



# Resident Services Program

## **Service Coordination Manual**

**RESIDENT RESOURCES NETWORK, INC.**

April 2015

# Resident Services Program

## Service Coordination Manual

<b>INTRODUCTION .....</b>	<b>1</b>
WHAT IS SERVICE COORDINATION? .....	1
<i>How Service Coordination Differs from Case Management</i> .....	2
HOW SERVICE COORDINATION WORKS AT RRN .....	3
Logic Model for the Resident Services Program .....	<b>Error! Bookmark not defined.</b>
<b>SETTING UP SERVICE COORDINATION .....</b>	<b>2</b>
FINANCING AND BUDGETING FOR SERVICE COORDINATION .....	2
PREPARING THE SITE FOR SERVICE COORDINATION .....	2
DEVELOPING PARTNERSHIPS WITH SERVICE AGENCIES .....	2
<i>Prior to Starting Service Coordination</i> .....	2
ESTABLISHING A SERVICE COORDINATOR OFFICE .....	3
<i>General Design Considerations</i> .....	3
<i>Providing Appropriate Office Space for the Service Coordinator</i> .....	3
SELECTING A SERVICE COORDINATOR .....	4
Service Coordinator Job Description .....	6
TRAINING FOR SERVICE COORDINATORS .....	7
New Employee On-Boarding and On-the-Job Training .....	8
Service Coordinator Training Documentation .....	10
<b>GUIDELINES TO SERVICE COORDINATION .....</b>	<b>12</b>
ENGAGING RESIDENTS .....	12
<i>Onsite Services</i> .....	12
<i>Welcoming New Residents</i> .....	13
Resident Services Program Brochure .....	16
Confidentiality Agreement .....	18
Service Coordination Acknowledgement .....	19
Resident Consent to Release Information .....	20
<i>Surveying Residents' Characteristics, Goals, and Interests</i> .....	21
Household Survey .....	22
ASSESSING SOCIAL SERVICES FOR RESIDENT REFERRALS .....	26
SETTING UP RESIDENT FILES .....	27
DOCUMENTING SERVICES .....	27
DAP Case Notes .....	28
Case Note Form .....	29
Maintenance of Inactive Files .....	30
PREVENTING EVICTION, AND POLICY AND LEASE VIOLATIONS .....	30
CODE OF ETHICS FOR SERVICE COORDINATORS .....	31
Purpose .....	31
Ethical Standards .....	31
LEGAL ISSUES RELATING TO SERVICE COORDINATION .....	33

<i>Negligence</i> .....	33
<i>Injury</i> .....	34
<i>Discrimination</i> .....	34
<i>Conflict of Interest</i> .....	35
<i>Acceptance of Gifts</i> .....	35
<i>Handling Residents' Money</i> .....	36
<i>Mandated Reporting of Abuse</i> .....	36
EFFECTIVE MANAGEMENT: RELATIONSHIP BETWEEN THE SC AND COMMUNITY MANAGER .....	36
WEEKLY BLENDED MANAGEMENT MEETINGS.....	39
Weekly Blended Management Meeting Agenda.....	40
<b>ORGANIZING A RESIDENT COUNCIL</b> .....	<b>41</b>
WHAT IS A RESIDENT COUNCIL? .....	41
WHAT CAN A RESIDENT COUNCIL ACCOMPLISH? .....	41
WHAT ARE THE FUNCTIONS OF A RESIDENT COUNCIL? .....	42
GUIDELINES FOR STRUCTURING A RESIDENT COUNCIL .....	42
GUIDELINES FOR RUNNING AN EFFICIENT MEETING .....	42
<i>Agenda Items</i> .....	43
<i>Rules of Order</i> .....	43
RESIDENT RIGHTS INVOLVING RESIDENT COUNCILS .....	43
MANAGEMENT RELATIONS WITH RESIDENT COUNCILS .....	43
<i>Meeting Space for Resident Councils</i> .....	44
CHOOSING AN ORGANIZER.....	44
TROUBLESHOOTING COMMON PROBLEMS .....	45
<b>QUALITY ASSURANCE AND IMPROVEMENT</b> .....	<b>48</b>
GENERAL QUALITY ASSURANCE MECHANISMS .....	48
<i>Quarterly Performance Reports</i> .....	48
QUALITY ASSURANCE FOR THIRD PARTY SERVICE COORDINATION.....	48
<i>Quarterly Invoices</i> .....	48
<i>Biannual Update Meetings</i> .....	48
Invoice .....	49
Service Coordinator Quarterly Performance Report.....	50



