Funding for the future of ageing well
VIVENSA FOUNDATION

SHAPE Exchange – Suitable Homes for an Ageing Population Evidence Exchange

Challenge Fund

SHAPE Exchange

In partnership with the Housing Learning and Improvement Network

Housing LIN
Connecting people, ideas and resources

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If you require this document in any alternative accessible formats, please contact us at admin@vivensafoundation.org.uk. We will do our very best to assist you.

1. INTRODUCTION

1.1 OVERVIEW

The UK population is ageing. By 2072, 27% of the UK population will be over 65. A 2024 report by Ipsos and the Housing Learning and Improvement Network (Housing LIN) shows that most older people want to stay in their own homes. Yet data from the Centre for Ageing Better shows that more than 1 in 5 people aged 50 and over live in homes that could harm their health, wellbeing and independence.

Poor housing contributes to falls, delayed hospital discharge, worsening long-term conditions, fuel poverty and health inequalities. People from under-served communities and those on lower incomes are disproportionately affected.

There is no shortage of evidence, recommendations or policy ambition in this area. Reports such as the Older People's Housing Taskforce (2024), the British Research Establishment's 'Cost of Poor Housing in England' (2012), the Marmot Review (2010 and 2020), the Chief Medical Officer's annual report (2023), and Amar Bari, Amar Jibon (2026) have identified what needs to change. The challenge is implementation and mainstreaming. Communities, practitioners and system leaders often know what needs to happen but lack the capacity, resources and transformation funding to make it happen at scale.

Together with the Housing LIN, the Vivensa Foundation has developed the SHAPE Exchange Programme and a 3-year Challenge Fund to address this implementation gap.

1.2 WHAT IS SHAPE?

Building on the HAPPI and TAPPI principles the SHAPE (Suitable Homes for an Ageing Population Evidence) Exchange is a UK-wide programme that will support local housing, health and social care systems to overcome problems that create a barrier to reform, turn local policies and strategies into an ambitious range of choices that can better meet the future accommodation needs and preferences of an ageing population, and help implement durable changes that deliver improved health and wellbeing outcomes for people in later life through housing.

The programme aims to:

- Create homes and communities where we can all live well in later life.
- Improve health and wellbeing so that people can thrive in later life.
- Reduce the inequalities and exclusion experienced as people reach older age.
- Enable people to live in their home for longer.

This will be generated by access to:

- Challenge funding to help build capacity to overcome a local system, challenge and build replicable and scalable solutions.
- Experts and leaders to connect, test and aid implementation of proven tools and approaches.

- Peer support and a community of practice to enable practical learning for wider adoption and knowledge exchange.
- Leadership expertise to uptake national, regional and/or local policy and practice, as well as inform/influence future strategies.

1.3 THE SHAPE CHALLENGE FUND OPPORTUNITY

The SHAPE Challenge Fund will invest at least £3 million across the four nations, funding several areas or 'SHAPE sites'. With awards of up to £1 million per site over three years, funds can be used for revenue and limited capital costs.

The funding aims to address pressing issues affecting older people, their homes, and the places and communities around them. The fund's aim is to enable local areas to explore solutions for sustained change scale and support the learning to shape policy, change practice and unlock further funding, including access to capital investment.

We are looking for ambitious place-based partnerships that can demonstrate how housing can be used as a lever to enable people to thrive in later life, in every postcode.

Successful proposals will:

- Have co-production at their core.
- Focus on practical implementation rather than further research.
- Improve health outcomes through housing and the wider community/neighbourhood.
- Build partnerships, taking a multi-disciplinary approach across housing, health, care and community sectors.
- Address health inequalities and ageism.
- Generate learning that can be shared nationally.
- Create effective leadership and ensure sustainable system change.
- Demonstrate 'soft' and 'hard' impact/value.

Our approach is built around four principles:

1. **Existing homes** – Most older people want and will continue to live in their existing homes. This means we need to focus on improving current sustainability of housing stock, including adaptation, repairs and maintenance, technology, retrofit, responding to demographic change, climate change and accessibility.

