

# Evolution of Service Coordination

## HUD's Service Coordinator in Multifamily Housing Resource Guide

**Melissa Harris**

Senior Manager of Government Affairs  
American Association of Service Coordinators



[www.servicecoordinator.org](http://www.servicecoordinator.org)

# 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



## HUD's Service Coordinators in Multifamily Housing Program Resource Guide



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

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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

Product Man X | Grantee Use X | Standards fo X | Multifamily X | HUD Annou X | Standards fo X | HUD Traini X | North Caroli X | Service Coord X | 2.1 What is X

← → ↻ https://www.hudexchange.info/trainings/service-coordinators-in-multifamily-housing-online-learning-tool/2.1-what-is-service-coordination.html

elderly individuals experience complex needs, and we have learned how important it is for service coordinators to play a proactive case management role. The graphic below identifies a variety of services that today's service coordinators might assist residents with accessing and engaging in.

Watch this video to hear one practitioner's reflections on the changing role of the service coordinator.

MFSC 2.1 Watch later Share

MFSC-Budget-Bas...xlsx | Data\_All\_190416.pdf | posh\_label\_5cb47c...pdf | Dogs Edited FINAL.jpg | Dogs Edited.jpg | 2019 Price Transpar...xls | Show all X

# Role of a Service Coordinator

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

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|---|---|---|
| <ul style="list-style-type: none"><li>• The Aging Process</li><li>• Federal and Applicable State Programs and Eligibility</li></ul> | <ul style="list-style-type: none"><li>• Elder Services</li><li>• Disability Services</li><li>• Legal Liability Relating to Service Coordination</li></ul> | <ul style="list-style-type: none"><li>• Drug and Alcohol Use/Abuse by Elders</li><li>• Mental Health Issues</li></ul> |
|---|---|---|

## Required Ongoing Training Areas

- |  |  |  |
|--|--|--|
| <ul style="list-style-type: none"><li>• SCMF Program Online Learning Tool</li><li>• The Role of the Service Coordinator</li><li>• Ethics in Service Coordination</li><li>• Networking in the Community and Identifying Resources</li><li>• Basics of Documentation</li></ul> | <ul style="list-style-type: none"><li>• Outcomes and Program Evaluation</li><li>• Mental Health and Aging</li><li>• Healthy Aging</li><li>• Medications and Older Adults</li></ul> | <ul style="list-style-type: none"><li>• Communication Strategies in Working with Older Adults</li><li>• Fair Housing and Reasonable Accommodations</li><li>• Professional Boundaries</li></ul> |
|--|--|--|

## Additional Recommended Training Areas

- |  |  |   |
|--|--|---|
| <ul style="list-style-type: none"><li>• Identifying and Assessing Capabilities and Needs</li><li>• Monitoring and Evaluating Services</li><li>• Effective Advocacy</li><li>• Crisis Prevention and Intervention</li><li>• Working with Other Members of the Property Management Team</li><li>• Cultural Competency</li></ul> | <ul style="list-style-type: none"><li>• Chronic Diseases of the Elderly</li><li>• Dealing with Cognitive Impairments</li><li>• Sensuality/Sexuality and Older Adults</li><li>• Mediation and Conflict Resolution</li><li>• End of Life Issues</li><li>• Isolation and Older Adults</li><li>• Effective Communication</li></ul> | <ul style="list-style-type: none"><li>• Supportive Service Needs of Persons with Disabilities</li><li>• Current Trends in Affordable Housing and Healthy Aging</li><li>• Disease Prevention</li><li>• Hoarding</li><li>• Bullying</li><li>• Creating and Sustaining Successful Partnership Models</li></ul> |
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# 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

	Semi-Annual Report	Standards for Success
Reporting Period	Due twice each year on Jan. 30 (reporting period June 1 – Dec. 31) and July 30 (reporting period Jan. 1 – June 30).	Due once per year on Oct. 30 (reporting period Oct. 1 – Sept. 30).
Reports Per Property	One report per service coordinator	One report per property
Reporting For Former SCs	Service coordinators must turn in reports for previous service coordinators	Service coordinators report only for time they're at a property
Time Tracking	Service coordinators must track and report time spent on daily tasks	No task tracking
Data Collection	Provides aggregate resident data	Provides resident-level data

# 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?

**Melissa Harris**

Senior Manager of Government Affairs, AASC

[mharris@servicecoordinator.org](mailto:mharris@servicecoordinator.org)

614-848-5958