# INTRODUCTION

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The Resident Services program of Resident Resources Network (RRN), Inc., the nonprofit arm of Wallick Communities, is a service coordination program, which connects residents of properties owned and managed by Wallick to supportive services that promote self-sufficiency and improved quality of life. It is the mission of RRN to become the regional leader in breaking the cycle of generational poverty within the communities we serve. We achieve this by being a resource network for residents who are in need of employment, education, health, and other supportive services, and by providing a safe environment.

This manual provides guidelines, information, and resources related to setting up and managing the RRN service coordination program at both multifamily and elderly housing properties owned and managed by Wallick Communities. It is intended to be a resource for Service Coordinators (SCs) and property management to use and refer to when implementing the Resident Services program, as well as when issues arise.

The guidelines contained within this manual were developed using a number of sources, including HUD SC procedures, the American Association of Service Coordinators (AASC), manuals created by other service coordination programs, and input from SCs, Community Managers, and service providers. We strongly recommend that service coordination services that are administered and/or financed through Resident Resources Network and Wallick Communities adhere to these guidelines.

The forms and resources included in the manual are samples of recommended tools. Service providers are free to use them as is, edit them to meet specific site and program needs, or use other similar documents, as long as they address the requirements of these guidelines. The entire manual and appendices are available online at [www.residentresources.org](http://www.residentresources.org) or by calling (614) 552-5668. Many of the forms in the manual are in a fillable MS Word format. Some forms are available as online tools.

## What is Service Coordination?<sup>1,2</sup>

A stressed woman with young children in Head Start, trying to move from welfare to work... the distraught mother of an infant with disabilities... a homeless young man with schizophrenia discharged from a psychiatric unit... an older woman with diabetes admitted to the medical center... a delinquent adolescent... a homeless family. Despite their disparate situations, they have a common need to access services—many services.

Service coordination, in the context of affordable housing, assists residents with gaining access to services and supports appropriate to their needs. SCs are a valuable resource and an important member of the property management team. SCs link residents to existing services and resources in the community, assist residents to build an informal support network among themselves, encourage residents to be proactive in meeting their social, psychological and physical needs, provide conflict resolution assistance as appropriate, and seek out assistance with existing community resources when needed. SCs increase the ability of residents to uphold their lease obligations such as paying rent on time, taking proper care of their units and ensuring quiet enjoyment of the property for all residents and surrounding neighbors.

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<sup>1</sup> Extracted from New Hampshire Resident Service Coordinator Manual. Available at: <http://www.nhhfa.org/rental/SCdocs/SCManual.pdf>

<sup>2</sup> Extracted from Michigan State University Best Practice Briefs <http://outreach.msu.edu/bpbriefts/issues/brief13.pdf>

SCs are an integral part of the management team and help to address many of the needs and difficulties of residents that can jeopardize tenancy. They promote effective partnerships among housing providers, Community Managers and service providers to improve a project's financial viability and stability, benefiting current and future residents and ultimately the community at large.

SCs are usually the management company's main link to the larger community in which a housing complex is located. They support efforts that enhance a resident's quality of life and build healthy communities through the active participation and cooperation of onsite management, neighborhood agencies and residents. The SC's ability to work with community agencies on behalf of the residents goes a long way in enhancing good will and the position of the housing complex as a resource in the community rather than as a drain on community resources.