2. **A broader view of "adaptation"** – Adaptation should mean more than physical changes to a home. It should also include:

    - Age-friendly environments, social and community connections and wider public realm.

    - Modifications that support a wide range of health needs, including cognition, mental health, sensory needs, dementia, neurodiversity, etc.

- Culturally appropriate adaptations and support that better meet the needs of under-served ethnic minority communities.
- Intergenerational living models.
- Information, advice and support services and AI/technology.
- The voice of the older people in ensuring the adaptations meet their future needs for ageing well.

Housing should be seen as part of a wider ecosystem that includes health, care, and community support, not as a standalone issue.

3. **A place-based, community-led approach** – solutions should be shaped locally, agreed and tailored to local needs. They should be co-produced with residents, especially older people from the outset. The work should happen in real communities, not just in theory. The work should have a strong sense of localism and that the people involved in the co-production feel they are part of the process not 'done to'.

4. **A focus on system change, not pilots.** The programme is not intended to support isolated small-scale projects. We will give priority to solutions that are truly collaborative in a cross-system manner (i.e. health, housing, care and community services all contributing equitably and meaningfully), that can scale, meet local/regional strategic objectives, be accelerated, be sustained, be transferred to other places, and demonstrate that they can create system-wide impact.

1.4 WHAT CAN THE FUNDING BE USED FOR?

The Challenge Fund will support practical, place-based initiatives that improve outcomes for older people through better housing, stronger communities, and closer integration between housing, health and adult social care.

We welcome proposals that combine multiple approaches and create sustainable system change. Based on the input from the SHAPE Advisory Group, examples may include, but are not limited to:

Improving existing homes

- Developing faster and more equitable home adaptation pathways such as improving access to Disabled Facilities Grants or equivalent schemes.
- Coordinating repairs, maintenance, retrofit and accessibility improvements, such as the provision of technology and/or equipment.

- Enabling adaptations that support people beyond physical health needs, including cognition, mental health, sensory needs, dementia and neurodiversity, and that respond appropriately to people's cultural needs and preferences. Supporting people to remain active and safe in their homes for longer.
- Tackling fuel poverty, poor housing conditions and climate-related risks.

Housing, health and care

- Creating age-friendly, healthy homes and communities that support independence, wellbeing and prevention, and reduce avoidable pressures on health and care services.
- Creating joint housing-health-care pathways that keep people well and/or prevent hospital admissions.
- Helping people get home from hospital more quickly by making adaptions or adjustments at home.
- Enabling people to self-manage their health and daily activities - reducing need for additional support.
- Embedding housing expertise within health and care services and vice versa.
- Developing a multi-disciplinary team approach to identifying and supporting people at risk.
- Creating systems that share data and allow for information or referrals to be made easily.

Community-led and preventative approaches

- Establishing community housing information or advice hubs that provide advice, advocacy and support.
- Developing neighbourhood-based approaches that help people connect with others, reduce loneliness or social isolation.
- Supporting age-friendly and dementia-friendly communities with local housing growth/plans.
- Creating culturally appropriate services that improve access for under-served communities.
- Testing intergenerational models that strengthen community connections.
- Supporting interventions by grassroots organisations co-designed to build on people's assets and/or strengthen community connections.
- Establishing climate resilience by future-proofing for extreme weather events.

Expanding housing choices

- Applying evidence-based innovation informed by the HAPPI principles.
- Developing local strategies that increase housing options and associated support structures for older people.
- Supporting moves to more suitable housing where this aligns with residents' wishes.
- Demonstrating innovative housing models, both new build and adapting/retrofitting existing homes or properties, that enable people to stay well and active.
- Improving pathways into housing that supports people throughout the life course.
- Encouraging mainstream housing providers to adopt inclusive and age-friendly co-designed principles.

Technology and innovation

- Using proactive digital tools to improve access to information, advice and support.
- Aligning with prevention, testing technology-enabled approaches that help people stay well and age well at home.
- Ensuring all housing is tech enabled and ‘care ready’.
- Applying evidence-based innovation informed by TAPPI principles.
- Exploring how data and digital solutions can improve service coordination and outcomes for people.

