Service Coordinator in Elderly Multifamily Housing Program

Getting in the Know
A Look At Our Residents

Residents of HUD-assisted rental housing, especially older adults, tend to be extremely low-income, with higher-than-average healthcare utilization patterns.

Over 12,000 properties nationwide are restricted to elderly households.

- 39% - between 62-74 years of age
- 27% - between the ages of 75-84
- 13% - between the ages of 85-99
- 1% are 100 years of age or older
- 67% of our residents are female
- SSI is the primary source of income for over 72%
Supportive Housing

Expectations

Recognize the importance of housing as a platform for...

➢ financial security
➢ physical security
➢ social connections, and
➢ delivery of long-term support and services, especially for vulnerable populations such as the elderly.
Welcome to HUD Exchange

Disaster Planning, Response, and Recovery Toolkit for Housing Counselors Now Available

Read More
Welcome to HUD Exchange
NEW self-paced online learning tool from HUD for the Service Coordinators in Multifamily Housing Program

Reviews material in HUD’s Service Coordinators in Multifamily Housing Program Resource Guide

Complete the training and receive credit towards ongoing training requirements
Guidance on Program Standards for the Service Coordinators in Multifamily Housing Program

Doing the Job of Service Coordination

- Hiring and Training Service Coordinators
- Confidentiality and Conflicts of Interest

Files and Records Management

Service Coordinator Funding, Reporting, and Program Monitoring

Quality Assurance in Service Coordination
Video Interviews with Practitioners Highlight Best Practices for Service Coordinators
HUD’s Service Coordinators in Multifamily Housing Program Online Learning Tool

- Designed for service coordinators who are new to the program and experienced practitioners who need a refresher.
- Test your knowledge with a short quiz at the end of each section.
- Training is not required, but highly recommended by HUD and can be accessed at any time that fits your schedule.
Taking a Look Inside the Flipbook

HUD’s Service Coordinators in Multifamily Housing Program Resource Guide


July 2016

U.S. Department of Housing and Urban Development
Office of Multifamily Housing
Service Coordinator

Expectations

Foster a housing plus supportive service environment that will allow elderly persons to live independently and age in place.

➢ Shift away from the “refer and link” approach
➢ Seek to establish strong local partnerships to help residents to identify and address their preventative health and social service needs;
➢ Create and sustain partnerships with hospitals, service providers and other community partners.
## Role of Service Coordinators

<table>
<thead>
<tr>
<th>Service coordinators ARE</th>
<th>Service coordinators ARE NOT</th>
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<tbody>
<tr>
<td><strong>Advocates</strong> on behalf of their residents</td>
<td>Direct service providers</td>
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<td><strong>Resources</strong> for residents on available community-based services, and can answer any questions</td>
<td>Recreation or activity directors</td>
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<td><strong>Facilitators</strong> of wellness and other educational programs for residents</td>
<td>Duplicators of existing community services</td>
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<td><strong>Motivators</strong> who empower residents to be as independent as possible</td>
<td>Distributors of medical aids, medications, or medical advice</td>
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<td><strong>Monitors</strong> who follow up with services provided to residents</td>
<td>Handlers of residents' funds</td>
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<td><strong>Champions</strong> who encourage residents to adhere to a healthy lifestyle</td>
<td>Managers or leasing agents</td>
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<td><strong>Educators</strong> who provide trainings and assistance to residents and other property staff</td>
<td>Drivers of residents</td>
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<td><strong>Advisors</strong> who can assist residents with building support networks and consult with tenant organizations and resident management</td>
<td>Organizers or leaders of resident associations or councils</td>
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<tr>
<td><strong>Referral agents</strong> who connect residents to service providers who can meet their needs</td>
<td>Powers of Attorney for residents or individuals who sign checks for residents</td>
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<tr>
<td><strong>Community partners</strong> to assist residents with accessing community-based services</td>
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Proactive Engagement

1. **Connect with residents within two weeks of hire or move-in**
   - Property managers should introduce new residents to the service coordinator during the initial move-in meeting
   - Send a formal letter then do a face-to-face follow-up with resident
   - The location of in-person meetings should also reflect a resident’s preferences

2. **Establish on-going relationships**
   - Frequent interactions with residents = trusting relationship between service coordinators and residents
   - The frequency of engagement with residents may change based on their needs

3. **Goal should be to reach out to at least 80% of residents on a monthly basis**
   - Organize a community-wide engagement
Conduct Assessments

- To provide assistance and make referrals for appropriate supports or services, service coordinators will need to learn about each resident’s wants, needs, interests, and abilities through an assessment.