From the standpoint of the service recipient, service coordination can accomplish three objectives:

- to **connect** service recipients to **needed resources**
- to **buffer the service recipient** from the stress of navigating the bureaucracy
- to **enable service recipients to manage their own lives** within the scope of their resources and abilities

From the standpoint of the agency or service system, there are additional objectives:

- to **manage resources** within defined limits to achieve cost efficiencies, effectiveness, and avoidance of preventable and unnecessary costs
- to **facilitate the delivery of service** by coordinating the contributions of multiple service providers and scheduling services so that they are provided without any delay that might adversely affect the recipient's condition
- to **avoid deterioration** resulting in the need for more costly services by keeping a service recipient connected to the agency so that medication and other services will continue to be received
- to **monitor progress**, or lack of progress, so that changes in treatment can be made in a timely fashion
- to **monitor outcomes** to determine whether existing service protocols or practices need to be revised

## How Service Coordination Differs from Case Management<sup>3</sup>

"Case management" has been defined as a somewhat limited but nonetheless important way of trying to make human services work better, i.e., the activities undertaken by a service provider on behalf of an individual or family that needs multiple services, facilitating their movement through the service delivery process. The term "case management," however, can be interpreted by service recipients as a demeaning "take-over" by professionals. Consequently, with increased emphasis on services that are driven by the expressed concerns and needs of the service recipient or family (i.e., services that are person-centered/family-centered), "case management" is being superseded in some sectors by the more neutral terms of "service coordination" and "care management."

One major difference between SCs and Case Managers is the level of education and experience required. SCs often hold an Associate's degree or higher and are not required to hold social work, or similar, licenses to be hired into the position. Case Managers positions, on the other hand, more often require the individual to hold a Bachelor's degree or higher and be licensed. However, both the SC and Case Manager are required to be skilled at establishing relations with residents and identifying

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<sup>3</sup> Extracted from Michigan State University Best Practice Briefs  
<http://outreach.msu.edu/bpbriefts/issues/brief13.pdf>

resident needs, capable of forging partnerships with local community organizations to meet those needs, and trained to

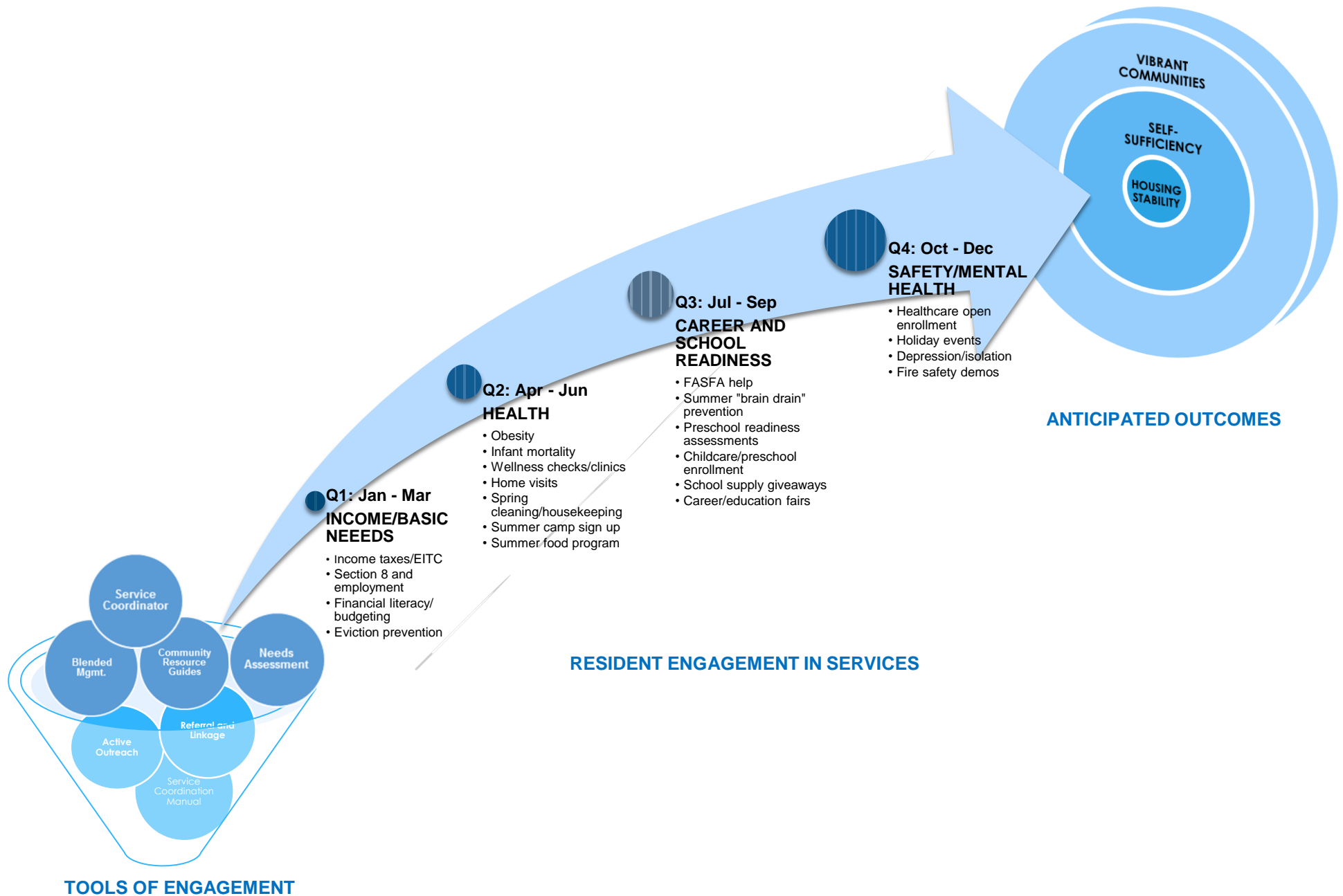
## How Service Coordination Works at RRN