Learning, evaluation and scaling

- Developing robust evaluation approaches and cost-benefit analysis/impact.
- Creating implementation models that can be replicated or used as evidence to accelerate similar models elsewhere.
- Producing practical learning, tools and guidance for other systems.
- Building the evidence required to attract future investment, uptake and influence policy.
- Creative use of personal impact evidence and /or storytelling to capture, measure, quantify, and show the value of the project.

2. THE SHAPE MODEL

2.1 LOCAL SHAPE LEADERSHIP SETS

Each funded area or 'SHAPE site' will be required to establish a SHAPE Leadership Set, with support from the Housing LIN, that will act as the SHAPE site's local steering group. Each Leadership Set should consist of approximately 15 participants and bring together people with lived experience, senior leaders from housing, health, care, local government, the voluntary and community sectors, including hyperlocal, grassroots, citizen or community-led organisations and groups especially those with a focus on:

- Tackling ageism and overcoming persistent barriers to adoption.
- Guiding delivery, championing system change, and ensuring learning is embedded locally and shared nationally.
- Acting as leaders in your field and influencing practice across your region and beyond.
- Co-producing directly with older people so your work reflects their needs and expectations.
- Improving how organisations work together and share good practice across community, housing, health, and social care.
- Identifying new opportunities and co-creating better ways of working in response to local challenges.
- Building stewardship and strong sustainable networks that add value to strategic and community partnerships across sectors.
- Supporting succession planning to ensure a long-term commitment to change, including influencing relevant locality plans and strategies.

The Leadership Set is provided free for to up to 15 people in each funded site. In addition, successful applicants will be invited to join the Vivensa Academy where they can access wider support and knowledge exchange.

2.2 LEARNING AND EVALUATION

All funded sites will be expected to:

- Include an evaluation partner e.g. a university or recognised research institute/agency, as part of their applicant team.
- Participate in programme-wide learning activities and the Housing LIN community of practice across the four nations.
- Share implementation and peer-to-peer learning with other SHAPE sites and programme partners.

- Contribute evidence and resources that support and accelerate wider adoption.
- Report regularly to the Housing LIN and Vivensa Foundation, participate in external events and support the programme communication's plan.

3. ELIGIBILITY CRITERIA

3.1 ESSENTIAL REQUIREMENTS

Applicants must:

- Be led by one statutory body or, registered charity or, registered social landlord/provider or, community interest company, or other registered not-for-profit organisation, which is locally rooted or have a local presence and impact independent of public sector deliver contracts and recognised in Scotland, Wales, Northern Ireland or England.
- Demonstrate how they will work in partnership to achieve outcomes, involving people with lived experience, local citizens, organisations from housing, health, care and/or the voluntary and community sector, including hyperlocal, grassroots, citizen led organisations and groups.
- Evidence a commitment to improving outcomes with and for older people through housing and/or housing related support, interventions or connections.
- Evidence a commitment to reducing inequalities and addressing the needs of under-served communities.
- Evidence a strong commitment to and practical impactful experience of co-design and/or co-production via existing relationships with older people and communities.
- Show evidence of partnership working across organisational and/or community boundaries.
- Commit to participating in the SHAPE Leadership Sets and learning activities for the duration of the programme (provided free for to up to 15 people in each funded site).
- Be able to receive and manage grant funding and meet reporting requirements.
- Demonstrate formal support from/sign up by senior leaders within the lead organisation and key partner organisations specifically, grassroots organisations and/or older people.
- Have established methods for collecting stories, outcomes, impact and cost benefit data, with a named evaluation partner and evolution plan.

3.2 DESIRABLE REQUIREMENTS

We would particularly welcome applications that:

- Can attract additional investment alongside SHAPE funding such as additional revenue, social finance or capital investment to strengthen the ambition for your application.

