HUD’S NEW EXPECTATION FOR A SERVICE COORDINATOR PROGRAM
WHERE ARE THE CHANGES COMING FROM?

- Service Coordinator Requirements
  - Section 202 Program Requirements
  - Housing Act of 1959
- Government Accountability Office
  - 2016 study which found that HUD had not ensured supportive service structures on 202 properties.
- HUD did not know how many service coordinators there were.
- Additionally, HUD had not provided a structure to ensure owners were spending money correctly to obtain desired outcomes.
HUD DIDN’T KNOW HOW MANY PROPERTIES WERE BEING SERVED

- 2016 Estimates of Service Coordinators
  - 7,229 active 202 housing properties
  - 2,730 or 38% have a HUD funded service coordinator
  - 868 or 12% properties that HUD didn’t know about
  - 4,499 or 62% without a service coordinator
Welcome to the Service Coordinators in Multifamily Housing (SCMF) Program Online Learning Tool

This tool provides service coordinators, owners of HUD-assisted multifamily housing, property managers, and other staff with guidance on how to run an effective service coordination program that incorporates best practices and adheres to program standards and requirements.

HTTPS://WWW.HUDEXCHANGE.INFO/TRAININGS/COURSES/SERVICE-COORDINATORS-IN-MULTIFAMILY-HOUSING-ONLINE-LEARNING-TOOL/
FOR OWNERS, AGENTS, MANAGERS AND SERVICE COORDINATORS
HUD’S SERVICE COORDINATORS IN MULTIFAMILY HOUSING RESOURCE GUIDE
SO WHAT DOES HUD WANT US TO DO?

- HUD’s Service Coordinators in Multifamily Housing program provides funding for service coordinators to assist elderly individuals and persons with disabilities in obtaining the supportive services they need to continue to live as independently as possible in their homes.
WHAT WASHINGTON SEES (EXAMPLE)

- Cost of housing an elderly individual in HUD subsidized housing (Wesley)
  - Subsidy = $420 (Rent minus resident share)
  - Service Coordinator = $54
  - Supportive services (HCBS, SNAP, Commodities, etc.) = $1055
  - Total Government support costs = $1529
- Cost of Nursing Home (Tennessee) = $6388#
- Difference = $4859 at about 900,000 elderly subsidized units nationwide
- Annual government savings for 30% of the residents would be $1,311,930,000 per year
- Add the value of improved health outcomes from improved housing for all residents = $963 and adds an additional $260,010,000*

#Genworth Cost of Care Calculator for Tennessee Median semi-private room
*Institute for Research on Poverty Discussion Paper no. 1380-10
### Service Coordinator Activities

<table>
<thead>
<tr>
<th>Service Coordinators ARE</th>
<th>Service Coordinators ARE NOT</th>
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<tbody>
<tr>
<td>Advocates on behalf of their residents</td>
<td>Direct service providers</td>
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<td>Resources for residents on available community-based services,</td>
<td>Recreation or activity directors</td>
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<td>and can answer any questions</td>
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<tr>
<td>Facilitators of wellness and other educational programs for</td>
<td>Duplicators of existing community services</td>
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<tr>
<td>residents</td>
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<td>Motivators who empower residents to be as independent as</td>
<td>Distributors of medical aids, medications, or</td>
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<td>possible</td>
<td>medical advice</td>
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<td>Monitors who follow up with services provided to</td>
<td>Handlers of residents' funds</td>
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<tr>
<td>residents</td>
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<tr>
<td>Champions who encourage residents to adhere to a healthy</td>
<td>Managers or leasing agents</td>
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<td>lifestyle</td>
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<td>Educators who provide trainings and assistance to residents</td>
<td>Drivers of residents</td>
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<td>and other property staff</td>
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<tr>
<td>Advisors who can assist residents with building support</td>
<td>Organizers or leaders of resident associations or councils</td>
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<td>networks and consult with tenant organizations and resident</td>
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<td>management</td>
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<td>Referral agents who connect residents to service providers</td>
<td>Powers of Attorney for residents or</td>
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<tr>
<td>who can meet their needs</td>
<td>individuals who sign checks for residents</td>
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<td>Community partners to assist residents with accessing</td>
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<tr>
<td>community-based services</td>
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**SERVICE COORDINATOR ACTIVITIES**
THE NEW SERVICE COORDINATOR MODEL
• Conducting comprehensive, non-clinical assessments of residents for wellness and social needs;
• Helping residents to identify, access, and coordinate services (such as personal care services), including monitoring of services provided and follow-up communication with service providers;
• Monitoring the receipt and follow through of services, including encouraging and motivating residents to engage with providers and participate in their own care/services management;
• Proactively developing and arranging educational/preventative health programs and services for residents;
• Developing and sustaining partnerships with the Area Agency on Aging, the Aging & Disability Resource Connection, community-based supportive service providers and other community stakeholders; and
• Maintaining an up-to-date resource directory with all local service providers.