A number of models exist for service coordination. Every group of housing residents has unique assets, interests and goals. As a result, there is no cookie-cutter design for resident services. There are, however, common elements. For example, at the core of every resident services program is a SC who assesses available services in the community and then builds relationships with the best providers. This enables residents to access the services they need and want.

RRN's Resident Services program primarily uses two different service coordination models: (1) Primary Service Coordination and (2) Third Party Service Coordination. Both models are designed to connect residents to supportive services and to assist them in achieving improved self-sufficiency and quality of life (see logic model below). Both models have similar elements, such as conducting resident needs assessments, documenting services, and reporting on service outcomes. The major difference between the two models is that the Primary Service Coordination model involves RRN being the provider of services, while the Third Party Service Coordination model entails RRN partnering with local nonprofit community service providers to be the provider of services. Where applicable, this manual addresses the differences between Primary and Third Party Service Coordination.

# Basic Service Coordination Model

Addressing the Needs of Low-Income Individuals and Families throughout the Year





# SETTING UP SERVICE COORDINATION

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## Financing and Budgeting for Service Coordination

The type of service coordination model used (Primary or Third Party) will largely be determined by what seems most appropriate for the housing property being served and the funding available. Currently, Service Coordinators for properties with senior and disabled residents are funded and supported through HUD funding. Service Coordinators for family properties tend to be funded by tax credit allocations that come from the property's operating budget or time-limited grant funding. HUD-funded Service Coordinators typically work more hours and focus more on social activities than do non-HUD funded Service Coordinators.

## Preparing the Site for Service Coordination

Once it has been determined that resources are available for implementing the Resident Services program at a property, an initial, introductory meeting is held between the property management staff and the Executive Director of RRN. This initial meeting is held regardless of which service coordination model is used. The meeting should be held at the site unless physical distance makes phone or video conferencing a preferred method of contact.

The following are items to be covered during the initial, introductory meeting:

- Profile of the residents
- What service coordination entails
- History of service coordination at the property
- Providers that currently service residents of the property
- Other community services that are nearby
- Next steps

## Developing Partnerships with Service Agencies

If Third Party Service Coordination is the chosen model, relationships with local nonprofit service providers are developed that can support the provision of the most comprehensive array of service options. The relationships between RRN and the service providers can be informal or formal. More formal relationships may be memorialized in agreement letters or memoranda of understanding (MOUs) between service providers and RRN and/or Wallick.

## Prior to Starting Service Coordination

Once an initial meeting is held with the property management staff, and before service coordination begins at a property, the RRN Executive Director meets with the service provider at their place of business to review roles and expectations and to secure signatures on the service agreement. Electronic signatures transmitted via email or fax are acceptable.