- Have experience of using the HAPPI design principles, or similar approaches, in the delivery of new-build housing suited to older people.
- Have experience of using the TAPPI principles, or similar approaches, in developing tech-based support services in housing and communities.
- Operate within mayoral, regional or place-based partnerships with opportunities for wider influence across the four nations.
- Propose creative ideas for place-based, citizen led partnership and/or coproduction working.
- Where appropriate, match fund or identify other revenue/capital investment that supports their application.

3.3 ELIGIBLE BUDGET AND COSTS

Applicants can apply for up to £1 million for a maximum of three years, and we welcome proposals which include part-funding or in-kind revenue contributions from the involved organisations and/or other sources. Given the nature of the programme, we expect that the full value of most proposals (taking into account any part-funding or in-kind contributions) will be at least £500k. The fund is primarily intended to support revenue activity. Limited capital costs may be eligible where they directly enable the delivery of the proposed project or activity and no other source of funding is available.

Applicants are **strongly advised** to request the salary of a dedicated member of staff to lead on the work.

Guidance on costs for evaluation partners (research organisations):

- In general, we will cover suitably justified Directly Incurred and Directly Allocated costs for universities and other research organisations.
- However, we will **not** meet Indirect or Estates costs, overheads for universities and other research organisations**.** Please note that this is because host universities receive a contribution to the indirect costs of charity-funded research via the Charity Research Support Fund.

Guidance on costs for community organisations:

- **We expect** community organisation(s) (either as the lead applicant or co-applicants) to be compensated fully for their contribution to the work at their full economic cost. Some useful advice on full economic cost recovery for community organisations is provided in the "Support and resources for community-facing organisations" drop-down on the "How we support you" page on our website.
- The Vivensa Foundation is a Living Wage Funder and we require all posts which are wholly or partially funded by us to be paid at least the real Living Wage, unless there are particular reasons for this not to happen. More information can be found on the Living Wage website. Please note that organisations do not need to be accredited Living Wage Employers to apply to us, but we do encourage organisations to consider whether this is a possibility for them.

SUPPORTING INVOLVEMENT AND ENGAGEMENT WITH THE PROGRAMME

Co-production is an approach to working together in equal partnership for equal benefit. Which means removing barriers to participation, addressing power imbalances, and valuing a diversity of knowledge and experience. Payment is one approach through which we can support access, and recognise everyone's time and expertise. The following guidance may be useful in supporting the development of your application:

- Coproduction Collectives https://www.coproductioncollective.co.uk/policies/payment-policy.
- payment guidance for researchers and professionals involving people in research.
- UK Standards for Public Involvement in Research.

We would expect these costs to relate to the answers provided in the relevant sections of the application form.

EQUITY, DIVERSITY AND INCLUSION (EDI) COSTS

- Examples include relevant training, translation costs etc. Again, we would expect these costs to relate to the answers provided in the relevant sections of the application form.

4. CRITICAL SUCCESS FACTORS

Over the past six months, we have spoken to key stakeholders from a range of organisations to help shape our critical success factors (CSFs). Each site will need to show that it has the right conditions in place to support strong stewardship, lasting impact, and sector/community learning. **However, we do not expect that each site will be able to address all CSF's**. We also welcome applications from areas that are committed to working towards some of these factors during the programme. We recognise that funding can sometimes bring people together in new ways. We hope this fund will act as a catalyst for whole-system change.

Widening housing options that support us to live well

- Scaling up the number of existing homes that are better adapted to the needs of older people.
- Planning for and delivery of a mix of new build age friendly homes cross all tenures.
- Creating intergenerational housing and supporting communities to grow.

Reducing inequalities

- Explicit focus on improving homes for under-served communities using the Core 20 plus 5 approach.
- Co-design/co-production approach embedded throughout ensuring that ageism is addressed and a positive and inclusive approach is promoted.

- Creation of multi format communication on home adaptations (Amar Bari, Amar Jibon recommendation).
- Community-led physical housing hubs as primary mechanisms for housing support, advice, information and advocacy.
- Review of efficacy and equity of the Disability Fund Grant/Scheme of Assistance, including a commitment to annual monitoring and reporting of funded home adaptations by protected characteristics (Amar Bari, Amar Jibon recommendation).
- Affordable housing choices.

