relieve it when it occurs. When someone applies to a local authority for homelessness assistance, the authority assesses which duties it owes to that individual. These duties fall into three main categories: the prevention duty, the relief duty, and the main housing duty.

The prevention duty applies to people who are deemed to be “threatened with homelessness,” meaning they are likely to lose their accommodation within 56 days. In these cases, the local authority must assess the individual's housing needs and create a personalised housing plan. The authority then takes reasonable steps to help the person either remain in their current accommodation or secure alternative housing (Shelter England, 2022).

If someone is already homeless when they approach the local authority, or if prevention efforts fail, the relief duty applies. Under this duty the local authority must help the individual secure accommodation that is available for at least six months (Shelter England, 2022), and if the applicant meets the required criteria, the local authority must provide the applicant with interim accommodation whilst they are making inquiries into the homeless application (Shelter England, 2023).

If homelessness continues beyond 56 days, the authority must assess whether the individual qualifies for the main housing duty, which involves providing temporary accommodation until the person is offered settled housing or the duty ends for another specified reason (Shelter England, 2021).

Homelessness duties can be effective in preventing or relieving homelessness in many cases (MHCLG, 2025). In January – March 2025, prevention duty ended for 35,990 households. Of these, just over half (18,520), ended because the household was able to stay in their home, or they had secured new accommodation for six months or longer. Slightly more than a quarter (9,660) of households whose prevention duty ended in January – March 2025 were homeless at the end of the duty and were subsequently owed a relief duty. Relief duties came to an end for 52,670 households. Of these households, just over a third (16,410) had their duty end because they had secured accommodation for at least six months. A little more than half (27,000) of households whose relief duty came to an end were homeless at the end of the duty, and their local authority would have to assess whether a main housing duty would be owed. In January – March 2025, 13,120 households had their main housing duty come to an end. Of these households, 77% (10,190 households) accepted an offer of settled accommodation. On 31st March 2025, 131,140 households were in temporary accommodation.

A large amount of money is spent on homelessness services, and the amount spent in real terms continues to increase: in England, local authority spending on homelessness services increased from £1.3 billion in 2010/11 to £3.1bn in 2023/24 in real terms (Hurst, Teixeira, and Davies, 2025). Spending increasingly large sums of money does not seem to be

addressing the underlying causes of homelessness to prevent it from occurring in the first place, as the 131,140 households living in temporary accommodation on 31st March 2025 is the highest number on record (Shelter England, 2025a).

As demand for homelessness services has increased, local authorities have been compelled to spend a larger amount of their budgets on acute homelessness services, at the expense of programmes to prevent homelessness, or to help people move out of homelessness. Temporary accommodation, the most acute of homelessness services, accounts for £2.4bn out of the £3.1bn spent by English local authorities on homelessness services in 2023/24. This leaves just £0.7bn for all preventative and recovery programming (Hurst et al., 2025).

A lack of funds for homelessness prevention programmes means that in order to get support from the council, people usually need to qualify for a prevention duty, i.e. they need to be at risk of becoming homeless in the next 56 days (Shelter England, 2025b). This means that earlier opportunities to prevent homelessness are being missed (Mackie, Fitzpatrick, and Morris, 2024).

Housing advice and support given well before a crisis point may be effective in preventing homelessness. Merritt and Davies (2023) ran a pilot with Maidstone Borough Council, where 650 households were identified as being at risk of homelessness, and council officers proactively called 260 of these households to discuss support options that could be appropriate for them. Maidstone reported that the pilot was a success, with 0.4% of the households that were contacted by officers presenting as homeless in the year of the pilot, compared with 40% of households that they did not contact. However, we cannot necessarily attribute this effect wholly to the intervention, as the comparison group was created by council officers having insufficient capacity to contact all households, rather than by randomising to assign treatment or control status.

Preventing homelessness by intervening with advice and support before a crisis point creates better outcomes for people, as they avoid the trauma of coming close to being homeless, and better outcomes for local authorities, as they would avoid paying for an expensive stay in temporary accommodation. This kind of advice is available at Citizens Advice centres and online, but may be difficult to access for a variety of reasons, such as language barriers, stigma around financial and housing difficulties, computer literacy, and problems translating advice into a clear plan of action (Placzek et al., 2021).

AI chatbots may be well-placed to overcome some of these challenges and be able to get high-quality, actionable housing advice to people who need it. Research into the use of AI chatbots in the public sector is still in the relatively early stages. A survey conducted by the Local Government Association found that of the councils that responded, almost all were “using or exploring AI”, and half of these respondents were at the beginning of their exploration phase. Just 14% of councils surveyed reported that they were making some use of AI (Local Government Association, 2025). The UK Government’s Digital Service conducted research in 2024 to test an AI chatbot which was intended to help people to find the information they needed on GOV.UK, the official UK Government website (Gregory et al., 2024). Nearly 70% of users found the responses useful, and just under 65% were satisfied with their user experience. Overall, answers did not meet the level of accuracy needed for a government website like GOV.UK. Although research and testing of AI chatbots in a public

sector setting are still at an early stage, the potential cost savings and improved user experiences that AI chatbots could bring mean that the government is investing heavily in the technology, with more than £3.35bn being spent on AI since 2018 (Coates, 2025).

So far, there haven't been any studies looking into the efficacy of an AI chatbot in delivering housing advice, but there are a range of studies looking at the efficacy of AI chatbots in other fields, particularly in mental health. A recent systematic review and meta-analysis of 18 randomised controlled trials demonstrated promising results for therapy AI chatbots in reducing anxiety and depression symptoms (Zhong, Luo, and Zhang, 2024). Other experimental studies have identified issues with using AI chatbots, for example with the chatbot showing stigma towards people who present with mental health conditions and responding inappropriately to common situations in therapy settings (Moore et al., 2025).

The significant resources invested in AI, combined with its potential to improve access to support and its possible drawbacks, warrant an investigation into whether AI chatbots are a useful means of communicating housing advice. Hauser et al. (2025) underline the need for rigorous study to effectively differentiate between the positive and negative impacts of AI technologies, rather than implementing them without sufficient testing.

1.2. Rationale

The current research looks to evaluate Change Please's Housing Helper. Housing Helper is an AI chatbot which helps users to assess a user's situation, offers targeted housing advice, and connects users to relevant resources and services. Housing Helper can also draft custom letters and emails, for example letters to a landlord asking for a temporary rent reduction or flexible payment plan in response to financial difficulties, or letters to Bailiffs to appeal for consideration of mitigating circumstances. Housing Helper works in 55 languages and can translate letters and documents to make them accessible for people with English as an additional language.

This evaluation will assess Housing Helper as an intervention to reduce the likelihood that users are owed a homelessness duty by their local authority, and to understand how Housing Helper is used in practice, and the mechanisms underlying this potential change.

2. PROJECT SUMMARY

2.1. Project Description

The objective of this project is to evaluate the impact of a generative AI chatbot, Housing Helper, to: reduce the number of relief and prevention duties owed to households at risk of becoming homeless; reduce Local Authorities' (LA) spending on crisis response; and divert LA spending toward prevention (i.e. through the implementation of Housing Helper). The research will consist of an Impact Evaluation (IE), taking the form of a Randomised

Controlled Trial with an encouragement design, accompanied by an Implementation and Process Evaluation (IPE) and an Economic Evaluation (EE).

The intervention is being delivered by the charity Change Please, in partnership with Southwark Council. The evaluation is being funded by the Evaluation Accelerator Fund from the Cabinet Office Evaluation Task Force. The funds and overall project are managed by the Centre for Homelessness Impact (CHI), and the evaluation work is led by the Policy Institute, King's College London (KCL).

The IE takes the form of an individually randomised controlled trial, with the randomised unit being households sourced from the Low Income Family Tracker (LIFT) dashboard, a data platform from Policy In Practice used by local authorities to identify potentially vulnerable households and run targeted campaigns. Participants will be those living within the Southwark borough of London, who are considered at risk of homelessness, but are not currently in temporary accommodation.

Households will be randomly selected to receive encouragement messages over email and SMS, which will prompt them to access Housing Helper, a generative AI chatbot that can deliver housing advice, interpret letters received from landlords or bailiffs and generate reply letters, offer support in multiple languages, and connect users with the council and other organisations for help. The users will access Housing Helper as a web application through their internet browser, via a password-protected personal account.

Once in the application, users will see a chat window, accompanied by some tools in the left and right panels, including an option to upload documents, track action items, and information on how to get help with the tool. In the chat window, Housing Helper will ask how it can help, and users can reply via typed text or a microphone (in the case of the latter, the spoken words will show up in the chat screen). The conversation between the user and Housing Helper will show up on the screen in dialogue form with the most recent messages at the bottom, similar to other text messaging tools such as SMS or WhatsApp.

Based on a few initial questions about the user's housing situation, Housing Helper will triage users into risk categories (Crisis, High, Medium, and Low) that correspond to their predicted likelihood of becoming homeless, based on the user's self-reported housing situation. Depending on their assessed risk level, users will either be referred to a Southwark housing officer or provided with tailored advice.

The primary outcome is relief and main housing duties (pooled together), with prevention duties as a secondary outcome measure. These measures will be collected from Southwark Council administrative data, and KCL will use Intention to Treat (ITT) analysis to estimate effects of the intervention, comparing outcomes in the treatment group (including compliers and non-compliers) with outcomes in the control group. If possible, and as an exploratory analysis, KCL will also run a Complier Average Causal Effects (CACE) analysis, to understand the local average treatment effect just for compliers. For this analysis, compliers are defined as users who access Housing Helper and use it for at least four minutes. We will discuss compliance in greater detail later in the protocol, see section 6.2.2.

Box 1. Explanatory notes on IE design: ITT vs CACE, Expected direction of effects

The reasoning for making ITT the primary analysis over CACE is twofold: first, we expect that our encouragement (i.e. emails and SMS to households) will violate the exclusion

restriction for CACE identification, which requires that the encouragement affects the outcome only through the treatment (here, use of Housing Helper). Households who receive these encouragement messages may decide to skip using Housing Helper and reach out directly to Southwark Council or other organisations for help, thereby impacting their outcomes. Second, ITT analysis more closely reflects the “real world” application of a tool like Housing Helper: a local authority that is considering deploying this tool will similarly need to encourage residents to use it; whether or not Housing Helper discernibly improves outcomes on average, across all at-risk residents, is likely of more policy interest than just considering outcomes for a subset of residents who comply. That said, there are risks to just running an ITT analysis: given that we expect compliance rates to be quite low (<20 per cent), we risk diluting the effect to be point that it cannot be detected. That is why we are also proposing to run CACE as well, but as an exploratory analysis.

Further, there is some ambiguity as to the direction of the effect of Housing Helper, with sound arguments both for increasing or decreasing the number of homelessness duties owed by Southwark Council. For instance, a greater number of households understanding their housing rights and the Council’s duty to help prevent them from becoming homeless as a result of engaging with Housing Helper may lead to more households approaching Southwark Council for help and then being owed a duty. Alternatively, engaging with Housing Helper may provide users with the knowledge and support they need to resolve any housing issues they may have before they reach the point where they would be owed a homelessness duty, and therefore Housing Helper would reduce the number of duties owed by the Council. Because of this directional ambiguity, we are separately analysing prevention duties from relief and main housing duties, with the former being more ambiguous in expected direction, and the latter being a more involved, serious intervention that we would expect Housing Helper will decrease.

The IPE will aim to assess possible mechanisms of change, including how specific actions executed using Housing Helper lead to intermediate outcomes such as rent flexibility or successfully challenging an eviction notice, what mechanisms explain earlier support for high-risk users, and whether there are differences in the mechanisms of change for different sub-groups of users.

The IPE will also aim to capture barriers and facilitators to using Housing Helper, user perceptions, and unintended consequences of its use.

The economic evaluation (EE) will estimate the chatbot’s cost effectiveness through cost benefit analysis, using the Greater Manchester Cost-Benefit Analysis (GMCBA) model according to the latest Green Book guidance (March 2022). The GMCBA model takes into account the costs, outcomes, and cashability assumptions associated with an intervention, and produces economic and financial cases for the intervention. It brings together more than 1,100 cost estimates to provide an accurate estimation of the costs associated with the intervention. The EE will consider costs such as license fees, staff time, any fixed costs, and messaging and comms; and compare with the chatbot’s benefits, including diverting spending from crisis response and allocating duties, and reducing time spent supporting each household.

Following the guidance of What Works, Faster (Sanders & Whelan, 2022), this study incorporates viability “gateways”. One gateway will be if we do not observe at least seven per cent of participants complying with the treatment, we will end the study. The reasons for this

are practical, both from a trial resources perspective and from an implementation perspective. The tool is only valuable if people can be successfully encouraged to use it; if we cannot convince a sizable contingent of households to try the tool voluntarily, there is little point in testing it to determine effectiveness. More to the point, we also need to have a sufficiently powered study in order to detect an effect, which means we need a sufficient sample of households complying and taking up treatment. The other gateway is that the EE will only be run if a significant effect is found for the primary analysis of the impact evaluation.

2.2. Study Triangulation

The three evaluation strands—the IE, the IPE, and the EE—cover different facets of determining the intervention’s overall efficacy. Importantly, the IE should help roughly identify the number of prevention and relief duties avoided because of the chatbot, which can be used to estimate the cost effectiveness in the EE, by considering cost per unit of reduced duty. The IPE will provide essential contextual information for scaling implementation, as well as identifying fixed and variable costs related to implementation, thus informing the EE.

3. STUDY TIMELINE

Table 4: Study Timeline

Strand	Staff responsible/ leading	Activity	Dates
Project inception	KCL, Change Please, CHI, Southwark Council	<ul style="list-style-type: none"> • Theory of Change, protocol drafting • KCL Ethics submission • Background research • Drafting and publishing of privacy notice • Development of research materials: User surveys, topic guides, encouragement messages 	July – November 2025
Trial launch	Southwark Council, Change Please, CHI	<ul style="list-style-type: none"> • Identification eligible households • Randomisation of participating households • Encouragement messages sent to treatment households over email and SMS 	November 2025
Data collection and monitoring	Southwark Council, Change Please, KCL	<ul style="list-style-type: none"> • Risk triage and app usage monitoring data collected by Change Please 	Nov 2025 – January 2027

		<ul style="list-style-type: none"> Qualitative work (surveys, interviews) 	
Compliance gateway	KCL, Change Please	<ul style="list-style-type: none"> Change Please provide numbers of complier participants (i.e. those who signed up for an account and used the tool for 4+ minutes) Decision is made whether to continue the study 	January 2026
Interim report to ETF	KCL, CHI	<ul style="list-style-type: none"> Review of methods and data collection for trial Discuss any preliminary findings from qualitative work 	March 2026
Outcome data collection + transfer	Southwark Council, KCL	<ul style="list-style-type: none"> Collection of IE outcome data on duties owed and contacts with council Collection of EE data 	February 2026 – February 2027
Analysis and write-up	KCL	<ul style="list-style-type: none"> Analysis and triangulation of findings across IE, IPE, EE 	Feb – Aug 2027
Peer Review, Publication	KCL, CHI	<ul style="list-style-type: none"> Peer review, QA 	Aug – Oct 2027

4. INTERVENTION

4.1. Intervention and Comparator

The intervention of interest is Housing Helper, a chatbot developed by Change Please in order to provide timely, relevant, and useful housing advice as a preventative measure against Housing Helper operates on a Retrieval-Augmented Generation (RAG) system that sits above a Large Language Model (LLM). Housing Helper only uses publicly accessible, authoritative, and ethically approved sources from the predefined list below:

- Shelter
- Advice Now
- GOV.UK
- Law Works
- Citizens Advice
- Legislation.gov.uk
- The user's local authority website (for this research, Southwark Council)

The sources are ranked based on how recently they have been updated: more recently updated websites are ranked higher. Further, Housing Helper is designed with localisation in mind, drawing from sources that are relevant to the user's location. Information also live-updates as source websites are updated. Housing Helper utilises human monitoring to

improve accuracy and reliability and has been thoroughly tested: both in the field on Change Please's outreach buses, with monitoring by a Change Please associate, and by the evaluation team and the CHI lived experience associates. This approach aims to reduce the likelihood of hallucination or misinformation, though the risk of this and incident rates of hallucination will be assessed through the IPE.

Households that meet the participant criteria and are randomised to be in the control group will receive the following email from Southwark Council:

Hello,

Southwark Council offers housing support services to residents who may need them. You can find more information and advice on our website at <https://www.southwark.gov.uk/housing/housing-support>.

Please get in touch if you need any further support.

You can find more information about how we handle your personal data in our Privacy Notice here: <https://www.homelessnessimpact.org/projects/ai-chatbot-to-offer-housing-advice>

Households that meet the participant criteria and are randomised to be in the treatment group will receive a set of encouragement messages over email and SMS, with the first email coming from Southwark Council via the gov.notify platform, introducing the offer and Change Please as a partner. A subsequent invitation email from Change Please will contain a unique sign-up link, addressing the household main contact. The first contact is being made by Southwark Council in order to build trust with participants and hopefully make it less likely that they mistake the Change Please outreach as spam. See a draft of this first encouragement email below:

Hello,

We're happy to let you know that you've been chosen to take part in a new pilot project. This project will test a housing advice tool powered by AI, created with the help of *Change Please*.

Change Please is a social enterprise that helps people who are homeless or at risk of becoming homeless. They offer jobs and training so people can rebuild their lives and become independent. Their work makes a big difference in the community.

The new tool will make it easier for residents to get advice and support. It will give information about housing and point you to services from the council and our partners in the borough, using Artificial Intelligence.

What will happen?

You'll get an email from *Change Please* in the next few days.
The email will have a secure link and instructions on how to use the tool.
Your feedback will help us improve the service.

If you don't want to take part:

You can opt out at any time. Just reply to this email with the subject line **OPT OUT** or email data.housingsolutions@southwark.gov.uk.

You can find more information about how we handle your personal data in our Privacy Notice here: <https://www.homelessnessimpact.org/projects/ai-chatbot-to-offer-housing-advice>

Shortly after this initial email is sent, Change Please will email treatment group participants with their unique link to the Housing Helper. The draft of this email is provided below:

Get personalised housing advice whenever you need it

Southwark Council, in partnership with Change Please, has launched a new AI-powered Housing Advice Chatbot to offer 24/7 support.

This isn't just any general advice tool, it's:

- **Immediate & Private:** Get trusted, up-to-date guidance any time, without a phone call or appointment. Your conversations stay private unless you choose to share.
- **Local & Specific:** Receive advice that is tailored to Southwark's rules and your exact rights. The AI-powered tool creates custom documents and emails for your case, not just generic advice.
- **Personal:** Get support in 55 languages and instantly check your eligibility for housing benefit and priority housing.