The following is a list of recommended items for discussion during the initial meeting between RRN and the service provider.

- Description of service provider's programs and services
- Tour of the facility
- Available budget
- Existing partnerships that can be expanded upon

- Description of RRN and its relationship to Wallick
- Developing and signing a Service Agreement
- Overview of roles and expectations (e.g., number of onsite hours, needs assessments, resident councils, invoicing, reporting, etc.)
- Service provider capacity to track referrals and get feedback from clients
- Other service providers in the community
- Next steps

## Establishing a Service Coordinator Office

SCs need an office or other private space to meet with residents. Even if the resident services coordinator has an office in another building, there should be a small office space or meeting area onsite at as many of the properties served as possible. Moreover, it is desirable to have an onsite community room for group meetings or classes, with as much storage space as you can manage. Many SCs recommend a minimum of 1,000 square feet of space to serve programs for families in 100 to 160 units.

### General Design Considerations<sup>4</sup>

Whether you have the relative luxury of planning ahead for space for your resident services or you are trying to retrofit space into an already operating property, your need for space will vary depending on what your program will be offering. Prior to hiring the SC or pursuing funding from HUD or other grant funders to support construction of a SC office, visit the site to assess the available space and document construction needs, if any. Be sure to plan for space needs in the physical design phase of the construction or rehabilitation of the housing development. Even if there is not adequate funding to finish a potential community space, attempts should be made to rough out the plumbing and electrical systems in anticipation of future use to reduce costs of retrofitting for these systems. The design should also consider the necessary insulation and windows based on both the immediate and potential uses of the room.

### Providing Appropriate Office Space for the Service Coordinator<sup>5</sup>

Planning for and providing office space for an SC in existing housing can be a challenge as it usually means the manager or maintenance person may have to give up some of their space. The HUD How-To Guide for Service Coordination states that the SC should not share space with anyone else on the management team. The reasons for this and how to prepare a space are outlined below.

Private office space is needed for:

- Confidential phone conversations
- Confidential meetings with residents or families
- Maintaining and organizing confidential records
- Problem solving complicated issues

Ways to address the challenges of no office space and options for developing new office space are discussed below.

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<sup>4</sup> Adapted from Volume One: Implementing a Basic Resident Services Program Revised and Expanded Edition. Available at: [http://residentservices.org/downloads/Volume\\_One\\_Implementing\\_a\\_Basic\\_Resident\\_Services\\_Program.pdf](http://residentservices.org/downloads/Volume_One_Implementing_a_Basic_Resident_Services_Program.pdf)

<sup>5</sup> Ibid.

- SCs can use residents' apartments for private meetings; however this may present confidentiality and liability problems. Keep in mind that not all residents are comfortable inviting the SC into their apartment.
- If someone else is in the apartment, the SC needs to ask the resident privately whether he/she is comfortable talking with the person there. Including the person on the Release of Confidentiality form is the best way to handle the situation.
- Be sensitive to the resident's feelings and the nature of the discussion when talking with a resident in front of someone else, even if it's an adult child, other family member or a service provider.
- Enclosing an area in the community room may offer potential space.
- Consideration can also be given to taking an apartment off-line and converting it to an office and/or community space if no other space is available. (Such an option needs approval from the HUD contract administrator.)
- Submit a grant to HUD to cover the costs of developing office space.
- If absolutely no space is available onsite consider forming a partnership with a community provider who may be located in the neighborhood.
- While it may not be possible to create private office space at all sites it is essential that the SC has a place to discuss confidential issues with residents without others hearing.

Essential office equipment:

- Office furniture: desk, chairs, file cabinet with lock.
- Phone, fax, copier and a cell phone.
- Computer with Internet access and printer. SCs use computers for writing reports, record keeping, documentation, communicating with service providers, searching for resident services, searching for funding of services. SCs with multiple sites may want to consider a laptop computer.
- General office supplies.