Collective leadership response/building stewardship

- Joint approach between health/care/housing, with named Occupational Therapist lead and Public Health Director. To include public/private organisations and the VSCFE sector.
- Commitment from CEO and CFOs at Local Authority/Integrated Care Board/Health Board/Homes England/GLA or equivalent NI Ireland/Scotland/Wales.
- Commitment to leadership development, including to take part in the Leadership Programme and identify future leaders from under-served communities and health/housing/care organisations (Provided free for to up to 15 people in each funded site.).

Adoption of Best Practice

- Commitment to review and adopt TAPPI and HAPPI principles.
- Commitment to adopt/develop good practice such as a The Good Landlord Charter .
- Commitment to the RCOT reports Building Health into Homes and Adaptations Without Delay.
- Commitment to forthcoming government housing strategy in England and relevant strategies in Scotland, Wales and Northern Ireland.

Learning and scale

- Identified evaluation and learning partner to inform delivery in 'real time.' This needs to focus on 'real world' implementation with a focus on enabling continuous quality improvement. Developing a cost benefit analysis model to demonstrate that the work is, for example, delivering a reduction in hospital visits, supporting people returning home from hospital, working with people and what matters to them, enabling people to live their life, their way, giving people a chance to continue to contribute and have purpose, helping people to avoid falling over, enabling people to stay connected and part of their community.
- Commitment and plan for sustainability and scale, to other areas, the creation of 'how to' guides for others including business cases/cost benefit analysis.

- Co-investment via the Better Care Fund (BCF), Regional Integration Fund (RIF), Health and Social Care Integration Fund, or Disability Facility Grant (DFG) / Scheme of Assistance and/or a plan to identify and secure additional investment to improve homes for older people and reduce inequity.
- Supporting learning and scalability for everyone involved in the project.
- Drawing on learning from TAPPI to aid digital transformation and use of AI.

Strategic Planning

- Audit (or plans to undertake one) using age friendly assessment tool and specifically consider how dementia-friendly the area is.
- Understand the needs and preferences of people from under-served communities to inform this programme and future developments. Ensure formal and consistent assessment of needs.
- Commitment to play Hopetown with key stakeholders within Year 1 Serious Play for Serious Change.
- Commitment to undertake joint housing/health/care strategic assessments by ethnicity and ageing (50+) and to outline these in plans such as Joint Strategic Needs Assessment/Health and Wellbeing Strategies, Housing Needs Assessment.

5. APPLICATION PROCESS AND TIMELINE

The application process includes submitting an application form and review by an assessment panel.

Applications must be made through the Vivensa Foundation's grants portal. Once we receive an application, we will check that it is eligible before the assessment panel reviews and shortlists it. The panel will include representatives from the Vivensa Foundation, Housing LIN, and a subgroup of the SHAPE Exchange Advisory Group.

We will then visit shortlisted applicants to learn more about their organisations, their local area, and how they would use the funding to create transformational change that supports healthy ageing.

Date	Process
27 October 2026	Webinar to launch the call
12 March 2027	Deadline for applications
Early April 2027	Conclude assessment and shortlisting
April-May 2027	Visits to shortlisted locations
10 June 2027	Recommendations made to Vivensa Foundation Trustees

We aim to advise you of the outcome within two weeks of the Vivensa Foundation Board meeting.

6. ONLINE APPLICATION AND ASSESSMENT

6.1 OVERVIEW

Applications must be made through the Vivensa Foundation's grants portal.

Online applications will open on Tuesday, 27th October 2026 and close at **5pm on Friday, 12 March 2027**.

The funding call will be launched at a Housing LIN HAPPI Hour event. A recording of the event can be viewed here.

BEFORE STARTING AN APPLICATION

Before you start, please read these guidelines in full and check that you meet the eligibility criteria.