[ACCESS THE 24/7 HOUSING CHATBOT]

You can find more information about how we handle your personal data in our Privacy Notice

here:

<https://www.homelessnessimpact.org/projects/ai-chatbot-to-offer-housing-advice>

This unique sign-up link will take participants to an account creation page, with their name and email pre-populated and un-editable. To complete sign-up, the participant only needs to supply their postcode (to help verify they are who they say they are), create a password, and agree to the User Terms & Conditions. If the prospective user is not the referred person (i.e. their information does not match with the pre-populated fields in the account creation page), they can click a link to a generic account creation page, where they can supply their name, email address, postcode, age (category drop-down), create a password, and agree to the User Terms & Conditions. These fields, particularly the postcode, will be used to match these users to households later on to determine compliance (see 6.2.2).

After the initial invitation email, and depending on the sign-up rates, Change Please will follow up with a series of invitation emails, SMS, and/or WhatsApp to boost sign-ups, delivered through the marketing platform HubSpot. As we cannot predict how successful this campaign will be, and because success of the trial depends on user compliance, we are taking an iterative approach to encouragement messages and may draw upon other modes of contact such as phone calls where needed. All messages will clearly show how participants can unsubscribe from further contact.

Once users are signed up to the platform, they can begin interacting with Housing Helper via prompts, using either a smartphone, computer, or other internet-enabled device.

First, Housing Helper will pose some questions conversationally; in order to gather information about the user's situation and understand the challenges they are facing with respect to housing. These early assessment questions are derived from statutory homelessness prevention criteria, contained in the Homelessness Reduction Act 2017. Based on the answers to these questions, the tool triages users into risk categories: Tier 1 (Crisis), Tier 2 (High risk), Medium risk, and Low risk. See table 6 for further description of the risk categories. The user experience then proceeds from these risk categories, with Tiers

1 + 2 (Crisis and High Risk) being referred to Southwark Council for further support, and Medium and Low risk users being offered tailored prevention advice and self-help resources. The tool can also interpret uploaded letters from landlords or bailiffs, generate response letters, and interact with users in 55 global languages.

Households are randomly selected to receive encouragement messages that will include links to Housing Helper. Those who are randomly selected to the control group make up the comparator; these households will only receive an email from Southwark Council signposting them to pages of the council's website with housing information. The control group will not directly receive information about or links to Housing Helper, although there is a small chance of contamination if a member of the treatment group shares their link with a member of the control group (we deem this to be unlikely). The control group will receive business as usual support from Southwark Council, which depending on their situation, may mean no support or contact beyond the initial signposting email. More information on the "business as usual" services can be found Appendix E, and a short summary of BAU activities can be found below, under 4.2 Business as usual.

Households in the control group will not be contacted to take part in any research activities. This decision was made for two main reasons: first, the information we could gather from this group is of limited value to the IE; and second, self-selection effects will likely be substantial, meaning we are not comparing like with like. To the first point, our primary outcome measure is derived from administrative data, without the need for triangulation with self-reported survey data. Thus, there is limited utility in approaching this group for additional data collection. To the second point, we believe there will likely be a lack of comparability between those who complete the survey in the treatment group and those in the control group, as well as a lack of comparability between those in the control group who complete the survey vs those who do not. This lack of comparability makes analysis tricky to carry out – we would be unable to draw reliable conclusions from this group, given that they likely differ from our other participant groups in ways that are unobservable. Finally, while we could try to assess the effectiveness of Housing Helper as an information treatment by measuring participants' knowledge of their rights and available housing resources in the form of a survey, undertaking this would risk contamination, by "treating" those in the control group with information that may prompt them to reach out to the council and impact our effect estimation.

At the end of the trial period, Southwark Council will tally prevention, relief, and main housing duties owed to households in the treatment and control groups; all being well, any difference in number of duties owed should be attributable to being encouraged to take up the intervention.

Table 5: TIDieR Framework²

Brief Name Provide the name or a phrase that describes the intervention	Housing Helper – an AI-enabled chatbot
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² BMJ 2014;348:g1687; doi: <https://doi.org/10.1136/bmj.g1687>

<p>Why: Describe any rationale, theory, or goal of the elements essential to the intervention</p>	<p>Housing Helper aims to prevent homelessness before it occurs, by providing targeted housing advice and support for those who may be at risk, but haven't yet reached a crisis point. Many people are not aware of their rights or the services available to them to allow them to remain in their homes. By offering this advice in a personalised way, accessible 24/7, and in multiple languages, Housing Helper can provide much greater reach than human teams can. Housing Helper can also help users who are at-risk to help themselves, by helping them to prepare paperwork, draft letters, and understand their options. Further, Housing Helper may be able to circumvent the stigma that may be attached to approaching a human for help.</p>
<p>What (Materials): Describe any physical or informational materials used in the intervention, including those provided to participants or used in intervention delivery or in training of intervention providers. Provide information on where the materials can be accessed (such as online appendix, URL)</p>	<ul style="list-style-type: none"> • Targeted advice, available 24/7 and in 55 global languages. Personalised support pathways (interactive checklists, decision trees) • Direct referral to Southwark housing options team (high risk cases) • Custom letters and emails (requests to landlords for temporary rent reduction or flexible payment; letters to bailiffs to appeal) <p>Technology based on a Retrieval-Augmented Generation (RAG) working on top of an LLM. The RAG system will reference Shelter, Advice Now, GOV.UK, Law Works, Citizens Advice, Legislation.gov.uk, and the user's local authority website (for this research, this will be Southwark Council).</p>
<p>What (Procedures): Describe each of the procedures, activities, and/or processes used in the intervention, including any enabling or support activities</p>	<ul style="list-style-type: none"> • Participants assigned to treatment will be encouraged to use Housing Helper via SMS and email • Housing Helper will be accessible

	<p>via a link, browser and mobile compatible.</p> <ul style="list-style-type: none"> • Users will complete a user sign-up flow, using an email address. • Housing Helper will gather information from participants via a set of assessment questions to generate a risk score. • During information gathering, participants can upload documents which can be read and interpreted by Housing Helper • Based on risk score and info gathered, Housing Helper will offer targeted advice. • Housing Helper can be interacted with via voice or a keyboard. <p>Users can use Housing Helper as long as they like, over multiple sessions if they choose. Since their sessions are associated with a login, they will be able to reference resources or chats as they need. They will lose access once the intervention period is over (12 months post-launch).</p> <p>Triage process:</p> <p>Crisis risk:</p> <ul style="list-style-type: none"> • If deemed crisis risk, Housing Helper will tell them that they should contact the council and will offer to do so. The participant has to consent to this referral. • If they consent, Housing Helper automatically populates an email message, providing an overview of the participant's situation and contact details, which is sent to a dedicated council inbox. <p>High risk:</p> <ul style="list-style-type: none"> • Similarly for crisis risk, Housing Helper will prompt people to get in touch with the council. <p>Low and medium risk:</p>
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	<ul style="list-style-type: none"> They will not be prompted to contact the council, and none of their information will be shared.
Who provided: For each category of intervention provider (such as psychologist, nursing assistant), describe their expertise, background, and any specific training given	<p>Change Please</p> <ul style="list-style-type: none"> Train Housing Helper to categorise risk, respond accordingly, and escalate crisis cases to a human. Designed to be conversant in 55 languages, read uploaded documents and interpret them, draft letters. Draft encouragement messages to promote Housing Helper adoption; send rounds of encouragement messages over email and SMS. <p>Southwark Council</p> <ul style="list-style-type: none"> Trained Southwark housing officers (in case of crisis). These individuals will be trained in how to use Housing Helper and to receive referrals from it. Southwark IT professionals integrate Housing Helper into existing systems.
How: Describe the modes of delivery (such as face to face or by some other mechanism, such as internet or telephone) of the intervention and whether it was provided individually or in a group	<p>Encouragement messages sent over email and SMS, and interaction with Housing Helper occurs online, via a web interface/platform.³</p> <p>Housing Helper is intended to be used by individuals or individual households.</p>
Where: Describe the type(s) of location(s) where the intervention occurred, including any necessary infrastructure or relevant features	<p>Interaction with Housing Helper requires participants to have access to a smartphone, computer, or some other internet-enabled device. Naturally the tool also requires an internet connection or a data plan, as well as user comfort with using a web interface (either via spoken prompts or typing).</p> <p>Participating households must reside within Southwark borough area of London; thus we anticipate most use to</p>

³ Housing Helper can also be used by those who visit the Southwark Council housing team in person (though this mode of delivery is not relevant for this trial).

	be within Southwark.
When and how much: Describe the number of times the intervention was delivered and over what period of time including the number of sessions, their schedule, and their duration, intensity, or dose	Compliance is being defined as a user setting up an account and using the tool for at least 4 minutes. Users can return to and reference resources within the tool as frequently and for as long as they like.
Tailoring: If the intervention was planned to be personalised, titrated or adapted, then describe what, why, when, and how	<p>The nature of Housing Helper is that it is personalised and responsive to the service user's individual situation. It does this through the assessment questions that are part of the risk triage process, as well as any other information the user chooses to share.</p> <p>Change Please is also adapting Housing Helper to allow repeat sessions via a login, as well as incorporating Southwark-specific resources into its RAG, so participants will be directed to sources most relevant to them as Southwark residents.</p>
Modifications: If the intervention was modified during the course of the study, describe the changes (what, why, when, and how)	To be discussed at the reporting stage
How well (Planned): If intervention adherence or fidelity was assessed, describe how and by whom, and if any strategies were used to maintain or improve fidelity, describe them	<p>Intervention fidelity is assessed by Change Please, per usage metrics including time using, actions taken (uploading/downloading documents), and future logins.</p> <p>While we define compliance to be four minutes of use, it is worth exploring other thresholds or definitions of fidelity.</p>
How well (actual): If intervention adherence or fidelity was assessed, describe the extent to which the intervention was delivered as planned	To be discussed at the reporting stage

4.2. Business as usual (BAU) support

Southwark Council Housing Needs Service provides advice and assistance to Southwark residents who are experiencing housing issues, are threatened with homelessness, or are

rough sleeping (with the former two groups being in scope for this trial). Housing Needs consists of multiple teams offering different expertise, spanning housing advice and support, employment and debt advice, and referrals for support with mental health, domestic abuse, and rough sleeping.

Southwark residents who are experiencing housing issues are invited to contact Housing Needs via phone, email, or visiting their office in person. Alternatively, if they are receiving support from another service, that organisation can complete a referral to Housing Needs on their behalf. At first point of contact, users of Housing Needs will work with the Gateway customer service team, who can provide tailored advice in response to the user's identified needs. The Gateway customer service team can also make contact with the user's landlord, family or friends to mediate on the user's behalf, in order to prevent homelessness, as well as refer users to a specialist team for further assistance.

In some cases where eligibility criteria are met and housing is available, Housing Needs can also seek to provide emergency accommodation for the user, whether within Southwark or elsewhere as needed. Where this is not possible, users will need to make arrangements with family or friends to stay while they are looking for private rented property.

The first step in accessing emergency accommodation is to complete a homelessness assessment, which requires users to submit documentation to verify identity, a proof of address, financial information, medical information, family and dependents, and documentation related to the housing problem. After the homelessness assessment, a caseworker may be assigned to the user, and a personal housing plan may be issued, which outlines the duties owed to the user by the council. Alternatively, if eligibility for a personal housing plan is not met, a letter will be issued explaining the reasons behind the decision.

The substantive differences between the business as usual approach and the Housing Helper intervention are (1) the 24/7 access to tailored advice and services, like drafting a letter to a landlord, (2) the automated risk triaging which seeks to identify high risk cases for urgent support, (3) the referral mechanism to the Housing Needs team in those crisis and high risk cases, and (4) the automated support for users with collecting the necessary information and paperwork, which aims to better prepare users of Housing Needs for interactions with the council. After the point of contact with Housing Needs, the support offered to Housing Helper users and BAU users will look similar, from doing the homelessness assessment through to setting up personal housing plans.

4.3. Theory of Change

An initial theory of change is provided below:

Change Please AI– Theory of Change



KING'S
College
LONDON

Situation

Local authorities have a duty to offer advice related to housing. The number of people approaching local authorities for housing-related advice and assistance is increasing and putting pressure on LAs. This is particularly true when people approach the local authority when they are in crisis, at which point interventions are less effective and more costly. There may be opportunities to intervene early to prevent people from reaching a crisis point.

Aims

- For low-risk individuals, offer targeted advice/assistance earlier than they would typically receive it to divert them from the Local Authority. Advice will be given on housing rights and the support people are entitled to, while assistance will be given requesting rent reductions and payment flexibility, requesting payment plans for debts, and identifying incorrect Section 8/Section 21 notices
- For high-risk individuals, help them to receive support from the Local Authority more quickly by effectively triaging them and referring them to the LA
- Reduce the number of prevention and relief duties across all user types
- Increase the number of people who challenge their eviction notices across all user types
- Increase the number of people who take up support – from the council or other organisations
- Ensure that the advice is accessible to as many people as possible, particularly to people in arrears, survivors of domestic abuse, people with English as an additional language, care leavers
- Reduce time spent and costs for Local Authorities

Inputs

Activities

Outputs

Outcomes

Impact

Process

Impact

- LA knowledge of potential users
- Retrieval Augmented Generation (RAG) system
- AI training materials (websites including Citizens Advice, GOV.UK, Shelter, Southwark Council; Section 21/Section 8 notices)
- AI persona development
- Framework for continuously monitoring Housing Helper to ensure efficacy and safety
- Risk categorisation framework for triaging users
- Language translations
- Referral pathway mechanism with LA

- Building Housing Helper
- Preparing LAs to respond to high-risk users
- LA sends an email and text messages to users to get them signed up
- Change Please sends emails and text messages to users to encourage them to use the tool or return to the tool
- Encouraging people to use Housing Helper (A/B testing messages)
- Building dashboard for council use
- Continuous monitoring of Housing Helper, comprising bias detection, stakeholder feedback, performance monitoring, and quarterly review of ethical compliance

- All users:**
- Users respond to engagement messages and reminders, clicking the link to access the tool
 - Users create an account
 - Users are risk-triaged and high-risk users are referred to the LA to receive appropriate support
 - Users engage with Housing Helper meaningfully, on multiple occasions to revisit resources
- Low to medium-risk users:**
- Users are accessing customised, accessible, understandable, and useful housing advice
 - Section 21/Section 8 notices are uploaded to Housing Helper, custom advice and populated response letters are produced
 - Users are sending letters to landlords asking for rent reductions/payment plans
 - Users with English as a second language can interact with the tool in other languages, which the tool can use accurately and naturally
 - Housing Helper connects users to local organisations
 - Users use other features offered by Housing Helper (e.g. benefit calculator tool)
- High risk users:**
- Users are flagged to a trained housing worker who is able to respond quickly to crisis

- All users:**
- Users feel they are receiving high-quality and useful advice
 - Users access specialist services (e.g. domestic abuse/mental health services)
 - Users with English as an additional language confidently send and receive letters to landlords in English, with translations in their primary language
 - Users access advice and/or assistance earlier than they would have without using Housing Helper
 - Users feel comfortable engaging with Housing Helper
 - Users in different age categories, with different literacy levels, accessing the tool in English vs. other languages, and with different tenancy types will have different outcomes as a result of using Housing Helper.
- Low/medium risk users:**
- Users are granted rent reductions
 - Users are granted payment plans for rent arrears, council tax arrears, other debts
 - Users approach the council/other organisations for assistance
 - Users challenge Section 21/Section 8 notices
- High risk users:**
- High-risk users receive timely support they need from the LA
- LAs:**
- LA time shifts from reacting to emergency cases, to time working with users before the crisis point
- Possible unintended consequences:**
- Users more likely to approach the council for assistance places strain on services
 - Users become over-reliant on Housing Helper
 - Users access non-council services over council services

- Fewer people become homeless
- Fewer people are owed a relief duty or a main housing duty, saving the LA money
- For lower-risk users, fewer people are owed a prevention duty, which saves money for the LA
- For high-risk users, more people are owed a prevention duty because they accessed help earlier, saving the LA money in the long-term via fewer relief/main housing duties
- LAs divert spending from crisis response to prevention

Rationale and Assumptions

- The training materials used to develop Housing Helper are accurate
- Housing Helper will be able to give trustworthy advice and will not hallucinate
- The triage system effectively categorises users
- Encouragement messages will reach users
- Users remember Housing Helper when they need it
- Users have access to a phone/computer when they need to access Housing Helper
- Users will have the technical skills to effectively use the tool, including writing effective prompts and downloading/editing/saving documents
- People answer the questions asked by Housing Helper accurately

- People trust Housing Helper enough to use it and give it sensitive data
- Users spend enough time with the chatbot for tailored and helpful advice to be delivered
- People trust the information given by Housing Helper to action it
- Asking for a rent reduction/payment plan for debts results in users receiving the rent reduction/payment plan
- Rent reduction/flexibility, payment plans for debts, connection to services, and/or additional support is sufficient to prevent homelessness

4.4. Intervention Dates

The encouragement messages will be sent over a three-month period: November 2025 to January 2026. During that time, households can sign up for and use Housing Helper. If the compliance gateway threshold is met at the end of January, households can continue to sign up and use Housing Helper until end of January 2027, when primary and secondary outcome data on homelessness duties will be collected for treatment and control households.

5. IMPACT EVALUATION

5.1. Aims, Objectives and Hypotheses

5.1.1. Aims and Objectives

This IE aims to estimate the impact of using a generative AI-enabled chatbot Housing Helper to reduce main housing and relief duties owed to households living in Southwark who have been identified as at-risk and could benefit from receiving targeted housing advice, as identified in the LIFT dashboard.

The primary aim of the IE is to quantify this estimated effect on reducing homelessness duties among households that are at-risk but are not yet receiving housing-related services by Southwark Council, through a randomised encouragement trial. Effects will be estimated for those in the treatment group (both those who comply with the treatment and those that don't), comparing those outcomes against those in the control group, with outcome measures taken up to a year after the end of the encouragement phase (January 2027).

The secondary aim of the IE is exploratory in nature, to understand how use of Housing Helper impacts the types of support Southwark housing officers provide and the amount of time spent with Housing Helper users. Here, we are exploring whether Housing Helper increases the number of households reaching out to Southwark Council for help, whether Housing Helper leads to households reaching out sooner, i.e. before the crisis point, and whether Housing Helper creates efficiencies in these interactions by preparing households with relevant information and specific requests before meeting with housing officers.