## Selecting a Service Coordinator<sup>6</sup>

At the core of every resident services program is the SC. It is the SC who develops supportive professional relationships with the housing property's residents and in the process of doing so develops an in-depth understanding of the residents' daily lives and their individual hopes and goals. The SC also identifies, assesses, selects, develops and maintains referral partnership relationships with community services resources. This enables the SC to effectively coordinate service resources that match the residents' goals, such as adult education, workforce development, financial literacy, child care and after-school programming. In some instances, an SC develops and implements programming on-site at the housing property, as the appropriate resource may not be available locally.

An SC also works closely with property management in situations in which a tenant's ability to maintain residency is in jeopardy, and provides support to assist the resident to successfully rectify the situation both on a short-term and long-term basis. Finally, after performing all of these activities, the SC is required to develop program targets, track and measure the progress of these targets and then report on a regular basis to the resident services program's stakeholders.

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<sup>6</sup> Extracted from Volume One: Implementing a Basic Resident Services Program Revised and Expanded Edition. Available at: [http://residentservices.org/downloads/Volume\\_One\\_Implementing\\_a\\_Basic\\_Resident\\_Services\\_Program.pdf](http://residentservices.org/downloads/Volume_One_Implementing_a_Basic_Resident_Services_Program.pdf)

With such a demanding array of job responsibilities, it is clearly imperative for housing management to dedicate significant time and energy in recruiting, hiring, and supervising SCs. Below is an RRN Service Coordinator Job Description, which provides an overview of the typical work components of the SC position.



## Service Coordinator Job Description

**Position:** Service Coordinator

**Direct Supervisor:** RRN Executive Director

**Purpose:**

To identify the social, emotional, employment, education, and medically related needs of all residents on an individual and group basis and provide services to meet those needs.

**Hours:**

The Service Coordinator may work with several different facilities; hours required will vary per facility. The position is part-time, Monday through Friday, and the number of hours will depend upon the facilities served.

**Qualifications:**

- Associate's degree or better in human services or related field; Bachelor's degree preferred.
- Two to three years of experience in social work or community relations.
- Excellent communication and interpersonal skills.
- Leadership ability.
- Excellent organizational skills; must be able to effectively plan, organize, develop, implement and interpret programs, goals, objectives, policies and procedures.
- Broad knowledge of community services and how to access them.
- Proficiency with Microsoft Word, Outlook, and Excel.

**General Duties:**

- Advise and assist residents in identifying community resources that can be used to achieve greater self-sufficiency.
- Work to foster a sense of community among all residents by supporting and facilitating the formation of a Resident Association. Continue to serve as a resource for the Association and as a liaison between the residents and property managers/owners.
- Coordinate special programming for residents to improve the health, wellness and general wellbeing of residents. This includes scheduling guest speakers in necessary and publicizing events within the apartment community.
- Act as a liaison and advocate between residents and community resources. Develop relationships with community service organizations and government agencies in order to create a network for residents to access needed services. Make referrals and help residents contact services.
- Maintain confidentiality with respect to special needs of residents. Professionalism is essential in this position.
- Create mechanism to monitor and evaluate services delivery and perform evaluation of resident's satisfaction with service coordination, and adjust plan to ensure resident needs are being met.
- Establish regular office hours at the project and be available to interact with and assist residents at this time.

## Training for Service Coordinators

Training is a critical aspect of the SC position, in that it keeps the SC abreast of the most recent updates and changes in laws and procedures related to service coordination. Below is a New Employee On-Boarding and On-the-Job Training form that should be used for guiding and documenting the initial training recommended for SCs by the organization. The Service Coordinator Training Documentation form should be used to document trainings that are required by HUD, and other formal recommended trainings for SCs.





## New Employee On-Boarding and On-the-Job Training

**Employee/Intern Name:** \_\_\_\_\_ **Start Date:** \_\_\_\_\_

Timeframe	Activity	With Whom	Materials	Date Completed	Notes
Two Weeks Before Start	Create work space (IT, supplies, etc.)	Shon			
Day One	Overview of RRN	Shon			
Day One	Tour of the facility and introductions	Shon			
Day One	Review job description	Shon			
Day One	Become familiar with work space				
Day One	Develop weekly schedule	Shon			
Day One	Complete necessary forms				
Week One	Create ID badge				
Week One	Review AASC Manual and Code of Ethics (online)				
Week One	Review how to use necessary forms (e.g., Mileage Report, Service Coordination Acknowledgment, Consent to Release Information, etc.)				
Week One	Review internship goals and outcomes				
Week One	Identify training needs and opportunities				
Week One	Select and visit properties to serve				
Week One	Review Yardi				
Week One	Shadow a Service Coordinator				
Week Two	Review roles and expectations with Community Manager(s)				
Week Two	Review policies, procedures, etc. that govern residency (e.g. tenant				