- Policy on use of generative and agentic AI in the grant application process, all applicants must disclose any use of AI tools, the tool(s) you have used and for what purpose. Where possible, you must name the specific model(s) and software used and specify how the content was generated (including the prompts used). **This information is used for monitoring purposes and will not be used in the assessment process**. We acknowledge that AI tools offer significant potential to enhance research productivity and innovation. However, these should be used responsibly and in accordance with relevant legal and ethical standards, including data privacy, where these exist or as they develop. **Therefore, you should never input sensitive or personal data of others (i.e. third parties) into AI tools without consent**. In addition, the use of AI tools requires careful consideration to maintain academic integrity, research quality and ethical standards. **You, as an applicant, remain responsible for all research ideas and content contained within your proposal**. You are responsible for verifying the accuracy of any AI-generated content, maintaining academic integrity, respecting intellectual property rights, and considering potential bias.

THE APPLICATION FORM

You must submit the application form through the Vivensa Foundation's online Grants Management Portal. You can download a PDF template of the application form from the Vivensa Foundation's website. This PDF is for planning only.

You can find detailed guidance on using the Grants Management Portal in the Foundation's "how to" guide.

6.2 ASSESSMENT PROCESS AND CRITERIA

Once you submit your application, the Foundation will review it to confirm that it meets the following criteria:

- Eligibility for the award.
- Satisfactory completion of the application form, including any required uploaded documents.

- That the proposal evidences relevant national and/or regional policy.
- That the proposal references **relevant** Critical Success Factors.

Applications will then be further reviewed according to the following criteria:

- That the range of partnership organisations and citizens is appropriate for the proposed work.
- That a suitable need or model of change has been identified with a credible plan to address it.
- That the proposed activity addresses the programme criteria.
- That the proposed activity has addressed and evidence the **relevant** critical success factors.
- That there is a clear and compelling consideration of:
    - Equity, Diversity and Inclusion (EDI).
    - Co-production through citizen and/or community partnership.
- That there is a suitable evaluation and learning partner identified with a clear plan articulated.
- The details of the costs provided – the budget requested is necessary and sufficient for the activities proposed (e.g. have the requested costs been adequately justified? etc.).

FEEDBACK ON APPLICATIONS

We will provide individual feedback to shortlisted applicants once funding decisions have been made.

Unsuccessful applicants will be invited to join the Housing LIN's wider community of practice so they can stay updated on the programme's learning and outcomes, and access other tools and resources.

6.3 CHECKLIST

Make sure you have completed all the relevant tasks on this list before submitting your application:

- ☐ Have you read these guidelines fully and checked the eligibility criteria for the award?
- ☐ Have you provided detailed and relevant answers to all mandatory questions in the application form?
- ☐ Have you included the costs of your evaluation partner and attached your evaluation plan?
- ☐ Have you uploaded any supporting documents alongside the application form?

7. SUPPORT AND FURTHER INFORMATION

7.1 SUPPORT FROM THE FOUNDATION

- For guidance on navigating and using the Grants Management Portal, please see the Vivensa Foundation's "how to" guide.
- You can download the PDF template application form from the Foundation's website if you wish to review it before making your application via the portal.
- You can download a template Funding Agreement from our website if you wish to review it before making your application via the portal.
- Visit the Housing LIN website for more information on the SHAPE Exchange Programme.
- Watch the HAPPI Hour video launching the SHAPE programme.
- Read the Vivensa Foundation's 2025-30 Strategic Framework, which highlights our funding principles and research priorities.

7.2 EXTERNAL GUIDANCE

For information about patient, carer, and public involvement and engagement (PPIE) in research, please see:

- Coproduction Collectives https://www.coproductioncollective.co.uk/policies/payment-policy
- National Institute for Health and Care Research website for PPIE resources.
- UK Standards for Public Involvement.

7.3 CONTACT INFORMATION

If you have any questions about the programme, please contact Sarah Allport, Head of Communities and Governance, at sarah.allport@vivensafoundation.org.uk.

If you have any questions about the application process or awards, or if you need this document in an alternative accessible format, please contact admin@vivensafoundation.org.uk. We will do our best to help you.