5.1.2. Research Hypotheses

Primary and secondary hypotheses for the IE are below. Note that we provide a primary hypothesis which corresponds to the ITT main analysis, looking at the outcome of relief and main housing duties (detailed in section 10. Analytical Strategy), as well as three secondary hypotheses, which proceed from the Theory of Change and the ambiguous relationship between use of Housing Helper and frequency of prevention duties. As there is uncertainty surrounding the direction of the hypothesised effect of Housing Helper on prevention duties (it may increase prevention duties because more households are connected with their local

authority, or Housing Helper may act preventatively such that fewer households are owed a prevention duty), we provide two hypotheses relating to prevention duties.

Primary hypothesis:

- Housing Helper reduces relief and main housing duties overall among households encouraged to use Housing Helper, when compared with households in the control group.

Secondary hypotheses:

- Housing Helper increases the number of households receiving prevention duties, compared with households in the control group.
- Housing Helper decreases the number of households receiving prevention duties, compared with households in the control group.
- Housing Helper increases the number of households reaching out to Southwark Council for help, compared with households in the control group.

5.2. Study Design

5.2.1. Study design details

This trial is a 2-arm, parallel, randomised encouragement design, with randomisation at the level of the household. A sample of roughly 9000 households will be drawn from the LIFT dashboard, following the inclusion criteria and targeting detailed below under Target Eligibility. Approximately 4500 households will be in each arm. Households in the treatment arm will receive a series of encouragement messages over email and SMS, encouraging them to access and use Housing Helper. Primary outcome data in the form of Southwark administrative data will be collected on all households at the end of the trial implementation window in January 2027, and usage data, survey data, and interview data will be collected from those who comply in the treatment group over the duration of the trial.

5.2.2 Allocation

Allocation Method – Randomised encouragement

Households randomised to treatment will be invited to access Housing Helper via a link sent over email and SMS messages.

Randomisation Technique and Unit

Household is our unit of analysis, and each household will be randomised individually, with an equal (1:1) distribution ratio of treatment and control. Randomising at the household level is the most efficient design in terms of power, and given the targeted nature of the encouragement messages, we do not anticipate risk of spillover effects or contamination. We are not randomising at the individual resident level, as multiple individuals in the same household may be in the LIFT dashboard, and thus randomising at the individual resident would risk spillover between treated and controlled units.

We do not anticipate the need for any stratification variables, as the sample size of 9,000 is sufficiently large to expect that important confounding variables will be balanced between treatment and control groups on average. Initial exploration with Southwark Council has identified ~9,000 households in the LIFT dashboard that may be targeted, thus we anticipate that we will be able to randomise once, rather than take a rolling approach.

Randomisation will be conducted by CHI, using a random number generator whereby each household sampled from the LIFT dashboard will be randomly assigned a number from 0 to 1. Each household will then be sorted high to low, with the first 50% assigned to treatment, and the remainder to control. Randomisation will be conducted in Stata and the .do file will be made available in the final reporting. The decision for CHI to conduct the randomisation was taken due to several practical reasons regarding timing for launching the trial. Ethical approval for CHI's randomisation is provided under the Ethics section.

Allocation Concealment Procedures

Participants in the treatment group will receive encouragement messages from Southwark Council and Change Please, with the option to unsubscribe and to access the privacy notice for this study.

Participants in the control group will receive an email from Southwark Council signposting them to the Council's housing-related webpages (see Section 4.1), but they will not receive any notification that they are in the control group of this study.

5.3. Research Setting

The research setting is primarily via mobile devices or other connected devices, within Southwark borough area. Some qualitative research may take place at Southwark Council offices.

6. TARGET POPULATION

6.1. Eligibility

Inclusion criteria

Participants will be drawn from the LIFT dashboard, filtered by Southwark Council. Households can be included in this study if they meet all of the following criteria:

- Reside in Southwark borough area of London
- Live in council, social, private tenancies
- Have an email address in the LIFT database

We are particularly targeting these groups:

- In rental or council tax arrears with the council (for the former, this only applies to council housing)
- On Universal Credit
- In financial resilience categories 'struggling', 'at risk' or 'in crisis.' These households have take-home income per month less than £100 over their expected expenditure and do not have 3 months of savings. At risk and in crisis households are estimated to be in a cash shortfall.
- Living with a non-dependent NEET (Not in Education, Employment, or Training), aged 16-24 (potential parental/familial eviction risk)
- Have 5+ people residing in the household
- Impacted by +£30/week in welfare reforms (LHA, benefit cap and/or bedroom tax)

In total, these targeted groups amount to approximately 9,000 households.

Exclusion criteria

Households will be excluded if:

- They are living in council-provided temporary accommodation.
- They ask for their data not to be used in the trial, in response to the privacy notice

6.2.1. Recruitment and enrolment

Participating households will be sourced from the LIFT dashboard if they meet the criteria and targets listed above. Once selected, households will be individually randomised to receive a series of encouragement messages, via email and SMS, to use Housing Helper (see section 4. Intervention for detail on the encouragement).

6.2.2. Compliance

Participants will self-select to comply with the treatment, as defined by:

- Clicking the link provided in an encouragement message
- Completing the user sign up flow and creating a Housing Helper account
- Using the Housing Helper for a minimum of 4 minutes

Four minutes was suggested by Change Please as the minimum time required to be risk triaged by Housing Helper and for the user to derive value of some kind. This is based on their experience using Housing Helper in the field (outside the context of this trial and Southwark borough). While we are using this as the cut-off time for determining compliance, we will also explore higher cutoff times that likely correspond to deeper usage as sensitivity checks in the analysis.

There is a reasonable chance that the person who receives the encouragement message (hereafter the "referred person") forwards their unique link to someone else (a "non-referred user"), who then sets up an account and uses Housing Helper (see section 4. Intervention for more detail on this account creation flow). There is a question then of whether we consider that non-referred user to be part of the trial, and whether their use constitutes compliance

for the household associated with the link. To answer these questions, we need to determine whether this non-referred user resides in the same household as the person who received the encouragement. If those individuals live together, it seems safe to assume that the referred person will benefit from the treatment compliance, and we should treat that household as being treated. If they do not live together, then it follows that the household likely will not benefit, and the non-referred user should be excluded from the evaluation altogether.

Making this determination bespoke to each household is likely infeasible, so a judgment call must be made on whether to include classes of non-referred users, with respect to compliance. For this, we will use the unique link and the post code, the latter provided by the user in the account creation stage. If post code matches with the referred user associated with the unique link, we will treat that non-referred user as a member of the same household, and thus their household will be considered a complier. If the post code does not match, we will exclude that user from analysis.

6.2. Trial Flow Diagram

In Figure 1 below, we detail in broad strokes the participant flow through the trial. Participants will first be randomly allocated to two arms: one that receives the encouragement messages to use Housing Helper, and one control group, which receives a basic email message, signposting to Southwark Council resources, but will continue to be supported business-as-usual per Southwark Council's typical processes for households with the target characteristics. Participants selected to receive the encouragement messages will be invited to set up an account with Housing Helper via a link; additionally, they will also have the option to unsubscribe from encouragement messages or access more information, such as the privacy notice associated with this intervention and trial participation.

Once participants in the encouragement treatment group have responded to the invitation and self-selected to use Housing Helper, they will also need to agree to a user agreement which covers the sharing of their usage data with Change Please. After setting up their account, Housing Helper will gather information about the user as part of the risk triage process (see Table 6 below). If they are deemed high/crisis risk, Housing Helper will recommend that users connect with Southwark Council, and in the case of crisis risk, will offer to make the referral to Southwark via the process discussed in 4. Intervention. For low and medium risk users, Housing Helper will provide tailored advice and information, as well as other functions including uploading letters, downloading draft response letters, and accessing information in other languages. Crisis and high-risk users can also engage with these functionalities, regardless of whether they agree to be referred.

Figure 1. Participant flow

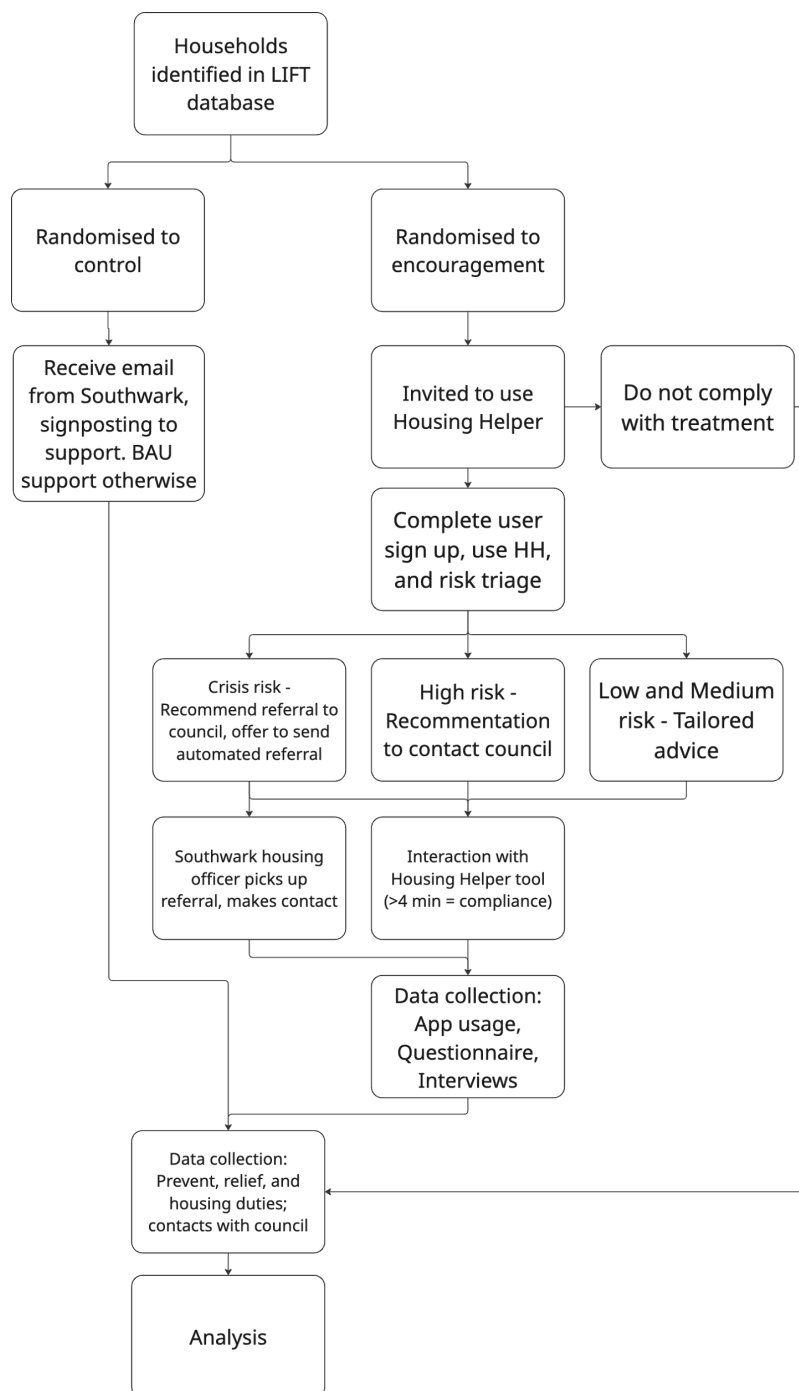


Table 6. Risk triage and response

Risk Triage	Description
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<p>Tier 1: Crisis Score of 60+ or specific crisis flags</p>	<p>Triggers:</p> <ul style="list-style-type: none"> • No safe place tonight • Fleeing domestic abuse • Rough sleeping • Leaving care/prison with no accommodation <p>Response:</p> <ul style="list-style-type: none"> • Emergency safety information • Council referral (to be processed within 24 hours Monday - Friday)
<p>Tier 2: High risk Score of 40-59 or urgency flags</p>	<p>Triggers:</p> <ul style="list-style-type: none"> • Bailiff action within 28 days • Formal notice expiring • Significant rent arrears <p>Response:</p> <ul style="list-style-type: none"> • Prevention advice • Recommendation to contact council for support
<p>Medium risk Score of 15-39</p>	<p>Triggers:</p> <ul style="list-style-type: none"> • Multiple risk factors, unstable accommodation, financial difficulties <p>Response:</p> <ul style="list-style-type: none"> • Tailored prevention advice and signposting to support services
<p>Low risk Score of 0-14</p>	<p>Triggers:</p> <ul style="list-style-type: none"> • Stable situation with general housing queries <p>Response:</p> <ul style="list-style-type: none"> • Information and self-help resources

7. OUTCOME MEASURES

7.1. Primary Outcome

Definition

For the ITT analysis, we are looking to capture total differences in the numbers of relief and main housing duties owed to those who are encouraged to use Housing Helper, compared with participants in the control group.

Measurement

These measures will be taken from administrative data, provided by Southwark Council.

When is it measured?

We are interested in duties initiated during the period of the intervention, plus one year, roughly November 2025 – January 2027.

For whom is it measured?

All participants in treatment and control groups (9,000 total), regardless of complier status, will be included in the total of duties assessed.

7.2. Secondary Outcomes

7.2.1 Domain of Secondary outcome

Definition

We are interested in total differences in the numbers of prevention duties owed to those who are encouraged to use Housing Helper, compared with participants in the control group.

We are also interested in understanding whether using Housing Helper drives more households to contact Southwark Council for help. Here, we are primarily interested in the number of households who reach out for housing help from the treatment and control groups.

Measurement

These measures will be from administrative data, provided by Southwark Council. In both cases, this will be measured as a binary: if a household is owed a prevention duty, that value for prevention duty will be coded as True or 1; similarly for a household that makes contact with Southwark Council, that contact will be coded as True or 1 for that household, irrespective of the number of times the household makes contact during the data collection period.

When is it measured?

We are interested in contacts during the period of the intervention, plus one year, roughly November 2025 – January 2027.

For whom is it measured?

All participants in treatment and control groups (9,000 total), regardless of complier status, will be included in the total number of contacts for help.

8. DATA COLLECTION

8.1. Data collection methods

Table 7. Data collection procedures and assessment timeline

Assessment point	Type of data	Data collection approach

Baseline	Data on individual household characteristics: <ul style="list-style-type: none"> • Rent • Rent arrears (binary) • Council tax arrears (binary) • Housing tenure • Age in years category (for reference individual) • Earnings • Income after costs • Number of children living at home 	Administrative data (LIFT dashboard)
Endline	Prevention, relief, and main housing duties owed Data on individual household characteristics (see above)	Administrative data (NEC data from Southwark)
Endline	Households reaching out to Southwark Council for assistance	Administrative data (NEC data from Southwark)

8.2. Retention strategies

For the IE, there will be no incentives for participants to use Housing Helper and given that the outcomes are derived from administrative data, there is no need to keep participants engaged through to an endline survey. The main task will be encouraging participants to sign up and use the Housing Helper Tool, which is detailed in 4. Intervention.

9. SAMPLE SIZE AND POWER CALCULATION

9.1. Sample Size / Power Calculation

Power calculations are based on our primary outcome of interest: rates of homelessness duties owed to households during the trial period. This is operationalised as a binary measure, whereby if a household is owed either relief or main housing duty, it will be coded as 1, and 0 otherwise. We are assuming a negligible risk of spillover between households in the sample, therefore no clustering of treatment is necessary, and given the large sample size of 9,000 households and the limited possibilities for subgroup analysis, we are also not stratifying randomisation.

We are limited to the viable sample available in the LIFT dashboard for Southwark Council, so for these power calculations, we are starting from a 9,000 household sample and

calculating the Minimum Detectable Effect Size (MDES) based on a set of assumptions of rates of compliance (rather than starting with an MDES and calculating the required sample).

9.2. Software and Assumed rates of compliance

Power calculations have been conducted using the R package *pwr* (Champely, 2020), using the function for power calculations for two proportions, and *powerLATE* package (Bansak & Yang, 2024).

We provide three MDES, across three scenarios of recruitment. Table 8 provides these three scenarios for rates of compliance, based on different assumed values of click-through rates (Click) where the unique link is clicked, account creation (Account), and meeting the usage threshold of four minutes (Use), which, when multiplied together, give us an estimated proportion of compliance, $P(\text{Complier})$. We then use the assumed proportion of compliers to dilute the ITT MDES, assuming that among households sorted to treatment who do not comply, their average outcome is essentially the same as households in the control group, i.e. their measured effect is equal to zero.

Note that without benchmarks from similar campaigns that Southwark has done via gov.notify or that Change Please has done via HubSpot, these compliance scenarios are based primarily on intuition, with some reference to industry averages of engagement rates with charity email campaigns.

More information on each of the values and assumptions in the power calculations are provided below:

- All MDESs are reported as a Cohen's h value, which reports a standardised effect size comparing two independent proportions.
- All calculations use a standard alpha 0.05 (Type I error), power of 0.8 (Type II error), and use two-sided hypothesis testing.

Table 8. Assumed compliance across three scenarios

	Scenario A	Scenario B	Scenario C
Assumptions			
Click	0.2	0.3	0.4
Account	0.4	0.4	0.75
Use	0.75	0.75	0.75
$P(\text{Complier})$	0.06	0.09	0.225
Complier sample	270	405	1012

If we were to see 100% compliance across the 4500 households sorted to treatment, we could detect an effect size as small as Cohen's $h = 0.059$. We incorporate the expected compliance rate scenarios in Table 8 by multiplying the proportion of compliers with the 100% compliance rate Cohen's h , to get the following MDES estimates in Table 9.

Table 9: Sample size calculations

		Scenario A	Scenario B	Scenario C
Minimum Detectable Effect Size - ITT		0.984	0.656	0.262
Alpha		0.05		
Power		0.8		
Alternative hypothesis: One-sided or two-sided		Two-sided		
Number of participants	Intervention (encouraged)	4,500	4,500	4,500
	Control	4,500	4,500	4,500
	Total	9,000	9,000	9,000
Expected compliance rate (%)		6	9	22.5
Complier sample (intervention)	Total	270	405	1012

The three scenarios for the ITT MDES above roughly correspond to what would be considered powered to detect a large effect (Cohen's $h = 0.8$), a medium effect ($= 0.5$) and a small effect (0.2).

It is challenging to predict which of the three scenarios above is most realistic, given that we do not know much about the quality of the contact records in our sample from the LIFT dashboard, and we also cannot predict how open these households will be to trying out a new chatbot tool. Our compliance gateway threshold is set at 7% because it roughly corresponds to the minimum we would anticipate needing to recruit in order to detect a large size effect, while also seeming to be an achievable compliance rate, at least ex ante.

10. ANALYTICAL STRATEGY

10.1. Analytic Sample

The analytic population is made up of all households in the sample provided by Southwark Council via the LIFT dashboard.