- Serve to guide for details on conducting resident assessments.

Use Assessments to develop resident supportive services plans
- The plan is a roadmap for making referrals, applying for benefits and assisting the resident in obtaining services and supports.
- Plan should be collaborative.
Conduct Assessments

Service coordinators are not clinicians and are prohibited from attempting to make any medical, physical, behavioral, or psychological diagnoses or clinical conclusions as a result of the information gained from assessments or screenings.
Property-Wide Supportive Services Plan

• Shift away from limiting our thinking to brick and mortar

• Response to GAO audit Recommendation
  • [HUD Should do More to Oversee Efforts to Link Residents to Services](#)

• Owners are required to prepare a supportive services plan for each property that describes the supportive services proposed to be provided to the residents. **Update Annually**

• The plan must include a description of the public or private funds that are expected to fund the proposed services and the manner in which the services will be provided to residents

• The plan must also make clear that residents will not be required to accept any supportive services as a condition of occupancy or admission.
Property-Wide Supportive Services Plan

The supportive services plan of a development with service coordination should consist of:

1. An overview of the services to be provided to residents in the development, including service coordination as well as any other services the property provides
2. A description of how any services to be provided to residents will be funded
3. The property-wide profile
4. A statement affirming that residents will not be required to accept any supportive services as a condition of occupancy or admission
Property-Wide Profile

Property-wide profiles should reflect summaries of the following and be updated annually:

- The property’s demographics (e.g., number of elderly residents, number of persons with disabilities)
- The information available to the service coordinator on resident health
- Property-wide ADL and IADL needs
- Wellness and preventative care programs
- Available community-based services and resources
- Key partnerships in place with community-based organizations, AAA/ADRC, local hospitals, clinics and universities to ensure that residents have continued and sustainable access to needed services
- Community-wide gaps in services within the property
Partnerships with Community-Based Service Providers

Creating and maintaining a robust resource network of local supportive service providers, hospitals, universities is a MUST

A core function is to develop and sustain partnerships with service providers and other community organizations.

- Developing and sustaining partnerships with the Area Agency on Aging, the Aging & Disability Resource Connection, community-based supportive service providers and other community stakeholders
- Reach out to partners regularly
- Assess quality of services provided and potential to benefit residents
- Develop formal agreements

Maintaining an up-to-date resource directory
### Training

#### Statutorily Required Training Areas for New Hires
- The Aging Process
- Federal and Applicable State Programs and Eligibility
- Elder Services
- Disability Services
- Legal Liability Relating to Service Coordination
- Drug and Alcohol Use/Abuse by Elders
- Mental Health Issues

#### Required Ongoing Training Areas
- SCMF Program Online Learning Tool
- The Role of the Service Coordinator
- Ethics in Service Coordination
- Networking in the Community and Identifying Resources
- Outcomes and Program Evaluation
- Mental Health and Aging
- Healthy Aging
- Medications and Older Adults
- Communication Strategies in Working with Older Adults
- Fair Housing and Reasonable Accommodations
- Professional Boundaries

#### Minimum Required Training Hours:
- New hires: 36 hours of classroom/seminar time before or within 12 months of being hired.
- Ongoing: 12 hours of continuing education each year.

#### Additional Recommended Training Areas
- Identifying and Assessing Capabilities and Needs
- Monitoring and Evaluating Services
- Effective Advocacy
- Crisis Prevention and Intervention
- Working with Other Members of the Property Management Team
- Cultural Competency
- Chronic Diseases of the Elderly
- Dealing with Cognitive Impairments
- Sensuality/Sexuality and Older Adults
- Mediation and Conflict Resolution
- End of Life Issues
- Isolation and Older Adults
- Effective Communication
- Supportive Service Needs of Persons with Disabilities
- Current Trends in Affordable Housing and Healthy Aging
- Disease Prevention
- Hoarding
- Bullying
- Creating and Sustaining Successful Partnership Models
Interfacing with Other Property Staff

• Critical that the service coordinator be an active and full member of the property’s management team

• Property manager, service coordinator, maintenance staff, and other relevant property staff should meet on a regular basis to jointly consider issues that arise that may affect residents or discuss any changes in the resident selection plan or facility rules

• Service coordinator is obligated to direct residents to management when management issues such as damage to property, need for a repair, or failure to pay rent arise.