Some well-established service coordinator programs also serve additional functions, such as being part of an interdisciplinary team supporting residents’ ability to age in place that may also include health professionals.
- New Resident Engagement
- Establishing ongoing relationships with residents
- Refusal of services

PROACTIVE ENGAGEMENT AND OUTREACH
CONDUCTING RESIDENT ASSESSMENTS

- Initial and annually
- Assessment Tool
  - Demographic information of the resident
  - Financial resources
  - Sources of formal and informal supports
  - Interests and hobbies
  - Existing social supports and networks
  - Health insurance status
- Resident reported physical, cognitive, and mental health conditions
  - Refers to the basic set of common tasks of everyday life I.E. eating, bathing, dressing, all of which are required for personal self care.

- Activities of Daily Living and Instrumental Activities of Daily Living
  - Refers to activities related to independent living I.E. planning and preparing meals, housework, shipping, managing finances
Referrals for formal clinical assessments should be made where the service coordinator feels there may be an issue requiring professional follow-up.
- HUD requires development of a property wide profile
  - Demographics
  - Resident health
  - Property-wide ADL and IADL needs
  - Wellness and preventative care programs
  - Available community-based services and resources
  - Key partnerships
  - Community-wide gaps in services for the residents within the property

PROPERTY WIDE PROFILE
Profile assessments of residents at the property will be completed and updated annually. Property-wide profiles may be formed from the Resident Demographics, Miscellaneous Reports: Successful Aging Report, ADL/IADL Report, QA’s Programming Spreadsheet and AASC Online Community Resources reports from the Pangea software and placed in the service coordinator binder. Property-wide profiles should reflect summaries of the following:

- The property’s demographics (number of elderly, disabled, etc.)
- 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
- Establish Partnerships with Community-Based Service Providers
  - Maintain a Resource Directory
- Making Supportive Services Referrals
- Educating and Advocating for Residents
- Interfacing with Other Property Staff

DUTIES OF A SERVICE COORDINATOR
Qualifications:
- Bachelor’s Degree (or appropriate experience), knowledge of and training in elderly and disability services, knowledge of referral processes, demonstrated working knowledge of local services and two or three years of social service delivery experience.
- Training consists of 36 hours of classroom/seminar time before or within 12 months of being hired and 12 hours of continuing education each year.
- Training must be documented through certificates including the length of the full course in hours, who administered it, dates, and cost of training.
- Internal and external training is appropriate.

HIRING AND TRAINING SERVICE COORDINATORS
All resident information is confidential unless the resident has given written permission to share which must include:

- With whom the information is to be shared
- The specific information to be shared
- The reason for sharing
- A deadline upon which the consent expires

HUD representatives can access resident files without a signed consent from the resident except information that could trigger HIPPA requirements.
Service Coordinators must share information that could lead to negative consequences including self-harm, harming others, unlawful activity, or lease violations.

May share a resident’s name and contact information with a verbal approval of the resident.

Service Coordinators may not access Enterprise Income Verification (EIV) reports under any circumstances.
PROFESSIONAL BOUNDARIES AND CONFLICTS OF INTEREST

- Provide professional contact information
- Refrain from discussing your personal life
- Clear physical boundaries
- Maintain professional boundaries in social settings outside of work
- Don’t allow residents on your personal social media accounts
- Don’t take tips, cash, gifts, or loans.
- Don’t sell anything to residents.
RECORDS

- Maintain records in accordance with your company’s policies and procedures.
- Electronic versus Paper
- QA can access files
- Property operating budget
- Grants
- Combining sources:
  - Residual Receipts
  - Debt Service Savings Escrows
Owners must prepare a supportive services plan which includes the following:

- Overview of services to be provided to residents in the development including service coordination as well as any other provided services
- A description of how any services will be funded
- The property wide profile
- A statement affirming that residents will not be required to accept any supportive services as a condition of occupancy or admission
Any use of grant or project funds for a purpose other than as authorized by HUD

Breach or noncompliance with relevant laws, regulations, administrative program policies, grant agreements, or other documents approving the use of project funds

Any misrepresentation in a funding request that, if known to HUD, would have resulted in these funds on being approved.

NON-COMPLIANCE
REMEDIES

- Suspend or terminate funding
- Repayment of funding
- Legal action
- Conditional procedures for correction
- Sanctions authorized by law
- Litigation
QUALITY ASSURANCE

- Monitoring Service Coordinator's activities
  - May be onsite (preferred) or remote
- Reviewing Service Coordinator's files
- Providing technical support
- Setting goals and completing program evaluations
- Reviewing Supportive Services Plan
- Helping the service coordinator establish partnerships
- Privacy
HUD is reacting to the 2016 GAO report signaling they should be doing more to supervise the program

- More guidance
- New report requirements
- More proactive program
- More oversight