10.2. Descriptive statistics

We will provide the following descriptive statistics:

- Characteristics included in the sample (age, tenure, size of household, income, number of children, age of referred person).
- Balance achieved across treatment and control by covariate. Balance will be reported as absolute numbers/group means and their standard deviations, as well as standardised mean differences.

- Rates of compliance and noncompliance within the treatment group, by covariate (similar statistics reported as the balance table).
- Rates of intermediate measures of engagement with the encouragement, including open rates, click-through rates, and account creation.
- Distribution of user time spent on Housing Helper
- Aggregated statistics on outcome measures between treatment and control

10.3. Primary Analyses

We will use the following OLS model to estimate the ITT effect:

$$Y_i = \alpha + \beta_1 W_i + \beta_2 X_i + u_i$$

Where:

- Y_i is the probability of being owed a main housing or relief duty for individual household i
- α is a regression constant
- W_i is a binary indicator of whether or not the household has been selected to receive the encouragement.
- X_i is a vector of participant characteristics including age (categories), income, number of children, and tenure.
- u_i is an error term at the level of the individual household.

Uncertainty will be reported as p-values in the form of continuous probabilities, as well as 95% confidence intervals with upper and lower bounds. Data cleaning and analysis will be conducted in R Studio, and R scripts (anonymised) will be provided in the final reporting.

10.4. Secondary analyses

10.4.1. Prevention duties and contacting the council

Analyses for secondary outcomes will follow the same procedure as the primary analysis, with the secondary outcome measures of (1) prevention duties owed to households, and (2) households making contact with council (binary)

10.4.2. CACE analysis - Exploratory

We will plan to conduct CACE analysis on an exploratory basis, the reason being we strongly suspect that the exclusion restriction is not met in this case, i.e. we believe that the encouragement messages will have an impact on the outcomes, not strictly through the treatment. That said, given the potential challenge of detecting an effect (anticipating low rates of compliance, and relief and main housing duties being relatively rare events), we

want to explore the local average treatment effect just for compliers, as we may be more likely to detect an effect by restricting to this relatively smaller group.

Given the nature of 2SLS not being computable “by hand,” i.e. we need to rely on a computer programme in order to avoid yielding the wrong residuals in the second stage, below is an example of how 2SLS would be conducted in R, using the `iv_robust` formula from the `estimatr` package (Blair et al, 2024):

```
model_2sls <- iv_robust(duty ~ chat + covars + | encour, data = lift_dashboard)
```

Where:

- `duty` is the outcome measure, being owed a main housing or relief duty
- `chat` is a binary indicator of complying with the treatment
- `covars` is a vector of participant characteristics
- `encour` is a binary indicator of being assigned to receive the encouragement

In order to account for the possible effect of the encouragement on the outcome, we will follow the process laid out by Conley et al (2012), whereby we will estimate a range of possible predicted values for the outcome based on assumed values of the direct treatment effect of the encouragement.

10.4.3. Subgroup analyses

There are a few dimensions worth exploring through subgroup analysis: age (in the case of the referred user), rental/council tax arrears, and immigration background/English as an additional language (EAL). In the case of age, we expect that younger users may differ in their outcomes from older users on average; similarly, for those with an immigration background/EAL status, they may benefit from Housing Helper’s ability to give housing information and advice in their native language. Finally, those in payment arrears may benefit more from Housing Helper advice, compared with those with more intractable challenges.

We would operationalise subgroup analyses by adding an interaction variable with the binary treatment variable. Age as a categorical variable will give interaction effects for each age band. For payment arrears, we would operationalise this as a binary indicator, where if either rental arrears or council tax arrears is true, it will be coded as 1. For immigration background/EAL, this would also likely be operationalised as a binary indicator, but this will require further exploration of available data in the LIFT dashboard and may be dropped from analysis if infeasible.

10.4.4. Compliance sensitivity analyses

We have set four minutes as a compliance threshold, and for the CACE analysis detailed above, we will run the analysis using this same compliance definition initially. We will also explore other cutoff times for defining compliance as a sensitivity check. These cutoff

values will be based on the statistical variance of user time spent on Housing Helper taken from Change Please-provided usage data, looking at one to two standard deviations below the mean. To analyse, we will simply run two additional 2SLS analyses, replacing the encour binary indicator with the newly defined compliance indicators (one standard deviation and two standard deviations below the mean).

10.5. Missing data

Given the simplicity of the primary and secondary analysis and the lack of reliance on survey data for the IE, we do not anticipate challenges due to observations on outcome measures missing not at random (MNAR). Further, we are limited in the possible covariates available for inclusion from the LIFT dashboard (age, income, tenure), which also limits the potential for listwise deletion of observations during analysis. That said, rates of missingness for these variables will be explored, and if inclusion of these variables would contribute to a listwise deletion rate of > 5%, we will employ multiple imputation to supply plausible values. We will also provide nested model outputs (i.e. regression tables with and without covariates).

10.6. Adjustment of Confidence Intervals and p-values for Multiple Statistical Tests

As we are planning a modest number of models for this trial, we do not meet the need for multiple comparison adjustments under the [CHI impact evaluation guidance](#).

11. IMPLEMENTATION AND PROCESS EVALUATION (IPE)

11.1. Aims, Objectives and Research Questions

11.1.1. Aims and Objectives

The aims of the Implementation and Process Evaluation emerge from the Theory of Change of the intervention described previously.

1. To evaluate the fidelity of the intervention (whether Housing Helper is used as intended).
2. To understand how the Housing Helper tool is used in practice.
3. To understand user and professional perceptions of Housing Helper.
4. To understand the mechanisms of change created by Housing Helper.
5. To understand factors that moderate the effectiveness of Housing Helper.
6. To understand the key risks, opportunities, and unintended consequences associated with Housing Helper.
7. To explore what current support looks like for low and high-risk users without Housing Helper.

11.1.2. Research Questions

Fidelity:

1. To what extent were the core components of Housing Helper, including the triage and referral of high-risk users, delivered as intended?
2. What adaptations were made in practice (e.g. LA workflows, messaging strategies, monitoring processes), and why?

Exposure/Dose:

3. How often and for how long do users engage with Housing Helper, and which features (letters, calculators, translations) do they actually use?
4. What proportion of users return for multiple sessions, and what predicts sustained use?

Quality of delivery:

5. Is the advice accurate, understandable, and actionable, including when responding to Section 8/Section 21 notices?
6. How effective is the monitoring framework in detecting and addressing inaccuracies, hallucinations, or bias?

Participant responsiveness:

7. Do users perceive the advice given as trustworthy, relevant, and safe to act on?
8. What do users find is the most helpful element of Housing Helper?
9. What actions do users take after engaging with Housing Helper (e.g. sending letters, requesting rent reductions/payment flexibility, challenging notices, contacting support services)?

Reach:

10. Who is actually being reached (by demographics, risk levels, vulnerability groups), and who is being missed compared to the intended population?
11. How effective are the nudging strategies (emails, SMS) at activating and re-engaging different user groups?

Risks and opportunities:

12. What were the key opportunities and risks identified by staff and stakeholders?
13. What were the key facilitators and barriers to users accessing Housing Helper and actioning advice received (e.g. access to devices, digital skills, language)?

Mechanisms of change:

14. How do specific Housing Helper actions (letters sent, referrals made) lead to intermediate outcomes (payment plans, rent flexibility, successful challenges)?
15. What mechanisms explain earlier support for high-risk users (e.g. faster referrals, better triage accuracy, improved LA responsiveness)?

16. Are there differences in the mechanisms at play and the outcomes achieved by different sub-groups of users (e.g. by arrears, survivors of domestic abuse, EAL, care leavers)?

Context/Moderators:

17. How did the local authority context (e.g. capacity, IT systems, housing pressures) influence implementation, fidelity, and outcomes?
18. What are the local authority (housing officers, IT professionals) perceptions of Housing Helper?
19. Can we understand and monitor how Housing Helper's model changes over time?
20. What are the facilitators and barriers to scaling up the use of Housing Helper, or using it in other contexts?

Usual Practice and Programme Differentiation:

21. What does "usual practice" for low and high-risk users look like without Housing Helper (pathways, timelines, outcomes)?
22. How does Housing Helper differ from usual practice in terms of timeliness, accessibility, and workload?

11.2. Research Design and Methods

To answer the research questions above, we will be making use of surveys, interviews, focus groups, and Housing Helper usage data.

Follow-up Survey with Users:

- **Methodology**
We will send all participants who were in the treatment group and complied with the intervention (i.e. those who used the Housing Helper for a minimum of 4 minutes) an invitation to take part in a follow-up survey. The survey will ask demographic questions, and explore how participants used the Housing Helper, and their perceptions of it.
- **Target population and sampling strategy**
We will target all compliers in the treatment group (up to 4,500 participants).
- **Recruitment**
All eligible participants will receive an email and a text message briefly explaining the research and with a link to the user survey, which will begin with an information sheet and consent form. If the participant does not consent, the survey will automatically end, and their data will not be collected.
- **Incentives**
All participants will be entered into a lottery to win a £500 online voucher from Love2Shop.

- **Data sources**
From the survey we will collect demographic data, as well as data on how participants used the Housing Helper and their perceptions of it.
- **Data collection procedures**
The survey will be hosted on Qualtrics. It will be emailed to participants, and they will receive an email and SMS reminder to complete the survey.
- **Data quality, assurance and confidentiality**
All data will be securely held on a King's College London server, and only members of the research team will have access to the data. The time a participant takes to complete the survey will be recorded, and any survey completed in less than 3 minutes will be discarded as they are likely to be poor quality data.

Semi-Structured Interviews with Users:

- **Methodology**
We will aim to interview a sub-sample of 20 participants in the treatment group. We have chosen to interview 20 participants because research has shown that for qualitative research employing thematic analysis, a sample size of 12 – 20 participants usually results in data saturation, and therefore the completion of the research (Ahmed, 2025). We have erred on the conservative side by choosing to include 20 participants, as the Housing Helper intervention is complex and there are many different ways participants might engage with it. A detailed interview guide will be developed in order to provide structure and ensure consistency across interviews, but the semi-structured nature of the interview will allow opportunities for participants to share what matters to them. In the interview, we will explore user perceptions of Housing Helper, how Housing Helper is used in practice, mechanisms of change, and key risks and opportunities associated with Housing Helper.
- **Target population**
We will interview a subsample of 20 treatment group participants.
- **Sampling strategy**
Initially, we will purposively sample to interview 5 participants who accessed Housing Helper in languages other than English, 5 high-risk users, and 5 low-risk users (a users' language and risk level may overlap). We will then review the data to decide how to sample the remaining interviews. This will allow us to ensure that the experiences of sub-groups we are particularly interested in are represented in the IPE, and to be responsive if data saturation has/has not been reached with a particular sub-group.
We will seek to recruit a sample that represents the diversity of study participants in the case of age and gender.

- **Recruitment**
Users will be sent an email and/or text message inviting them to attend a telephone interview about their experiences using the Housing Helper tool. Users are not required to participate in an interview, and we will seek consent to be interviewed. A reminder of the interview will be sent the day before it is scheduled to minimise attrition.
- **Incentives**
Participants will be compensated with a £25 digital voucher per interview, with a maximum of one interview per participant.
- **Data sources**
Data will be collected from the semi-structured interviews with selected participants. A detailed interview guide will be developed in order to provide structure and ensure consistency across interviews.
- **Data collection procedures**
Interviews will be conducted by trained and experienced researchers, following the risk and safeguarding protocol (see Appendix D) for the present study. Interviews will be conducted by phone. Interviews will be audio-recorded and transcribed. Names will not be transcribed.
- **Data quality, assurance and confidentiality**
All audio recordings will be stored securely and destroyed following transcription. All personal information will be removed from transcripts, and transcripts will be stored using the participant's pseudonymous identifier to link them to survey responses and demographics of the participant. All transcripts will be stored securely, and only the research team will have access.

Focus groups with Housing Officers

- **Methodology**
We will conduct two focus groups with Housing Officers and people in adjacent roles at Southwark Council. Each focus group will consist of 4-5 participants. A focus group topic guide will be facilitator-led and developed to provide structure and ensure consistency across focus groups, although the groups will be participant-centred and will include multiple opportunities for participants to share what matters to them. In the focus groups, we will predominantly explore the fidelity of the intervention, risks and opportunities associated with the intervention, mechanisms of change, contextual and moderating factors, and usual practice without the use of Housing Helper.
- **Target Population**

We will recruit participants for focus groups who are Housing Officers or similar roles at Southwark Council.

- Sampling Strategy

We will aim to construct a diverse sample of people who work in Housing at Southwark Council and have had direct contact with people who have used Housing Helper. We will not include managers or other senior leaders in the focus groups, because we believe that involving managers would change the power dynamic of the groups, and because we think that frontline workers will have a more comprehensive set of perspectives on how users' outcomes are influenced by Housing Helper.

- Recruitment

We will request the contact details of everyone who works in housing at Southwark Council who has had direct contact with somebody who has used Housing Helper and is not a manager or senior leader. We will randomly select 14 individuals to be invited to the focus groups. We will invite 14 rather than the 8-10 needed to reach our planned sample size to account for availability and attrition. If inviting 14 people to take part in a focus group does not yield sufficient participants, we will randomly select further groups of five participants until our target sample size has been reached.

- Incentives

We will not be providing incentives for taking part in a focus group.

- Data sources

Data will be collected from the focus groups with selected stakeholders. A topic guide to structure the discussion will be developed in order to provide structure and ensure consistency across focus groups.

- Data collection procedures

Focus groups will be conducted by trained and experienced researchers, following the risk and safeguarding protocol for the present study. Focus groups will be conducted by videoconferencing or in person depending on the group's makeup and location. Focus groups will be audio-recorded and transcribed; however, names will not be transcribed.

- Data quality, assurance, and confidentiality

All audio recordings will be stored securely and destroyed following transcription. All personal information will be removed from transcripts, and transcripts will be stored using the group's pseudonymous identifier to link them to the survey responses and demographics of the participants. All transcripts will be stored securely, and access will be limited to the research team of the present study only.

Semi-structured interviews with professionals

- **Methodology**
A sub-sample of 5 participants made up of Change Please and Southwark Council IT professionals, software developers, and Data Protection Officers will be invited to take part in an in-depth phone interview. A detailed interview guide will be developed in order to provide structure and ensure consistency across interviews, but the interview will be participant-led and will include opportunities for participants to share what matters to them. In the interviews, we will explore the fidelity of the intervention, mechanisms of change, contextual and moderating factors.
- **Target population**
We will interview a subsample of five IT professionals, software developers, and Data Protection Officers from Southwark Council and Change Please.
- **Sampling strategy**
We will recruit two IT professionals (one from Southwark Council and one from Change Please), two Data Protection Officers (one from Southwark Council and one from Change Please), and one software developer from Change Please.
- **Recruitment**
We will use our contacts at Change Please and Southwark Council to recruit participants. Users are not required to participate in an interview, and we will seek consent to be interviewed. A reminder of the interview will be sent the day before it is scheduled to minimise attrition.
- **Incentives**
We will not be offering incentives to take part in an interview.
- **Data sources**
Data will be collected from the semi-structured interviews with selected participants. A detailed interview guide will be developed in order to provide structure and ensure consistency across interviews.
- **Data collection procedures**
Interviews will be conducted by trained and experienced researchers, following the risk and safeguarding protocol (see Annex) for the present study. Interviews will be conducted by phone. Interviews will be audio-recorded and transcribed. Names will not be transcribed.
- **Data quality, assurance and confidentiality**
All audio recordings will be stored securely and destroyed following transcription. All personal information will be removed from transcripts, and transcripts will be stored using the participant's pseudonymous identifier to link them to survey responses and

demographics of the participant. All transcripts will be stored securely, and only the research team will have access.

Embedded survey in Housing Helper

- **Methodology**
We will embed a very short survey into Housing Helper, at the end of the user's conversation. We will ask questions about how useful people found the tool, how easy they found it to interact with, and whether they would use it again.
- **Target Population and Sampling Strategy**
The target population is all users of the Housing Helper, up to 4,500 users.
- **Recruitment**
All Housing Helper users will see the survey when they finish their conversations with Housing Helper. There will be a short explanation that the survey will be used for research purposes, with a link to an information sheet users can access. The survey will begin with a consent question, and if users do not consent, the survey will close.
- **Incentives**
No incentives will be offered for taking part in the survey.
- **Data sources and data protection procedures**
Data will be collected from the survey embedded in the Housing Helper tool and completed by users. This data will be linked to an individual user's Housing Helper usage data and collected in aggregate. The survey data will be collected by Change Please.
- **Data quality, assurance, and confidentiality**
Data will be securely held by Change Please on their internal servers, before being transferred to King's College London to be stored on KCL secure SharePoint servers. This data will only be accessible to relevant researchers.

Usage data from Change Please

- **Methodology**
Usage data for all users, both those who used Housing Helper for less than the compliance cut-off of 4 minutes, and compliers who used Housing Helper for 4 minutes or more, will be collected from Change Please and shared with KCL: these will be app-based metrics, including risk triage category, length and frequency of sessions, use of features including uploading and drafting letters and language options; and category. Further, Change Please will provide data on open- and click-through rates for the encouragement messages. The aim is to understand patterns of usage descriptively, including typical usage, whether certain features of

Housing Helper tend to be used over others, and whether particular encouragement messages perform better than others and for whom.

- **Target Population and sampling strategy**
Usage data will be collected from those participants who meet the compliance threshold, as part of Change Please's internal website usage metrics. Open- and click through-rates will be collected and shared in aggregate, on all participants who receive the encouragement messages.
- **Data sources and collection procedures**
Data will be derived via Change Please's usual processes in collecting website usage metrics and campaign performance (in this case, campaign performance is the number of users who sign up and use Housing Helper after each encouragement message is sent).
- **Data quality, assurance, and confidentiality**
Change Please will be responsible for quality assurance on their internal data collection. Though we will aim to collect usage data at the user level, this will be accompanied by very limited personal information (age category), making the risk of identification highly remote. In any event, data will be transferred securely and stored on KCL secure SharePoint servers, accessible only to relevant researchers.