SC is prohibited from engaging in any duties directly related to property management functions
The more service coordinators and other members of the property’s management team understand each other’s roles, functions, and responsibilities, the smoother the operation of the project.

### Recommended Training Areas for Other Property Staff

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<tr>
<th>Understanding the aging process</th>
<th>Ethical behaviors</th>
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<td>Aging and social isolation</td>
<td>Professional boundaries when working with residents</td>
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<tr>
<td>Mental health issues</td>
<td>Recognizing signs of abuse, neglect, and exploitation</td>
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<td>Recognizing the signs of hoarding</td>
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<td>Bullying and older adults</td>
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Confidentiality and Conflicts of Interest

Service coordinators must comply with confidentiality requirements under the Privacy Act of 1974.

- The Act provides exceptions for disclosure “to a person under compelling circumstances affecting someone’s health or safety.”
  - In an emergency where a resident is unable to respond and medical information cannot be located, the service coordinator may share information about relevant medical conditions with emergency responders, if doing so would improve the resident’s chance of survival.

- Referrals for medical services may require specific medical information. This type of information sharing should only be done via a signed Consent to Release Information
Confidentiality and Conflicts of Interest

- **Consent.** Service coordinators must keep all resident information confidential unless the resident gives them explicit permission to share the information with others.

- **Current.** Resident consents for the release of information should be time-limited and be re-signed by the resident on a regular basis, no less than once a year.

*Under certain exceptions*, service coordinators must share resident information with property management staff if withholding the information could lead to negative consequences including self-harm or harming others, activities that break the law, or violations of the lease agreement or community rules.
Quality Assurance

Expectations

• Ensure Program Fidelity
• Support the Service Coordinator in accordance with the resource guide
• Understand 2 CFR Part 200 and provide technical guidance to Owners
• Strengthen the Role of the Owner in the Program
• Help to foster a culture around partnerships (internal and external to property)
• Help to foster a culture around continuous learning
• Understand emerging issues around health and housing
• Serve as a monitoring arm
Visit HUD Exchange to Access the Online Learning Tool and Resource Guide

Visit [https://www.hudexchange.info](https://www.hudexchange.info) and click on the magnifying glass to search for “SCMF”

Direct link: [https://www.hudexchange.info/trainings/courses/service-coordinators-in-multifamily-housing-online-learning-tool](https://www.hudexchange.info/trainings/courses/service-coordinators-in-multifamily-housing-online-learning-tool)
Visit HUD Exchange to Access the Financial Management Toolkit
Disciplined

Serves as a supplementary reference to assist grantees and their sub-recipients in fulfilling the fiduciary and grants management responsibilities detailed in contract and grant award documents.

Objective is to safeguard grant funds and ensure that all funds are used for the purposes for which they were awarded.
Responsibly manage your program in accordance with:

- Annual Renewal Guidance
- Governing Notice of Funding Availability (NOFA)
- Grant Agreement
- 2 CFR Part 200
- Applicable HUD Handbook(s)
- Other governing directives
Important Program Links

HUD Service Coordinator Webpage
HUDexchange.info
Multifamily Housing Service Coordinator Budget Tool (see “What’s New” on homepage)
HUD's Client Information Policy Systems (HUDCLIPS)
HUD Notice 2012-14, Use of “New Regulation” Section 8 Housing Assistance Payments (HAP) Contracts Residual Receipts to Offset Project-Based Section 8 Housing Assistance Payments
Grant Management Links

2 CFR 200
Council on Financial Assistance Reform
Online DUNS Request Portal
The System for Ward Management (SAM)
Helpful SAM Videos
USASpending
HUD’s Grant Management Webpage
GrantSolutions