Evolution of Service Coordination

HUD's Service Coordinator in Multifamily Housing Resource Guide

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Service Coordination Origins

- 1985 Robert Wood Johnson Foundation Demonstration
- 1990 HUD begins allowing service coordination through property budgets
- 1991 First service coordination grants become available under the Cranston-Gonzales National Affordable Housing Act
- 1995 HUD awards first SC Grants for Public Housing
- 1996 First Service Coordinator Conference



20 years of AASC

Sept 19, 1999 – the day it all began

 2004 – AASC partners with Pangea and The Ohio State University

 2019 – AASC breaks attendance records at the National Service Coordinator Conference in Denver





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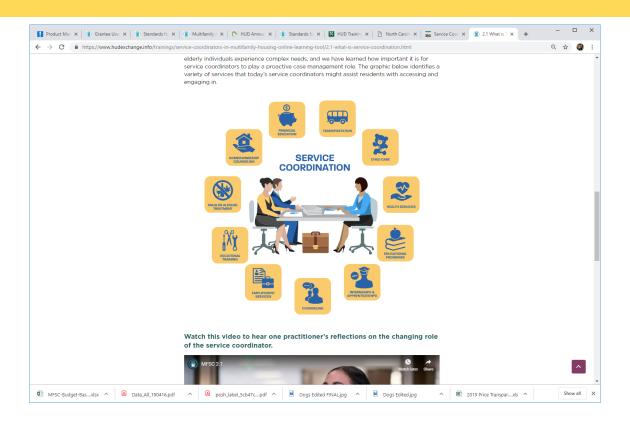
Chapter 1: Introduction

The resource guide focuses on the areas of:

- 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
- Resources for Service Coordinators
- HUD Reviews of Local Service Coordinator Programs



Chapter 2: Doing the Job of SC





Role of a Service Coordinator

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



Conducting Resident Assessments

Initial and annual assessments should include information on:

- Demographic information of the resident
- Financial resources (earnings, benefits, support from family)
- Sources of informal and formal support
- Employment status
- Interests and hobbies
- Existing social supports and networks
- Health insurance status
- Resident reported physical, cognitive, and mental health conditions*
- Activities of Daily Living (ADLs) and Instrumental Activities of Daily Living (IADLs) functioning
- Unmet needs for supportive services and resources



Resource Directory

Include for each service provider:

- Specific information on the types of services, programs, or benefits offered
- Intake and eligibility requirements
- Application forms
- Phone and email for a specific contact person





Chapter 3: Hiring and 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
- Basics of Documentation

- 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

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



Chapter 4: Confidentiality and Conflicts of Interest

A Consent to Release Information form must clearly indicate:

- With whom the information is to be shared
- Specific information to be shared
- Reason for sharing the information
- Deadline upon which the consent expires





Chapter 5: Files and Records Management

Contents of Resident Files

- Intake Form
- Resident Services Plan
- Monitoring and Follow-up Plan
- Case and Progress Notes
- Activities of Daily Living

- Service referrals
- Consents to Release Information
- Emergency contact information
- Reports/records of physical abuse
- Signed refusals to participate

AASC members have access to sample form templates!



File Maintenance and Retention

- Begin keeping files on residents at time of move in or start of service
- Keep files for at least three year after resident move-out, death, or cessation of assistance
- All files must be disposed of in a manner that will prevent any unauthorized access to personal information
- Residents can access their files if they request to do so
- HUD staff and QA supervisors can also view resident files without consent





SC Program File

The program file should include at a minimum:

- Proof of outside training requirements
- Copies of all reports submitted to HUD
- Agreements and correspondence with outside service providers that do not pertain to a specific resident
- Documentation on programs, trainings, and other educational offerings developed and provided for the residents of the property
- Supporting documentation related to program expenses and payments
- Information and/or other relevant documents from HUD, as applicable



Chapter 6: Funding, Reporting and Program Monitoring





Chapter 7: Quality Assurance

QA Tasks and Activities

- Monitor service coordinators' activities
- Review service coordinators' files
- Provide technical assistance and guidance
- Set goals and complete program evaluations
- Review the supportive services plan
- Help the service coordinator establish and sustain partnerships





Quality Assurance Report

Must cover the following topics:

- The service coordinator's accessibility to the residents
- Whether file storage is effective and secure
- Resident file contents and organization
- References to community-based providers and other resources
- Appropriate documentation of service coordinator training
- Information related to outreach efforts and wellness activities conducted by SC
- Narrative of times the QA professional provided technical assistance
- Results of surveys of management and/or residents regarding the SC program
- Review of supportive services partnerships
- Adherence to the standards in the Privacy Act of 1974



Questions?

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