Changes to the Housing Helper Model from Change Please

- **Methodology**
Change Please will maintain a log, with timestamps, of any significant changes to the underlying RAG model in Housing Helper that result in performance changes for the user, e.g. document updates in response to legislation developments, ad hoc technical troubleshooting.
- **Target Population and sampling strategy**
N/A
- **Data sources and collection procedures**
Data will be derived via Change Please's usual processes in documenting development updates.
- **Data quality, assurance, and confidentiality**
N/A

Table 10. Summary of data collection for IPE

Assessment point	Type of data	Data collection approach
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During intervention implementation	<ul style="list-style-type: none"> Usage data: <ul style="list-style-type: none"> The risk level users are triaged into How many times each user accesses Housing Helper How long each use of Housing Helper lasts Whether users uploaded a letter Whether users used Housing Helper to write a letter Whether users accessed Housing Helper in English or a language other than English User satisfaction data: <ul style="list-style-type: none"> User reports on what they used Housing Helper for How satisfied users are with Housing Helper How likely users are to recommend Housing Helper 	Embedded user survey (collected by Change Please)
Endline	<ul style="list-style-type: none"> Demographic data: <ul style="list-style-type: none"> Age category (18 – 24; 25 – 34; 35 – 44; 45 – 54; 55 – 64; 65 and over) Gender (Male; Female; Non-binary; Self-describe) English first language/other first language Highest level of education completed (Primary school; Secondary school up to 16 years; Higher or secondary or further education; University degree or higher) Type of accommodation currently occupying How Housing Helper was used, whether the user was referred to Southwark Council and how quickly that happened, whether Housing Helper was used to send a letter and what happened as a result of sending the letter; Whether Housing Helper was accessed in English or a different language, whether users were aware they could access it in other languages, and the accuracy of language translations; 	Complier user survey

	<ul style="list-style-type: none"> • Whether the user approached Southwark Council for assistance independently, whether the user approached other support services; • Perceptions of Housing Helper (trustworthiness, usefulness, ease of use, friendliness, comfort using); • Whether the user has ever experienced domestic abuse, has been in care, or has rent or council tax arrears. 	
Endline	<ul style="list-style-type: none"> • Data on how Housing Helper was used: <ul style="list-style-type: none"> ○ Experiences using Housing Helper ○ What features were used, and how helpful they were ○ Actions taken as a result of using Housing Helper ○ Outcomes of using Housing Helper • Data on perceptions of Housing Helper • Data on mechanisms of change • Differences in outcomes for people in different subgroups (e.g. experience of domestic abuse, care leavers, EAL) 	Semi-structured interviews with users
Endline	<ul style="list-style-type: none"> • Data on the fidelity of the intervention • Data on mechanisms of change • Facilitators and barriers to scaling up the use of Housing Helper • Data on perceptions of Housing Helper • Data on usual practice for users of Housing Helper 	Focus groups with Housing Officers
Endline	<ul style="list-style-type: none"> • Data on the fidelity of the intervention • Data on the efficacy of the monitoring framework • Key opportunities and risks with scaling Housing Helper • Data on how the Local Authority context influenced outcomes • Perceptions of Housing Helper 	Semi-structured interviews with professionals
Endline	<ul style="list-style-type: none"> • A log with timestamps of any significant changes to Housing Helper's RAG model 	Change Please model log data

11.3. Data Analysis

Data Preparation

Interviews and focus groups will be recorded and transcribed in full by a professional transcription service that has a non-disclosure agreement in place with King's College London. Transcripts will be entered in NVivo 12 for content analysis and will be anonymised at the point of transcription. Care will be taken to ensure that information shared during interviews and focus groups does not contain identifiable data. If an interviewee reveals identifiable data, this will be redacted in transcription.

Data Coding

Qualitative data will be analysed thematically to explore participants' and professionals' experiences, views, and perceptions. These will be reflected in a rough coding framework based on the research questions in section 11.1.2. The coding framework will also integrate other related issues that emerge during the course of interviews. We will support thematic findings by analysing within cases to develop individual case studies.

Qualitative analysis of the interviews will be conducted by two members of the team who will identify key themes within each transcript and code their emerging findings independently from each other. After the initial round of independent coding, the researchers will review and discuss emerging themes to check assumptions, roughly estimate inter-rater reliability, and modify the coding framework as needed. Where diverging opinions occur, these will be discussed, and an agreement reached that is reflected in the final coding framework.

Descriptive quantitative analysis of usage data from Change Please will be performed to determine the nature of participants' use of Housing Helper.

Table 1 Implementation and Process Evaluation Summary

IPE Research Question	Research methodology	Target population(s)	Data collection methods	Sample size and sampling approach	Analytic approaches
1, 3, 5, 7, 9, 10, 13, 14, 16,	Survey with users	Users who have complied with treatment	Digital survey	All users who meet the compliance threshold, invited over email	Descriptive analysis
1, 5, 7, 8,9, 13	Interviews with users	Users who have complied with treatment. Purposive sampling of EAL, high/low risk users	Phone interview	Email invites to Users who have agreed to be contacted who fit our demographic criteria, until	Thematic analysis

				sample size of 20 is reached.	
1, 2, 5, 6, 7, 9, 10, 12, 13, 14, 15, 16, 17, 18, 20, 21, 22	Focus groups with housing officers	People who work as a Housing Officer or similar role at Southwark Council and had direct contact with someone who used Housing Helper.	Microsoft Teams Focus Group	Randomly select 14 participants from a list of relevant people to invite to the focus group, aiming for a final sample size of 8-10.	Thematic analysis
1, 2, 6, 12, 17, 18, 19, 20, 21, 22	Interviews with IT professionals and DPOs	People who work in IT/software development and as Data Protection Officers at Southwark Council and Change Please	Phone interview	Convenience sample of two IT professionals (one from Southwark Council and one from Change Please), and two Data Protection Officers (one from Southwark Council and one from Change Please).	Thematic analysis
3, 4, 10, 11	Usage data from Change Please	All members of the treatment group	Change Please's usual processes in collecting website usage metrics and campaign performance	All members of the treatment group	Descriptive analysis
19	Model log data from Change Please	N/A	A log Change Please will keep taking note of any significant	N/A	Descriptive analysis

			changes to the model during the trial period		
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12. ECONOMIC EVALUATION DESIGN

12.1. Aims, Objectives and Research Questions

12.1.1. Aims and Objectives

The aim of the economic evaluation is to understand the cost-benefit of the Housing Helper intervention, as implemented as part of the IE.

The objectives of the economic evaluation are to:

- Understand the costs associated with deploying Housing Helper.
- Understand the monetised benefits of deploying Housing Helper.
- Understand the Cost-Benefit Ratio, based on the estimated costs and monetised benefits.
- Provide a realistic picture of the costs and considerations for both scaling Housing Helper and for implementing it in other contexts.

Note: The economic evaluation will only be run in the case of finding a significant effect for the primary analysis of the impact evaluation. This will be considered another “gateway” of the analysis, in addition to the compliance gateway for continuing with the impact evaluation. If a null result is found, a full economic evaluation to consider both costs and benefits is of little value. Instead, we will report costs only.

12.2. Research Design and Methods

Overall Approach

The economic evaluation will follow a cost-benefit analysis approach, using the Greater Manchester Cost-Benefit Analysis (GMCBA) model according to the latest Green Book guidance (March 2022). We will follow the “ingredients method” (Levin et al., 2018) to identify costs, which aims to account for all resources required to implement a program.

Relevant Alternatives/ Counterfactuals

The counterfactual will be the costs associated with business-as-usual of support provision for the control group.

Evaluation Perspective and relevant stakeholders

Relevant stakeholders to be considered in this economic evaluation include Change Please, Southwark Council, and participating households. While the potential impact on communities may also be relevant, we are not taking a societal perspective in this study due to time constraints and the limited data collection window.

Time Horizon

The time horizon is the same as the IE: encouragement treatment + approximately 12 months. Given the short time frame, we will not be applying discount rate adjustments to account for inflation.

Costs

We anticipate including the following costs:

- Change Please licencing fees (fixed and variable)
- Council staff time to get trained on and administer Housing Helper, as well as possible additional time spent working with households in the treatment group, compared with the control
- Marketing and comms to support outreach and sign-ups
- Any fixed or variable costs in terms of computing power to administer Housing Helper

Benefits (and averted costs)

We anticipate the following monetised benefits:

- For the council: Fewer homelessness duties owed overall, reduction in prevention duties owed to low-risk users, reduction in relief and main housing duties owed to high-risk users
- For users of Housing Helper: Improved housing stability and reduced life disruption, as measured through averted costs associated with moving, potential disruption to earnings and schooling.
- At the national level: Reduced fiscal costs of benefits and other economic costs to the exchequer measured through the Employment and Economy element of Units Costs in the GMCBA model

Sensitivity Analyses

Sensitivity analysis will be conducted to test the robustness of results; where there are uncertainties in key parameters, we will produce multiple models based on these different assumptions.

Optimism Bias Assessment

As per the Green Book, we will calculate 10% and 20% adjustments of CBA estimates in order to account for optimism bias.

12.3. Data Collection

Data Sources

Data will be collected from the following sources for the economic evaluation:

- NEC database (Southwark Council) - Outcome data for households, including duties owed, contacts with council
- User survey (Participants) – Qualtrics survey sent to compliers by KCL
- Costs to Southwark Council in implementing Housing Helper – Spreadsheet capturing staff time (training and administration), computational requirements,

marketing and comms, additional time spent with at-risk households in treatment group compared with control

- Costs to Southwark Council in supporting at-risk households across treatment and control groups (allocating homelessness duties, providing additional support)
- Costs from Change Please on licensing (fixed and variable)

Data Collection Procedures

There are several data flows across Southwark Council, CHI, Change Please, KCL, and research participants, which are detailed separately below:

Costs to Southwark Council:

KCL have developed a data request spreadsheet comprising of staff costs (salary and non-wage costs), set-up costs for training and tech set-up for tool and encouragement (in staff days), implementation costs for monitoring Housing Helper and ongoing meetings (in staff days), and miscellaneous costs (marketing emails, use of LIFT dashboard, web hosting, printing, travel, etc). This spreadsheet has been discussed and shared with Southwark Council to validate feasibility. Data will be transferred to KCL via the spreadsheet template at the conclusion of the implementation period (January-February 2027).

Costs from Change Please:

Housing Helper is envisioned as a service license for local authorities who want to offer this service. KCL will work with Change Please to identify the licensing costs (including set-up fees, per-user rates, etc) and calculate costs based on the usage during the trial.

Outcome measures:

To calculate benefits to Southwark and Housing Helper users, we will:

- Leverage the outcome data collected as part of the IE and assign an amount of possible averted costs for any measured reduction in duties owed, based on National Audit Office data.
- Extrapolate from data collected in the complier user survey (triangulate with observed differences in duties owed) to understand reduced life disruption as a result of housing instability.

National outcomes:

- Based on the outcome data on duties owed, we will refer to the Employment and Economy element of Units Costs in the GMCBA model, to assess possible reductions in fiscal costs of benefits and other economic costs to the exchequer.

Data Collection Schedule

Provide a timetable indicating when data collection will occur.

- January 2026: Determine whether the gateway threshold has been met for continuing with IE
- December 2025 - March 2026: Administration of user survey, qualitative interviews and focus groups
- July 2026: Interim outcome data transfer from Southwark Council to KCL on duties owed, contacts with council
- January – February 2027: IE primary analysis, determination as to whether to continue with full economic evaluation

- February – March 2027: Final IE outcome data and EE data transfer from Southwark Council to KCL. Data transfer from Change Please to KCL with licensing costs. Consultation of NAO and GMCBA to calculate averted costs for duties owed and benefits to reduced life disruption.

13. QUALITY CONTROL AND ASSURANCE

13.1. Data Quality and Assurance

Administrative quantitative data is collected by Southwark Council, quantitative user data will be collected by Change Please, and quantitative survey data will be collected by KCL. Data collection will be subject to the quality controls and assurance processes of each organisation. Analysis of quantitative data will be subject to internal quality assurance at KCL, with code being quality assured, as well as analytical decisions discussed among the evaluation team. The code used in the evaluation will be published to GitHub at the conclusion of the project.

Analysis will then be quality assured by Susannah Hume, Director of Evaluation at the Policy Institute, who is not a part of the evaluation team and can provide more independent oversight prior to external peer review.

Qualitative data will be quality assured via a random audit of the coding of interviews and focus groups, by randomly selecting a subsample of these to be blindly recoded by another member of the research team.

13.2. Protocol Deviations and Non-Compliance

All deviations from the trial protocol will be recorded in a deviations log associated with the trial. This will include non-adherence to randomisation, deviations in the data collection, changes to the eligibility criteria, and any changes to the analysis necessitated by unforeseen circumstances. This deviations log will be shared between KCL, Change Please, Southwark Council and CHI, and will be updated by all organisations as deviations occur. Prior to analysis taking place, the evaluation team will consider these deviations and whether they necessitate changes to the analysis. If they do, a protocol addendum will be written by the evaluators and reviewed by CHI prior to publication, and prior to any analysis taking place. This follows the process laid out by Anders et al (2017), for evaluations of complex interventions. The full (anonymised) deviations log will be published as an appendix to the final evaluation report.

14. REGISTRATION

14.1. Register

This protocol has been registered with the Open Science Framework: osf.io/rbh4j.

15. ETHICS

15.1. Ethical Approval

King's College London (KCL), as lead evaluator, is undertaking their standard institutional ethical approval process. This includes ethical review of the Implementation Process Evaluation (IPE), specifically covering the user survey and interviews with participants and professionals. This approval has been granted, reference ID LRS/RGO-24/25-51364. KCL will also submit an ethics amendment to cover the analysis of the impact evaluation data.

Given the time-sensitive nature of the Evaluation Accelerator Fund (requiring an initial report by March 2026) and the need to commence randomisation promptly, the Centre for Homelessness Impact (CHI) convened a dedicated Grants and Evaluation Committee meeting to review and approve the randomisation process specifically.

The randomisation protocol was reviewed by CHI's Grants and Evaluation Committee, which included independent ethical scrutiny from Expert Advisors Prof. Ken Gibb and Rebecca Pritchard, alongside the Principal Investigator Prof. Michael Sanders (KCL) and CHI staff.

Ethical approval for CHI to conduct the randomisation was granted by the Committee in October 2025.

15.2. Informed Consent

Participants in the survey and interviews will be provided with a participant information sheet at the outset of the project, giving them details of what their participation will entail. KCL will collect opt-in consent for engaging in research activities. In some cases, for interviews, participants will be contacted by Southwark Council to determine their willingness to participate in an interview (in other cases, users will indicate openness to an interview in the user survey). Participants in interviews will have until 31 January 2026 to withdraw their data from the study; survey participants will similarly be allowed to withdraw their data, but only if they provided their contact details at the end of the survey.

15.3. Ethical Challenges

Key ethical issues relate to the risk of harm to participants as a result of taking part in the intervention, or by taking part in research activities (surveys, interviews).

To reduce risk of harm as a result of the intervention, Housing Helper has been designed to minimise the possibility of hallucinations, which could result in giving users incorrect information that may worsen their situation and/or reduce trust in the council. Further,

Housing Helper has been designed to refer high risk users to a human, allowing that user to get immediate help when needed. Please see the appendix for details on how the model has been trained and the safeguards in place.

To reduce risk of harm as a result of taking part in research activities, KCL will do the following:

- Vet all research materials, including recruitment materials, interview topic guides, and questionnaires, to ensure that potentially triggering content is minimised and participants are approached in a sensitive manner
- Ensure that all researchers who work directly with participants are properly trained
- Ensure that data are stored securely and that data minimisation principles are observed.

15.4. Risks

Please see the full risk register in Appendix A.

16. DATA PROTECTION AND SPONSOR INDEMNITY

16.1. Data Protection Statement

Data will be processed in line with the Data Protection Principles (Article 5 UK GDPR and Part 3 DPA 2018) and all other relevant data protection legislation, including setting out plans to prevent unauthorised/unlawful processing and accidental loss/destruction of Personal Data and securely transfer and receive Personal Data (in accordance with Article 32 GDPR), and keeping a record of processing activities (in accordance with Article 30 GDPR).

Personal data collected during this study will not be shared with any other body outside the members of the CHI-led consortium, the data controller, or other government departments who will be providing additional administrative data.

Relevant information about data protection for this project is set out in the Privacy Notice published by CHI, linked [here](#).

16.2. Legal Basis

The processing of personal data through the evaluation is defined under GDPR as a specific task in the public interest. Therefore, the legal basis for processing personal data is 'Public Task' (Article 6(1)(e)). The findings of the study are in the public interest because they will be used to inform policy decisions in reducing risk of homelessness.

The legal basis for processing special data is 'Specified consent' (Article 9(2)(a)). Participants will be informed in their information and consent forms that "We will be collecting data on your age, gender.", and they were asked to give explicit consent for this data to be collected.

The KCL data protection policy statement is linked [here](#).

16.3. GDPR Compliance

All data will be held according to the King's Data Protection Policy and Procedures. All data collection will adhere to ethical practice ensuring the confidentiality of information shared and the secure handling of data in accordance with the General Data Protection Regulation (GDPR) and King's Data Protection Policy. Participant data will not be transferred outside the EU. The legal basis for processing data in this evaluation is a 'public task'.

Prior to any interview or survey data collection, participants will be provided with a Participant Information Sheet which will explain the reason for collecting and processing their data, detail how long it will be stored for and if/how it will be shared with other parties and will provide them with the mechanism to ask that their data be removed or to raise a complaint. They will then provide opt-in consent to their data being processed as outlined in the PIS. Response data will be held separately from contact details, with access to each folder limited to those who have a legitimate need to access that data. Participant data will be linked using a pseudonymous ID number, with the matching key stored in a separate folder accessible only to the Principal Investigator or a nominated delegate.

Participants will be able to withdraw their personal data from the study until January 2026, at which point the data will be prepared for analysis. The research will end in October 2027, and personal data will be retained by King's for up to three months after the end of the research. It will then be transferred to CHI for archiving.

Further details on the personal data collected, how it is used and stored, as well as participants' rights in relation to this research are covered in the Privacy Notice.

16.4. Data Processing Roles

Joint Controllers (for the Project):

- Centre for Homelessness Impact (CHI);
- King's College London (KCL);
- Southwark Council (Southwark)
- Change Please (CP)

Processors (for the Project)

- Qualtrics (for KCL);
- GOV.UK Notify is built by the Government Digital Service - <https://www.notifications.service.gov.uk/> (Mass email tool used by Southwark);
- HubSpot - <https://www.hubspot.com/> (for Mass email and SMS, used by Change Please);
- Policy In Practice (for Southwark's management of the LIFT database)

Project Funders (Independent Controllers in their own right but do not have any decision-making capacity for this project and no participant personal data from the project is shared with them):

- Cabinet Office

Controller (for safeguarding / immediate risk of homelessness):

- Southwark Council (Southwark)

Processors (for safeguarding / immediate risk of homelessness):

- Change Please (for Southwark)

16.5. Data archiving

Data from this research will be archived using a systematic and secure process so that it can be accessed by approved researchers in the future for potential future analysis, verification, or responsible sharing in accordance with ethical guidelines and institutional policies. Upon completion of data collection, all data will be stored in an encrypted, access-controlled digital repository. Identifiable information will be removed or coded prior to storage to protect participant confidentiality.

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18. APPENDICES

Appendix A. Risk Register

Ref ID	Title	Risk Description and Impact	Date ID'd	Risk Cat.	Impact	Prob	Rating	Mitigations
PH01	Informed consent	Meaningful, informed consent can be challenging to gather in the case of at-risk adult (e.g. being able to explain the study with the right amount of detail, that it is fully optional, etc). Being able to show strong evidence of informed consent will be important from an ethical review perspective.	08/09/2025	Participant harm	3	2	6	We will develop recruitment materials that explain simply what participation involves; and what to do if they do not want to be involved or change their mind. We will brief Change Please and Southwark Council staff on the importance of users not feeling pressured to participate in surveys and interviews.
PH02	Study-related harm to participants	Potential study-related harm to participants can be divided into two categories: intervention-related harm and data collection-related harm. The former refers to any potential threat to a participant's wellbeing or housing status as a result of using the Housing Helper tool. This can include the tool giving incorrect or misleading information or failing to identify a person at risk and referring them to a human. The latter refers to any potential harm to wellbeing as a result of survey language or being part of interviews/focus groups (e.g. triggering trauma response).	08/09/2025	Participant harm	5	2	10	Survey instruments and topic guides will be reviewed by relevant ethics committees and internally to ensure high quality measurement and low risk of harm. Potential intervention-related harm is addressed through the monitoring framework that will be used to ensure that Housing Helper offers appropriate advice and does not hallucinate. Further, monitoring tools are put in place to ensure that information being provided is accurate.

PH03	Disclosure and safeguarding	In the course of data collection from participants through interviews and surveys, a participant may disclose information that indicates intent to harm/self-harm, previously undisclosed crimes, or other behaviours/situations that indicate the participant's or others' safety is in question.	08/09/2025	Participant harm	5	2	10	We have developed a Risk and Safeguarding Procedure that all researchers interacting with participants will adhere to, including an escalation procedure in the case of a safeguarding concern. All researchers will be trained in recognising and responding to participant distress.
PH04	Data security and privacy risk	Tracking homelessness duties and other measures necessitates the collection of sensitive participant data. Further, the study is interested in understanding how use of the tool might differ between those who are classed as at-risk in other ways outside of homelessness, including a history of domestic abuse and being care-experienced.	08/09/2025	Participant harm	4	2	8	All data collected by the project will be treated confidentially and securely and according to UK GDPR. A DPIA29 and Data Sharing Agreements will be agreed. Data will be stored and transferred compliant with ISO/IEC 27001:2013, following the information security procedures of each organisation. All administrative data collected will be anonymised and individual households will not be identifiable. Survey data will be collected anonymously, and very limited personal data will be collected, reducing possibility of identifiability.
PH05	Ethical considerations - council staff	There is a risk that council staff may be overwhelmed by the extra work involved in working on the trial and may experience additional stress during the trial period.	08/09/2025	Participant harm	2	2	4	Representatives of Southwark Council will have onboarding with a member of the research team so they can understand exactly what their role will be in the trial and confusion and the extra work required to fix mistakes is minimised. We will also develop resources for the council to minimise confusion and make next steps very clear. Staff will have the full support of the research team, and it will be made clear to everyone involved in the trial that they can ask for extra support to reduce their workload at any time.

EV01	Participant recruitment	We will be aiming to recruit 350-500 participants to comply with treatment, which may take time. It's possible that contact information in the LIFT dashboard is out of date, and we have trouble getting messages out.	08/09/2025	Evaluation	5	3	15	Engaging with the intervention should be made as easy as possible, while at the same time balancing potential harms and ensuring we gather the data needed for analysis. We will explore different types of encouragement messages in order to promote adoption and use various targeting in response to campaign performance metrics.
EV02	Participant attrition	The survey may be too long for some participants, or the language may be inaccessible for them. This may mean that the last few pages of the survey are less frequently answered.	08/09/2025	Evaluation	2	4	8	We will only ask necessary questions and keep the questionnaire as short as possible. We will clearly state on the front of the survey how long it should take. We will have our surveys reviewed to ensure they are of an appropriate reading level.
EV03	Intervention Fidelity	The model and architecture of the Housing Helper tool may change during the study, complicating our findings.	08/09/2025	Evaluation	3	3	9	Significant changes to the tool should be avoided during the trial period. If any overt changes to the model or tool UI/UX are made, they should be reported by Change Please to the research team, along with the date of changes. Based on this record, we can incorporate controls into the analysis to attempt to account for these changes.
EV04	Administrative data inconsistencies	As we plan to use data from one source (NEC) for the outcome measures, and from another source (LIFT) to identify participating households, there may be challenges in matching up these two sources.	08/09/2025	Evaluation	5	3	15	Undercounting duties owed could have the effect of reducing the likelihood of detecting an effect, possibly leading to a Type II error. To avoid this, we are working closely with Southwark during the planning stages to operationalise the matching and suss out feasibility.
PL01	Timelines	We are working on a very limited timeline before the interim report is due in March 2026, to comply with EAF requirements	08/09/2025	Project logistics	3	3	9	We have asked CHI to conduct the randomisation, rather than KCL, in order to ensure that the lengthy ethics review process at KCL does not hinder the start of the trial.

PL02	Timelines - Staff absences	Staff can fall ill, leave their positions, or otherwise be unavailable for extended periods, which could delay the project.	08/09/2025	Project logistics	3	3	9	Some staff absences are unavoidable, and our proposed project timeline is designed to anticipate some delays. To hedge against the disruption of a prolonged absence of a team member, we are utilising a shared folder of internal documentation/notes, so any ongoing project tasks are documented and can be picked up by another team member.
PL03	Timelines - Ethical approval	Since the research covers sensitive topics, we may need to go through multiple rounds of ethics approvals. This may delay the start of the qualitative data collection.	08/09/2025	Project logistics	2	3	6	We are taking a proactive approach with the ethics review, having already started gathering the materials and completing paperwork to get our request for review in as soon as possible.
PL04	Communication challenges	As with any project spanning so many organisations, there is a possibility that communication between teams will be insufficient to ensure that the intervention is correctly implemented, and the right data is collected and shared in a usable format.	08/09/2025	Project logistics	3	2	6	Internal communication will take place through a shared software platform (e.g. Slack) and a SharePoint folder will facilitate asynchronous collaboration over deliverables. Regular internal sync meetings will continue. External communication to partners will be facilitated through a designated relationship manager. Given the highly complex nature of this project, the research team and CHI will be meeting on a regular basis to discuss the progress of the project.
PL05	Unplanned work	Unforeseen challenges will arise, which can disrupt timelines, create communication challenges, and/or threaten the validity of the trial.	08/09/2025	Project logistics	2	3	6	Administrative staff support had been allocated for in the budgeting, as well as additional time allocation in the project Gantt charts.

Appendix B. Technical specifications – Housing Helper tool

Data sources (allow-list only):

- Shelter
- Advice Now
- GOV.UK
- Law Works
- Citizens Advice
- Legislation.gov.uk
- The user's local authority website (for this research, Southwark Council)

Retrieval-Augmented Generation (RAG) with hard gates

- **Search gate:** queries go first to an allow-listed Programmable Search Engine (PSE).
- **Evidence gate:** we fetch the top page(s), extract short passages, and **only allow answers that cite those passages**.
- **Refusal policy:** if no approved evidence is retrieved, the assistant **declines** and provides the correct official links instead.
- **Temperature: 0.0** (deterministic), Therefore this is grounded only on approved sources.
- **Citations:** every factual claim includes a page-level citation (URL + title shown to the user).
- **Freshness:** legal/official pages are revalidated (ETag/Last-Modified). GOV.UK/legislation have **no-stale** rules; charities use short TTL with **stale-while-revalidate**.

Bias & safety controls

- **Human-in-the-loop:** Tier 1/Tier 2 (crisis/high) cases are flagged and an email with the individuals details are sent to the council.
- **Red-team evaluation:** scenario sets covering age, disability, gender, immigration statuses, and family types; we check consistent risk banding and advice parity.
- **Language & accessibility:** plain English outputs; multilingual ASR + translation; large-font and screen-reader friendly UI.
- **No profiling:** we do **not** use protected characteristics to alter legal advice; scoring only reflects housing risk factors (e.g., notice dates, arrears).
- **Auditability:** every turn stores the prompt, sources used, and risk decision, reviewable by council QA.
- **Data minimisation:** only collect what's needed for advice/referral; PII is redacted from logs; retention limits are applied per the DPIA.

3) User journey (concrete examples)

Entry & consent

1. Resident clicks the council's email link → privacy/consent screen explains data use, opt-out, and emergency routes.
2. Resident chooses **chat** (web) or **voice**. Language preference offered.

Triage & safeguarding

3. The helper asks **short, plain questions** woven into conversation (safe place tonight, notice dates, arrears, health/children, DA risk).
4. **Crisis triggers (T1)**: immediate safety messaging + emergency lines + offer to connect to out-of-hours team.

Advice & evidence

5. The helper retrieves **approved guidance**, shows **key steps** (e.g., "You do not have to leave when a Section 21 notice arrives") with citations.
6. Offers tailored actions: **contact the housing team**, **DHP application**, **speak to landlord**, **letter templates**, **benefit calculators**, **specialist support**.

Referral / next steps

7. If resident opts in: collect minimal details to **create a Prevention Duty case**; confirm preferred contact method/time.
8. Resident can **download letters** (e.g., arrears plan, disrepair), **email themselves** a summary, or request a **call-back**.
9. Resident sees a **safety summary** + links; session ends with feedback prompt.

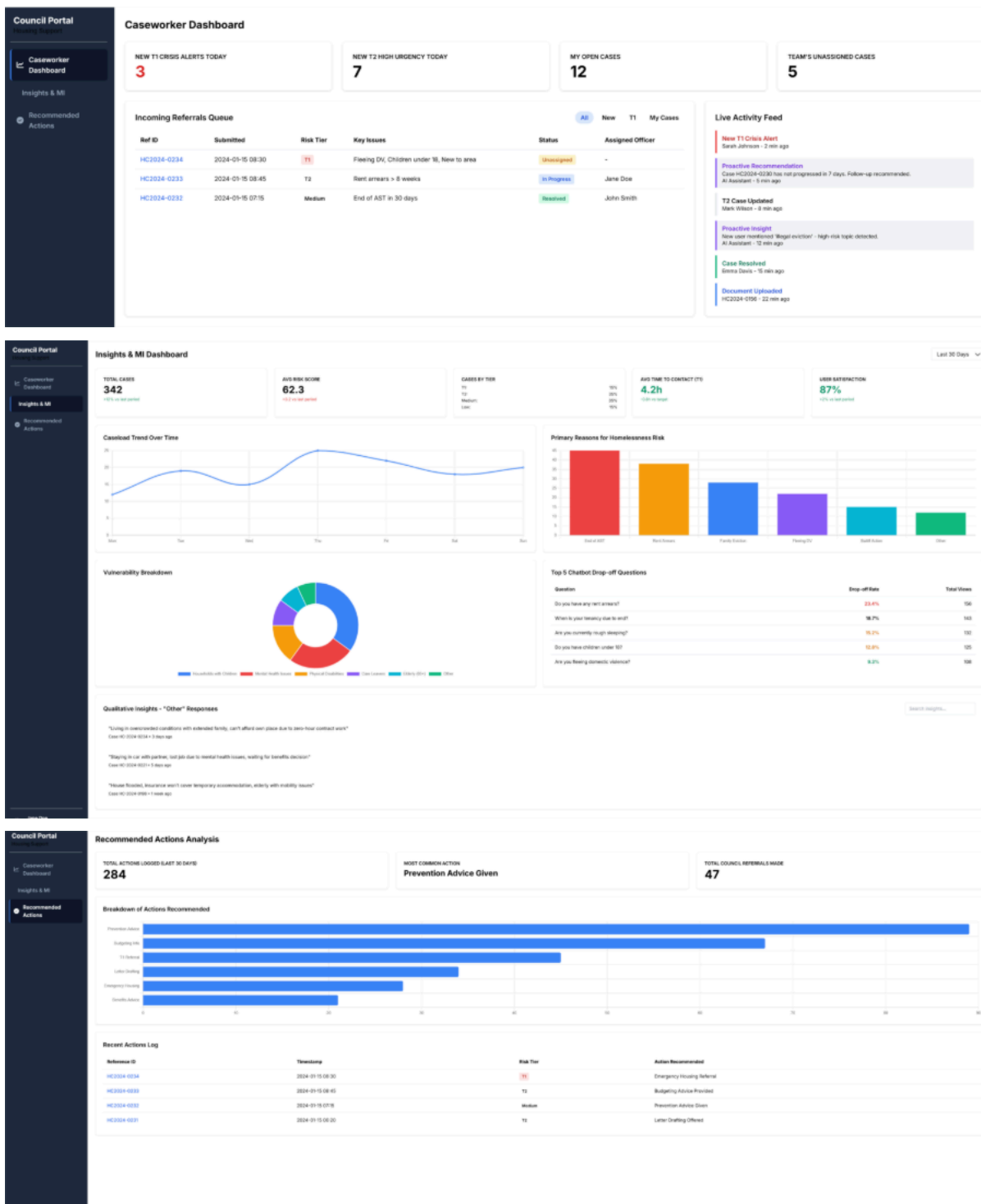
Scenario 1 — Section 21 within 28 days → Tier 2 (High)

- Helper validates the notice rules (2 months, form requirements), advises **urgent council appointment**, **payment plan template**, and **DHP**.
- Creates a **priority referral** with the evidence checklist attached.

Scenario 2 — No safe place tonight after leaving abuse → Tier 1 (Crisis)

- Shows **emergency options** (999 if unsafe), **Refuge 24/7 line**, and the local **out-of-hours** housing line.
- Offers to connect to the council's emergency team; flags T1 in the case notes.

4) "Share data captured by the AI tool" — what they want & what to show



Appendix C. User survey

Change Please Housing Helper Evaluation Survey

Consent Form

- ☐ Yes, I consent to take part in the research
- ☐ No, I do not want to take part in the research

If you ticked 'Yes', please continue.
If you ticked 'No', the survey will end here.

Demographics

Q1. How old are you?

- ☐ 18 to 24
- ☐ 25 to 34
- ☐ 35 to 44
- ☐ 45 to 54
- ☐ 55 to 64
- ☐ 65 or over

Q2: What is your gender?

- ☐ Male
- ☐ Female
- ☐ Non-binary
- ☐ Prefer to self-describe: _____

☐ Prefer not to say

Q3. Is English your first language?

☐ Yes

☐ No

☐ Prefer not to say

Q4. What is the highest level of education you have completed?

☐ Primary school

☐ Secondary school up to 16 years

☐ Higher or secondary or further education (A-levels, BTEC, etc.)

☐ University degree or higher

☐ Prefer not to say

☐ I don't know

Q5. What kind of accommodation do you live in at the moment?

☐ I live in property I rent from the council or housing association

☐ I live in property I rent from a private landlord

☐ I live in property rented or owned by friends or family

☐ I live in property I own

☐ Other, please specify: _____

☐ Prefer not to say

☐ I don't know

Housing Helper Use Questions

Q6: What did you use the Housing Helper for? Select all that apply. [Include picture of interface]

- ☐ Help with financial problems
- ☐ Help with a section 8 or section 21 notice (an eviction notice) from my landlord
- ☐ Help calculating the benefits I'm owed
- ☐ Help accessing specialist services (e.g. mental health services, domestic abuse services)
- ☐ Help accessing the council's housing services
- ☐ Other, please specify: _____
- ☐ Prefer not to say
- ☐ I don't know

Q7a: Did the Housing Helper refer you to Southwark Council? [show screenshot of referral message]

- ☐ Yes
- ☐ No

If answered "Yes" to Q7a

Q7b: How quickly were you contacted by a Southwark Council Housing Officer?

- ☐ In less than 2 hours
- ☐ In 2 - 24 hours

- ☐ In 24 – 48 hours
- ☐ In more than 48 hours

Q8a: The Housing Helper allows users to upload official housing letters and write response letters. Did you use the Housing Helper to upload or write a letter?

- ☐ Yes – I used it to upload a letter I received.
- ☐ Yes – I used it to write a letter.
- ☐ Yes – I used it to upload a letter I received and to write a letter.
- ☐ No

If answered “Yes – I used it to write a letter” OR “Yes – I used it to upload a letter I received and to write a letter” to Q8a

Q8b: Whom did you send the letter(s) to?

- ☐ My landlord
- ☐ A bailiff
- ☐ Southwark Council
- ☐ Other, please specify: _____

If answered “Yes – I used it to write a letter” OR “Yes – I used it to upload a letter I received and to write a letter” to Q8a

Q8c: What happened as a result of sending the letter? Select all that apply.

- ☐ I received a rent reduction
- ☐ I got some flexibility with my rent payments
- ☐ I got a payment plan/flexibility with debt repayments
- ☐ I got access to services I needed

- ☐ Nothing happened as a result of sending the letter
- ☐ Other, please specify: _____
- ☐ Prefer not to say
- ☐ I don't know

Q9a: What language did you access the Housing Helper in?

- ☐ English
- ☐ Other

If answered "English" to Q9a

Q9b: Did you know that you can access the Housing Helper in languages other than English?

- ☐ Yes
- ☐ No

If answered "Other" to Q9a

Q9c: Did you use the Housing Helper to translate documents into your preferred language?

- ☐ Yes
- ☐ No

If answered "Other" to Q9a

Q9d: How would you rate the accuracy of Housing Helper's translation into your preferred language?

- ☐ Very accurate
- ☐ Accurate

☐ Neither accurate nor inaccurate

☐ Inaccurate

☐ Very inaccurate

Q10: Did you approach Southwark Council for advice or assistance after using the Housing Helper?

☐ Yes

☐ No

Q11: Did you approach any organisation other than the council for advice or assistance after using the Housing Helper? (e.g. Citizens Advice Bureau, Shelter)

☐ Yes, please specify which organisation(s): _____

☐ No

Perceptions Questions

These questions are about how you found using the Housing Helper.

Q12: How **trustworthy** was the information you received from the Housing Helper?

1	2	3	4	5
Not trustworthy				Very trustworthy

Q13: How **useful** was the information you received from the Housing Helper?

1	2	3	4	5
Not useful at all				Very useful

Q14: How **easy** was the Housing Helper tool to use?

1	2	3	4	5
Very difficult				Very easy

Q15: How **friendly** was the Housing Helper?

1 Very unfriendly	2	3	4	5 Very friendly
----------------------	---	---	---	--------------------

Q16: How **comfortable** did you feel using the Housing Helper?

1 Very uncomfortable	2	3	4	5 Very comfortable
-------------------------	---	---	---	-----------------------

Q17: Now that you have used the Housing Helper, how would you prefer to get housing advice in the future?

- ☐ From the Housing Helper
☐ From a housing officer
☐ Other, please specify _____
☐ I don't have a preference

The questions on the next page are sensitive.

We will ask you about whether you have experienced domestic abuse, whether you have been in care, and about debts you may have. They are all "yes/no" style questions, and we do not ask for further detail. We are asking you these questions because we want to find out if having experienced these things changes how you use the Housing Helper, and whether your outcomes are different. You can choose to skip any questions you don't want to answer.

If you do not wish to see these questions, click "Skip" below, and you will automatically skip the next page. If you are okay with seeing these questions click "Next".

Q18: Have you experienced domestic abuse?

- ☐ Yes
☐ No
☐ I don't know
☐ Prefer not to say

Q19: Were you placed in the care of a local authority (e.g., foster care, children's home) before the age of 18?

- ☐ Yes
- ☐ No
- ☐ I don't know
- ☐ Prefer not to say

Q20: Please indicate if you have any of the following debts (select all that apply):

- ☐ Rent arrears
- ☐ Council tax arrears
- ☐ I don't know
- ☐ Prefer not to say

Thank you for completing the survey! At this stage, you may choose to provide us with your contact information if you wish. If you are not interested in providing your contact information, feel free to skip this section and simply press the "Submit" button below.

We are collecting this information for three purposes:

- (1) participants can receive the report at the end of the study
- (2) participants can be entered into a lottery to receive a £500 voucher, as a thank-you for participating in the survey, and
- (3) participants can be invited to take part in a follow-up interview, over the phone or online, to learn more about your experiences using Housing Helper.

If you are interested in any of the above, please enter your contact details below, and then tick the boxes for the activities you are consenting to (you may choose to consent to any or all activities, as you wish):

Name: _____

Email address: _____

Phone number: _____

- I would like to receive the report when the study is finished
- I would like to be entered into the lottery to receive a voucher as a thank-you for participating in the survey
- I consent to be contacted for the purposes of a phone or online interview with the research team, to better understand my experiences using Housing Helper

Finally, if you feel like you need support with any issues discussed in this survey, or for other challenges, please consider reaching out to one of the below organisations:

The Samaritans

Phone: 116 213

Email: jo@samaritans.org (response time is 24 hours)

Website: <https://www.samaritans.org>

Mind

Phone: 0300 123 3393 (working hours only)

Email: info@mind.org.uk

Website: <https://www.mind.org.uk/>

Women's Aid

Website: <https://www.womensaid.org.uk/information-support/>

Phone: 0800 731 8147

Money Advice Service

Phone: 0800 138 7777 (Mon-Fri, 8am-6pm)

Website: <https://www.moneyadviceservice.org.uk> (webchat available)

Appendix D. Safeguarding protocol

This document details the safeguarding approach at The Policy Institute at King's College London (KCL), particularly for the conduct of research with children and young people under the age of 18 (CYP) or vulnerable adults. This document sits under the broader KCL safeguarding policy, which can be found [here](#).

Ethical clearance

Ethical clearance from the KCL College Research Ethics Committee (CREC) or subcommittees is required for all primary data collection involving human participants in projects classified as research. The research ethics process requires researchers to consider and manage ethical issues such as obtaining free and informed consent, protection of confidentiality and management of safeguarding and risks. KCL researchers have a responsibility to protect the rights, dignity, health, safety and privacy of research subjects. Research should also comply with any relevant legal and regulatory standards, as well as professional codes and local guidelines for conduct. The KCL Research Ethics Policy can be found [here](#).

For King's sponsored research, the researcher with ultimate responsibility for safeguarding of participants in the research will be the Principal Investigator, or a nominated delegate. The Principal Investigator (or delegate) will work within the overarching KCL framework, in liaison with the KCL Designated Safeguarding Officers for the Faculty of Social Sciences and Public Policy, and the Research Ethics Office.

As part of ethical clearance, where safeguarding risks are identified, the Research Team submits an approach to responding to safeguarding risk as part of the ethics submission. Where a project is likely to raise complex or urgent safeguarding risks (e.g. research relating to vulnerable CYP or mental health), the team will prepare a full Risk and Safeguarding Protocol as part of the ethics submission.

Children and young people

Research involving children and young people is subject to the same ethical and governance requirements of any research involving human participants. However, undertaking research with children and young people can also raise specific ethical and governance issues that will need to be considered when planning such a project. For the purpose of this policy, we focus on safeguarding approaches for all CYP, as well as specifically vulnerable CYP or projects that are likely to raise specific safeguarding risks (e.g. those relating to mental health or youth violence).

Vulnerable adults

Researchers will need to consider additional ethics concerns or issues arising from working with potentially vulnerable people. Vulnerability may be defined in different ways and may arise as a result of being in an abusive relationship, vulnerability due to age, potential marginalisation, disability, and due to disadvantageous power relationships within personal and professional roles. Participants may not be conventionally 'vulnerable' but may be in a dependent relationship that means they can feel coerced or pressured into taking part, so

extra care is needed to ensure their participation is truly voluntary. Researchers will need to assess potential vulnerability within the context of the research, in terms of potential consequences from their participation (immediate and long-term) or lack of positive impact where this is immediately needed or expected.

Safeguarding participants in projects not classified as research

Projects classified as service evaluation do not come under the CREC and are not subject to ethical review. However, an ethical opinion can be sought from CREC for non-research and the Policy Institute will seek this for projects where significant ethical or safeguarding dimensions are identified – subject to CREC's willingness to review the project and provide an ethical opinion. The safeguarding approach outlined in this document will be followed for all Policy Institute research, regardless of whether ethical clearance is required.

Overarching safeguarding approach

This section outlines the overarching safeguarding approach to be taken by Policy Institute researchers. In general, due to the nature of the research the Policy Institute conducts, we will work within the safeguarding framework set down by the gatekeeper or delivery partner (see below). This is to be adapted as appropriate for individual projects.

For the purpose of this policy, the following definitions apply:

- **Research Team:** Anyone in King's (or partner organisations) who interacts with participants.
- **Responsible Delivery Organisation:** The organisation through whom the participant was identified or recruited (e.g. the educational setting; service delivery charity; etc) and whose safeguarding framework the research will work within. If participants are being recruited directly by King's without reference to a gatekeeper or delivery organisation, then King's will act as the Responsible Delivery Organisation.
- **Safeguarding Lead:** Nominated staff member responsible for safeguarding within the Responsible Delivery Organisation.
- **Case Contact:** The individual within the Responsible Delivery Organisation who is identified as the key support person for any individual participant; e.g. a teacher, support worker or the Safeguarding Lead).

Definition of Risks

Research Team members should use their own professional judgement regarding any situation or issue in which risk of harm to a participant or others may be reported or inferred. In this section we provide examples of different types of risks that may arise.

Urgent risks

Urgent risks are any risks where the researcher has reason to believe the participant or someone else is in immediate danger. Researchers should consider any of the following to suggest an urgent risk, especially in combination:

- Disclosure of a clear and imminent suicide plan, or disclosure that they have already acted in a way that puts their life in immediate danger

- Disclosure of a clear and imminent plan to harm someone else (or a plan to act in a way that will harm them and others e.g. stepping out in front of a train)
- Severe distress (e.g. crying, aggression, agitation, withdrawal), unstable mood observable by the researcher, or signs of self-harm evident
- Disclosure of actions suggesting an immediate risk of drug overdose (accidental or intentional)
- *In combination with others:* Disclosure of access to a weapon or other means of harm (e.g. medicine, cutting tools)
- *In combination with others:* Disclosure of suicidal thoughts or feelings of hopelessness/helplessness
- *In combination with others:* Disclosure that the participant is alone and/or feels they are experiencing a breakdown in their social circumstances
- *In combination with others:* Disclosure of a history of self-harm, harm of others, or attempted suicide
- Any information that causes the researcher concern that the participant may be in immediate danger
- Any information that causes concern regarding the safety of others

Non-urgent risks

Non-urgent risks are any risks that cause the researcher concern about potential harm to the participant or others, but where there is not an indication that the danger is severe and urgent. These may include:

- Signs of distress (e.g. crying, aggression, withdrawal)
- Concerningly low scores on wellbeing measures or disclosure of suicidal intention or ideation
- Disclosure of an increased level of substance use
- Any information that causes concern regarding the participant's wellbeing or safety, but that does not suggest an urgent risk.

Process

At the beginning of the research

For research with CYP or vulnerable adults, participants' rights to confidentiality are superseded by the need to ensure safeguarding risks are adequately responded to.

For projects with CYP or vulnerable adults, or covering topics that are more likely to result in safeguarding disclosures (e.g. mental health, crime), participants should be informed in the Participant Information Sheet and reminded at the beginning of any research interaction that their confidentiality will be maintained unless they share something that causes the researcher concern about their safety or that of another person, in which case the researcher will need to act on that information.

The researcher should seek the participant's verbal consent for any referral or escalation of the safeguarding risk, especially if the participant is over the age of 16; however, it should be made clear to the participant that the researcher may refer or escalate the disclosure

without the participant's consent if there is significant concern about their safety or that of another person.

For projects where the risk of a safeguarding issue is low, and therefore the only action is likely to be signposting to support services, confidentiality can be promised but it should be made clear to both the Responsible Delivery Organisation and the participant that no further action will be taken by the Research Team in this context.

During interaction with the participant

If, during the course of interaction with a participant, a member of the Research Team hears or observes something that gives cause for concern, the following actions will be undertaken in the first instance.

If the identified risk is urgent:

- The researcher should try to stay with the participant (or keep them on the phone) until they are satisfied that the risk is being responded to and the participant is no longer at immediate risk of harm.
- The researcher should call 999 or ask someone else to call 999. If appropriate, the researcher can try to ensure a family member, friend or staff member is present to provide required support (e.g. taking the individual to the emergency room).
- For children and young people, the researcher should call 999 or contact the Multi-Agency Safeguarding Hub (MASH), depending on which is appropriate.

If the identified risk is non-urgent:

- The researcher should offer the participant the opportunity to pause or take a break from the questionnaire or interview and ask whether they would like to resume or terminate data collection.
- The individual should be asked there is someone they would like to contact for support.
- If possible, the researcher should try and stay with the participant (or keep them on the phone) until someone else is present or the researcher is satisfied that the individual is no longer distressed.
- If the participant asks the researcher for support, they should be signposted to local resources and support, including the Case Contact within the Responsible Delivery Organisation, as per Section 2.3 of this protocol.
- The researcher may offer to inform the Case Contact and seek the participant's verbal consent to do this.

Immediately following interaction with the participant

Should a risk arise during research participation, the researcher should take the following steps, immediately after ending the questionnaire or interview:

1. Note the event on the questionnaire or interview transcript, if applicable.
2. Report the concern to the Principal Investigator (or delegate).
3. Draft a written note of the relevant concerns as soon as possible to avoid loss of memory in relation to their concerns. For interviews, researchers should also refer to

the audio recording to ensure details are accurate before logging in the project-specific logbook (outlined in Section 2.2.5).

4. Respond to any queries or instructions the Principal Investigator (or delegate) or Safeguarding Lead may have.
 - If a risk arises during interaction with participants regarding participation in the research, withdrawal from the research, debriefing or proactive contact, the researcher should follow steps 2-4, above.

For children and young people, the researcher should contact their school's Designated Safeguarding Lead, or ask someone else to contact the DSL, if the participant is in school at the time of the interaction. If they are not in school, and/or it is outside of term time or school hours, then the researcher should contact the duty or front door team or Multi-Agency Safeguarding Hub of the local authority in which they are resident. If the child is known to be in care, and to be placed outside of the local authority (an out of authority/out of borough placement), the researcher may also wish to alert the local authority which has responsibility for their care.

Within three working days of the interaction

The Principal Investigator (or delegate) will discuss the incident with the researcher and the Safeguarding Lead, in order to decide what action to take.

All researchers will have space to debrief with the Principal Investigator (or delegate) after every interaction, should they need to report a safeguarding concern. This space for reflection and consistent support will ensure that ambiguous or unclear safeguarding disclosures can be reviewed, and the most appropriate course of action decided in a timely manner. The concern raised and action taken will then be logged in a centralised project-specific logbook that is securely stored and limited-access to the Research Team only.

If the Principal Investigator (or delegate) is satisfied that the safeguarding concern was sufficiently addressed by the researcher at the time – for example, via signposting to support services – then no further action may be required in relation to the concern.

If the Principal Investigator (or delegate) considers that the safeguarding concern warrants further action, a referral may be made to the Responsible Delivery Organisation. In this context, the Case Contact or Safeguarding Lead for that participant will be notified of the concern and what actions have been taken to date. This will be done as soon as possible, and within 72 hours of the interaction. For interactions with CYP in educational settings, all safeguarding concerns raised, regardless of severity or urgency, will be referred to the Safeguarding Lead as soon as possible.

Ongoing monitoring

All safeguarding concerns raised will be logged by the Research Team. Where a concern is notified to the Responsible Delivery Organisation, the Case Contact will keep the Principal Investigator (or delegate) apprised of any developments, and the Case Contact or Principal Investigator (or delegate) may initiate a discussion with the Case Contact about whether it is

safe for the participant to continue to be part of the research, with the outcome of this discussion documented in the safeguarding log.

Reporting disclosures to the police

Generally speaking, the Research Team will not report disclosures of illegal activities by participants to the police.

Any disclosure of illegal activities will be handled in the first instance in terms of risk of harm to the participant or others (per the guidelines on urgent and non-urgent risks given above). For instance, if the researcher comes into information that leads them to believe there is an urgent safeguarding risk relating to an illegal activity, they may deem it necessary to notify the police immediately via 999. However, if possible, the researcher should first discuss this with the Principal Investigator (or delegate).

In general, the Research Team will be conscious of the fact that unless the researcher has actually seen an offence being committed or has obtained knowledge of the location of proscribed drugs, illegal weapons or stolen goods, information obtained in the course of research is likely to be unreliable and to be considered hearsay. The team will also be conscious that participation in research should not place people in greater hazard than they would otherwise experience in their daily lives, and this includes reporting of their activities to authorities where this wouldn't otherwise occur.

However, if a participant makes a disclosure relating to any of the following types of offenses, this may raise a legal or moral duty to report:

- Child protection offences.
- Physical abuse of vulnerable adults.
- Money laundering and other crimes covered by prevention of terrorism legislation.

If a participant makes a disclosure that the researcher believes falls into one of these categories, they should follow the procedure in Section 2.2.4, to respond to and document the disclosure.

The Principal Investigator (or delegate) will then review and consider the information and whether it represents a credible disclosure of an illegal activity in one of the above three categories. They may also discuss it with the Responsible Delivery Organisation in order to determine whether it is appropriate to report the disclosure to the police.

If the Research Team expect that the subject of the research means that this type of disclosure is likely, participants should be informed in the Participant Information Sheet that if they make a disclosure relating to one of the above three categories, the Research Team may need to report it to the police.

Referral to support services

Prior to launch of a project, a list of age- and project-appropriate signposting resources will be developed and agreed between the Research Team and the Responsible Delivery Organisation. This may either be to online resources, general support services (e.g. the Samaritans), or dedicated support services (e.g. the Case Contact and Safeguarding Lead).

Requirements for researchers involved in research with CYP or vulnerable adults

Training

All King's researchers must be up to date with King's College London's safeguarding training before being deployed on any project involving CYP or vulnerable adults.

All members of the Research Team must attend training on identifying and responding to urgent risks, including mental health risks, before they are deployed on any projects with CYP or vulnerable adults. Researchers should also receive an induction to the project, likely safeguarding dimensions, and the project-specific safeguarding procedure prior to be deployed on the project.

Disclosure and Barring Service checks

When researchers visit schools in England, for instance when interviewing staff and pupils, they must provide evidence of a Disclosure and Barring Service clearance (DBS check). The eligibility for different levels of DBS checks (basic, standard and enhanced) depends on the type of activity and are outlined in the [DBS eligibility](#) guidelines on GOV.UK. The heads of teams (e.g. the Director of Evaluation) are responsible for maintaining dedicated procedures for ensuring that relevant staff have the appropriate level of DBS checks in place.

In practice, due to the prospect that researchers will need to be left alone with children (e.g. school staff unexpectedly not available to supervise) we only send researchers to nurseries, schools and college settings when they have an enhanced DBS check, and repeated checks are carried out at least every three years, even if researchers are only expected to interact with children and young people in a 'supervised capacity'.

Safeguarding researchers

Upholding the safety of all members of the Research Team, along with participants, is a priority. The following steps will be taken to ensure that project staff are able to access support, should the need for this arise during the course of the research.

- Each researcher will be matched with a 'buddy' (e.g. a senior researcher with safeguarding expertise) to check-in with regularly.
- Training in issues including vicarious trauma will be provided to ensure researchers feel appropriately equipped to manage difficulties arising from potential safeguarding concerns.
- Regular team discussions and debriefs to share experiences, lessons and best practices will occur to facilitate knowledge sharing within the team.
- Researchers will be reminded of the Employee Assistance Help line by line managers during regular meetings.

Additional guidance

Researchers should familiarise themselves with the KCL additional guidance on conducting research involving children and young people [here](#). It includes information on:

- When to classify CYP as 'vulnerable' when making an application to the Research Ethics Committee

- Considerations about informed consent, for different age groups, and different methods of obtaining consent from children and parents
- Considerations when drafting recruitment documents, such as information sheets and consent forms
- Safeguarding, child protection and limits to confidentiality.

Non-compliance with safeguarding policy

The broader KCL safeguarding policy describes the approach to non-compliance with the safeguarding policy, which applies equally to research with children and young people. The university expects all university staff, students, and associated personnel representing the university or who contribute to its activities to follow the guidance on safeguarding and to promote the welfare of children and adults at risk. Failure to follow this guidance and procedures may not necessarily constitute abuse, but it is nonetheless a matter of concern for the university and may lead to disciplinary action.

If an individual is concerned that another member of the King's community is not following the guidance and procedures, they should contact their own project coordinator, line manager, local Designated Safeguarding Officer or the Lead Safeguarding Officer of the appropriate area. See Procedure 1 in the broader KCL policy for further information.

Appendix E. Southwark Housing Needs Information Pack

What assistance can Housing Needs Provide?

You should contact us if you need advice on the following:

- You are private renting and experiencing issues with your landlord / disrepair issues / have been issued a notice / are struggling to pay your rent.
- Your existing accommodation arrangement is being brought to an end.
- You are being asked to leave by family or friends.
- Your current property is overcrowded or unsuitable for you and/or your household.
- You are rough sleeping and need help to find a new accommodation.
- You need help to manage to a tenancy or require supported or sheltered housing.

How to contact us and what to expect

You can contact the service in the following ways:

- Calling us on **02075254140**
- Emailing us at Housing.Options@southwark.gov.uk
- If you are not able to contact us in the above ways you can visit us in person at **25 Bournemouth Road, Peckham, London, SE15 4UJ**, but please note that this is an appointment only building or for those who are digitally excluded
- If you are receiving support from another service or organization, you can **ask them to complete a referral on your behalf**, and we will contact you back

When you first contact us, you will speak to our **Gateway customer service team**. Our specially trained officers can provide detailed advice that is tailored to the needs of each particular customer.

The team will provide detailed advice if you are experiencing the following issues:

- You are homeless or threatened with homelessness and want to make a homeless application under Part VII of the Housing Act (1996.)

-
- You are fleeing domestic abuse.

-
- You need advice about what benefits and services you are entitled to depending on your immigration status and personal circumstances.

-
- You have issues with your private landlord, or your accommodation has disrepair issues.
-
- You have substance misuse issues and need advice regarding what services are available.
-
- You need advice regarding downsizing if you are a council tenant.
-
- Any other housing related query.
-

Once the Gateway customer service team establishes your personal circumstances and provides detailed advice. They may contact your landlord, relative or friend to mediate on your behalf to prevent homelessness.

They may also refer you to a specialist team for further assistance.

We may not be able to provide you with **emergency accommodation** when you contact us. Anyone can ask for homeless help but not everyone can get emergency housing.

The council must provide emergency housing if they think you might:

- be homeless
- be eligible
- have a priority need because of children, pregnancy, domestic abuse, or anything else that makes you vulnerable or at more risk of harm

We try and find temporary accommodation in South East London where we can, but this is not always possible. If this isn't possible, we will arrange temporary accommodation for you somewhere else. This could be anywhere in or outside of London.

If we cannot provide you with emergency accommodation, you will need to make arrangements with family and friends to stay with them whilst you look for a private rented property.

You may be asked to provide some initial documentation (listed below) such as ID and evidence of homelessness so that the team can assess you for an appointment.

What documents do I need?

Important please read the following notes below:

1. We have listed below the documents we need you to show us in order to book you in for a homelessness assessment.
2. Unfortunately, if you do not bring in the documents we need this will delay our assessment of your case and may delay the help we can offer you.
3. You will be offered an appointment via telephone or in person, so please make sure you know which you have been given.
4. If your interview is a telephone interview, please have the documents sent to us prior to your assessment if possible.
5. Please make sure you read the documents required for your specific housing issue.

Details of your appointment

- **Please note that appointments are given in person and over the phone so please confirm which you have been offered**

The date and time of your Housing Needs Interview Appointment is:

Date: _____

Time: _____

In person / telephone

* **Important:** Please be ready 15 minutes before your appointment time

Identity and eligibility for assistance: Documents we need to see to identify you and your household members - Provide as many of the following documents that you have	
*These documents cannot be used as proof of eligibility for assistance	
Passport	
Immigration Status Documentation - an Immigration Status letter issued by the Home Office, Border and Immigration Agency or UK Border Agency to the holder with an	

endorsement indicating that the person named in it is allowed to stay indefinitely in the UK or has no time limit or limited entry on their stay in the UK, or any restrictions on public funds	
Full Birth certificates	
Child benefit award letter or proof of payment going into your account	*
Drivers' license	*
Biometric Card Important to note: bring the card and the letter and any correspondence that came with the card. Do not just bring the sheet of paper the card was attached to.	
National Insurance number if not shown on other documents	*
Share codes for immigration status	
Address: Documents we need to see to confirm where you live now and in the last 5 years (Provide the following information in for any property you have lived at in the last 5 years).	
Council tax receipt/demand/letters	
Gas/Electric/Water rates bills	
Bank statements with address on	
Letters from any benefit agency DWP or Housing Benefit with address and name listed	
Make sure you bring in the contact details for any landlord/relative where for each address where you have lived for the last 5 years	
Any Benefits paperwork including award of benefits letters issued by Job Centre Plus, the Housing Benefit Department of the Local Authority or HMRC	
Pregnancy – If you are pregnant these are the documents we need to confirm that you are pregnant. Please provide all the documents you have	
Maternity pregnancy certificate	
Antenatal booklet held by you	
Antenatal card	
An official headed letter signed by your doctor or Midwife	
Copy of any letter from the GP to the hospital seeking an appointment	

Appointment for a scan and any scan details letter from the hospital	
Where children don't live with you all of the time – what we need to see	
Any court decision/settlement setting out the arrangements for children	
Any solicitors letters/e-mails about the arrangements for children	
Confirmation of Child Benefit or Child Tax Credits where this benefit is paid to you	
Name and contact details for your children's other parent where they live part of the week or all week	
ADDITIONAL DOCUMENTS FOR SINGLE PEOPLE OR COUPLES WITHOUT CHILDREN ONLY	
Prison discharge papers and licence conditions	*Prison Leavers Only
Any letters from probation or any service for offenders	*Prison Leavers Only
Details of spouse or partner you are estranged from. <i>This will not be applicable for issues of domestic abuse</i>	
Cessation of service documentation and any medical reports if you have left service due to or partly due to a medical condition.	* Armed forces only
Income and Financial information: We may need to see income and financial details to help us assess what help to give you	
2 months or 5 weeks pay slips or 2 months bank statements if paid directly into your bank account	
Bank statements for you and any partner on the application for the last 6 months	
Information on any debts (E.g. statements, repayment arrangements, letters from creditors)	
Details and confirmation letters for any benefits received or proof of the benefit being paid into your bank account	

Evidence of any Savings or income from savings	
Medical information for you or for any family members living with you	
Details for any medical conditions for you or a member of your household	
Name and address of any GP or consultant	
Any medical reports for you or any member of your household for a current medical condition	
Name and address of any support agency helping you or a family member with your medical condition	
Any letters reports from your doctor, any health consultant or service	
Copies of any current or recent repeat prescriptions	
Details and any letters concerning any hospital treatment you have had in recent years	
Contact details and any letters relating to any treatment you are currently receiving from any hospital or health consultant including your GP. <i>(Note you do not need to obtain a letter from your GP to bring to the interview).</i>	
Tenancy agreement or joint ownership confirmation such as mortgage statement or completion paperwork	
Contact details for any agency currently supporting you and any letters, e-mails from them to you	
Your Housing Problem – the reason you are approaching for assistance	
Copies of any Police reports and Police Crime Reference number	Harassment / domestic abuse
Legal documents such as injunctions that you have ever obtained	Harassment / domestic abuse
Any letters from your solicitor if you have one	Harassment / domestic abuse
Any letters or e-mails from any agency helping or supporting you	Harassment / domestic abuse
Anything else you think is important for us to see such as a GP's letter/report on how the domestic abuse is impacting your health.	Harassment / domestic abuse

Notice to leave your property – This will be likely to be called a Section 21 notice or section 8 notice	Private Rented tenants / license holders
Any letters/e-mails from any agency involved including your landlord if it is a council or housing association home	Private Rented tenants / license holders
Copy of your tenancy or licence agreement	Private Rented tenants / license holders
Any letter written by you to the landlord if you have complained about problems with the property	Private Rented tenants / license holders
Tenancy deposit protection details given to you by the landlord if you paid the landlord a cash deposit	Private Rented tenants / license holders
Any paperwork you have received from the court concerning any possession action taken by the landlord such as a court summons, particulars of claim notification form, or possession granted letter.	Private Rented tenants / license holders
Any notice of eviction warrant from the court bailiff	Private Rented tenants / license holders
Evidence of rent payments to the landlord i.e. a rent book or if rent paid from bank account bank statements	Private Rented tenants / license holders
Anything else you think is important for us to see such as a doctor's letter/report on how the housing conditions where you live is impacting on your health or the health of anyone else in your family.	Private Rented tenants / license holders
The contact details for any relative/friend who is asking you to leave their home	Asked to leave by family/friends
A letter/note from your parent, relative or friend asking you to leave along with a copy of their ID and proof of address	Asked to leave by family/friends

The appointment process

If you are booked for an appointment with a caseworker you will need to provide some more information on your situation including more of the documents above. The Housing Needs service has a duty to provide advice and assistance; we will also register a homelessness application for all customers who need one.

Your caseworker will assess your situation and provide you with a **personal housing plan if you are eligible and threatened with homelessness or homeless at the time of the appointment.**

- Homelessness – Are you homeless or threatened with homelessness?
-

- Eligibility – Do you have recourse to public funds?
-

If your caseworker is satisfied that you are homeless/threatened with homelessness and eligible then you will be issued a personal housing plan (PHP). The PHP outlines what duty is owed to you by the council. The duties are outlined below:

- **A Prevention Duty** - Where a local authority is satisfied that an applicant is threatened with homelessness and eligible, it must take reasonable steps to help the applicant secure that accommodation does not cease to be available for their occupation.
- **A Relief Duty** - Where a local authority is satisfied that an applicant is homeless and eligible, it must take reasonable steps to help the applicant secure that accommodation becomes available for at least six months.

If you are not eligible, you will be provided with a letter explaining this along with the reasons behind this decision. You can have this decision reviewed by a reviews officer if you do not agree with it.

The steps in your Personal Housing Plan outline what is expected from yourself and the council in order to prevent or relieve homelessness. These steps will include contacting your landlord or agent, signposting to the debt and money advice teams and assistance with the renting in the private sector through our Private Sector self-help scheme.

If we are unable to relieve your homelessness, your caseworker will then also consider the five criteria's below and issue you a decision letter outlining if any further assistance can be offered to you:

- Priority need – Are you pregnant, have children or vulnerable for any other reason?
-

- Intentionality – Investigation into the cause of your homelessness.
-

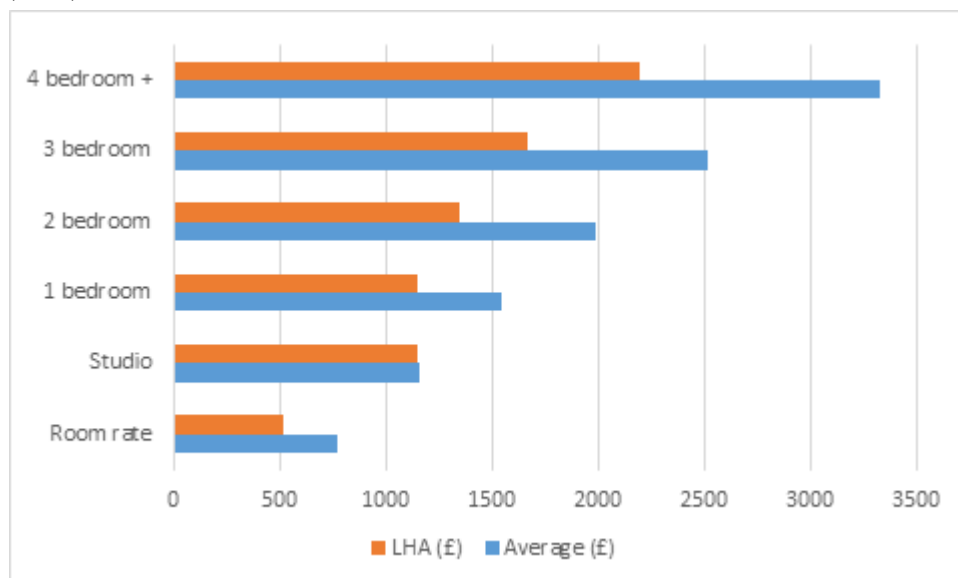
- Local connection – This will only be assessed at the end of the decision making process and will not apply to all applicants for example those fleeing domestic violence

Help looking and moving into private rented accommodation

If you are homeless or threatened with homelessness, we can help you with looking for a suitable property in the private sector. You may also be able to claim Universal credit to help with paying your rent. You can find out more about this at [Benefits - GOV.UK \(www.gov.uk\)](https://www.gov.uk/benefits)

You can also work out the maximum amount of help towards your rent you may be eligible for here: <https://lha-direct.voa.gov.uk/>

You will need to consider locations outside of Southwark and even outside of London. Market rents in Southwark are some of the highest in London. The chart below shows the average rents in the borough by bed size compared to the maximum paid by Universal Credit (LHA).



The Private Sector self-help scheme and our Housing Supply Team can assist you financially to secure accommodation. Landlords or agents have traditionally asked for a month's rent in advance and a month's deposit when they let their properties. Many people on benefits or on a low income cannot afford this. Under this scheme the council will make a one-off payment to landlords depending on the size of the property. This is paid after the tenancy has started. The landlord needs to offer a tenancy of at least 12 months however, it

is hoped that customers will want to stay for much longer. The property we will help you to secure will be affordable and suitable as determined between yourself and your caseworker.

Viewing and Signing up for a private rented property

You should go and view the accommodation and read any associated paperwork before you agree to move in or sign any agreements. Beware of internet scams – and do not give any money up front until you are certain that the letting is a genuine one. If the property is very cheap and appears too good to be true, it probably is. Take a friend with you or let someone know where you are going for safety reasons and for a second opinion. Be sure to check the following:

- The tenancy agreement; make sure you can afford the rent

- Doors and windows can be securely locked

- Heating, lighting and plumbing are in good working order

- The landlord has a valid gas safety certificate for any gas appliances

- The cost of council tax, water rates and average gas/electric bills

- The location

You will usually be granted an Assured Shorthold Tenancy (AST). Tenancies will normally be for six months or one year initially. This can usually be extended at the end of the term. You will have reduced rights if your landlord lives in the property with you.

The time scales for finding a suitable property to rent in the private sector depends on how active you are with your search. You are likely to find that not all landlords will accept people who are in receipt of benefits or not working.

More advice on how to secure a private rented accommodation from Shelter can be found here:

https://england.shelter.org.uk/housing_advice/private_renting/how_to_find_landlords_who_accept_benefits

Having trouble paying your rent

If you're having trouble paying your rent you can contact the following services:

Council/housing association tenants – contact your income officer in the first instance and/or the financial inclusion team to discuss DHP (Discretionary Housing Payment). Anyone wishing to claim DHP must have an active housing benefit claim.

Private tenants – contact the financial inclusion team - <https://www.southwark.gov.uk/benefits-and-support/housing-benefit/get-extra-help>

You can also contact **Universal Credit** for help with your rent. You can use the council's Benefit calculator to see if you qualify for benefits. Just go to [Benefit calculator \(entitledto.co.uk\)](https://www.entitledto.co.uk)

What other things should I do?

- Before you speak to us, it is very useful to have an **active benefit claim** with Universal Credit. This helps us to determine your income and affordability for properties we may help you find. You can apply for Universal Credit here: <https://www.gov.uk/how-to-claim-universal-credit> . It takes an average of 5 weeks for a claim to be processed so the earlier you apply, the more likely it is that we will be able to complete an affordability assessment with you.
- If you need free, confidential, independent and impartial advice to help resolve your problems with money, housing, employment, legal issues, and much more you can contact the **Southwark Citizens Advice** - <https://www.citizensadvice.org.uk/southwark/> - who offer advice in person and online.
- If you are looking for work, you should attend the **Job Centre** who can offer advice on all benefits including Universal Credit
- If you need help with training, CV writing or looking for work, speak to **Southwark Works** who offer a range of services in this sector - <https://southwarkworks.com/>

- If you have found a property to move to, or have been offered a property, and need help with white goods and furnishings. The following services may be able to help:
 - SASS - <https://www.southwark.gov.uk/benefits-and-support/emergency-support>
 - Turn2Us - https://www.turn2us.org.uk/?gclid=EALaIQobChMIsIXh8ta2ggMVz9_tCh321QCWEAA_YASAAEqJL_D_BwE

Council/Social Housing Waiting List

- The Council manages around 38,000 homes. People wanting to be housed must apply to the council and put their names on the waiting list, known as the Housing Register.
- There are over 17,000 households on the register in bands 1-4 (band 1 being highest priority to move and band 4 the lowest).
- Unfortunately, the council faces a serious shortage of properties that it is able to offer compared to the number of people who are waiting for them.
- Waiting times depend on; your priority band, how many homes are available that would be suitable for you, the number of people on the waiting list with higher priority than you, how flexible you can be about the type of property and areas you will live in.
- There is a shortage of council and housing association homes in all areas.
- You are likely to be on the register for years even if you're in a priority group. You might not get a home if you are low priority.
- To be eligible to join the Register you need to meet a number of criteria including eligibility, local connection with Southwark, be within earnings and savings limits and not have a record of unacceptable behaviour or have housing-related debt.
- You also need to show that they are either in significant housing need or are in one of our reasonable preference categories. For further information including how to join, please visit <https://www.southwark.gov.uk/finding-a-new-home/looking-for-a-home?chapter=2&article>

Sheltered Housing

Once you have been accepted on the housing register, if eligible, you can bid for sheltered housing.

- This accommodation is for older people or younger disabled people to support them to live independently in their own home and manage their own affairs, for as long as possible.
- Sheltered properties are flats or bungalows linked to a control centre so that help can be summoned in an emergency at any time of day or night.
- Support staff also visit residents to check on their wellbeing, help them to maintain their independence, signpost them to other agencies and provide information and advice.
- Some residents may need a lot of support and may also have care provided through social services, voluntary agencies, family and friends. Other residents may only need help from time to time.
- In order to be eligible for Sheltered or older persons' accommodation you will need to be over 55 with a medical condition, or over 60 and can opt of older accommodation in their application or if already on the council's housing register.

Extra Care Housing

Extra Care Sheltered Housing is aimed at people who may be frail or more dependent on care services, but who can still manage in their own home with extra support that is provided by on site carers.

- To be considered for Extra Care you will need a Social Care assessment of needs and for your case to be presented to the Extra Care Housing Panel.
- The Extra Care Sheltered panel allocates accommodation on the basis of the assessed needs of applicants.
- The wait times for extra care sheltered accommodation are not able to be predicted as it depends on many factors including the number of properties available at the time.

Other services who may be able to support you:

- The Manna Society - [The Manna Society – Running a Day Centre for homeless people near London Bridge](#)

- StreetLink - [StreetLink - Connecting people sleeping rough to local services \(thestreetlink.org.uk\)](https://thestreetlink.org.uk)
- St Mungo's - [Clients | St Mungo's \(mungos.org\)](https://mungos.org)
- Southwark Day Centre - [Home - Southwark Day Centre for Asylum Seekers \(sdcas.org.uk\)](https://sdcas.org.uk)
- The Robes Project - [Robes](#)
- Southwark Refugee Communities Forum – St Giles Centre, 81 Camberwell Church Street, SE5 8RB – Wednesdays 10:30am to 3pm