Timeframe	Activity	With Whom	Materials	Date Completed	Notes
	selection plan, application packet, lease agreement and related addendums, etc.)				
Week Two	Shadow a Community Manager				
Month One	NATO training				
Month One	Inform residents of presence and role				
Month One	Distribute introductory packets to residents (i.e., Service Coordination brochure/flyer, Service Coordination Acknowledgment, Consent to Release Information, etc.)				
Month One	Touch bases with faculty liaison				
Month One	Begin resident needs assessments				
Month Three	Complete CSCC mid evaluation				
Ongoing	Weekly meetings with supervisor				
Ongoing	Attend RRN board meetings				
Ongoing	Develop copies of the RRN board introductory binder				
Ongoing	Develop Individual Service Plans				
Ongoing	Coordinate social activities for residents				
Ongoing	Complete Service Coordinator Monthly Performance Report				
Ongoing	Provide feedback on program forms, policies, procedures, etc.				
Ongoing	File programmatic documents				
Ongoing	Update resource guides				
Ongoing	Complete CSCC final evaluation				





## Service Coordinator Training Documentation

Name: \_\_\_\_\_ Hire Date: \_\_\_\_\_  
 Property Name(s): \_\_\_\_\_ Total # of Hours Achieved: \_\_\_\_\_  
 Year: \_\_\_\_\_

Subject Matter	Sponsoring Organization	Statutory/ Required	Optional	Credit Hours	Date of Training
Aging process		X			
Cognitive Impairments		X			
Disability Issues		X			
Effective Communication		X			
Federal Programs		X			
Legal Liability		X			
Mixed Populations		X			
Services for Disabled		X			
Services for Elderly		X			
State Programs		X			
Substance Abuse		X			
Advocacy			X		
Counseling			X		
Crime/Self Protection			X		
Death/Loss			X		
Elderly Health Problems			X		
Ethics/Confidentiality			X		
Evaluating Effectiveness			X		
Guardianship/POA			X		
HUD's SC Program			X		
Identifying Service Needs			X		
Living Wills/Trusts			X		
Local Programs			X		
Motivation			X		
Negotiation / Brokering			X		
Networking			X		
Outreach			X		
Peer Networks			X		
Record Keeping and Reporting			X		
Resident Associations			X		
Role of SC			X		
Strategies for Services			X		
Support Networks			X		
Teamwork			X		
Volunteers, Aides, and Management Agents			X		



# GUIDELINES TO SERVICE COORDINATION

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## Engaging Residents

Engaging residents in a Resident Services program can be difficult. However, SCs are expected to work diligently to actively engage residents in services. Typically, it takes about one year for residents to become familiar with the SC and engage in services. Having a regular work schedule, consistently holding office hours, engaging with residents in the hallways and other common areas, and holding informational meetings where food is served are some recommended activities that will go a long way in helping residents become engaged in services.

## Onsite Services

The following is a list of onsite services, responsibilities, and deliverables for which the Service Coordinator assigned to the facility shall be responsible.

### Office Hours

The SC is expected to have specified office hours at the facility. The SC is to provide the Community Manager with a schedule of work hours in writing on, at least, a monthly basis. Changes in the schedule should be discussed with management prior to implementation. The SC is to display the office hours on the door of the office and throughout the facility.

### Biennial Resident Assessments

The SC is required to survey residents on a biennial basis (every other year) regarding their needs and interests. An online survey is available through Resident Resources Network (RRN) for use. In the event a provider of Third Party Service Coordination chooses to use its own survey tool, the results must be submitted electronically to the executive Director of RRN as an MS Excel document on a biennial basis. The results of the assessment are to be used to identify individual and group priority needs and to guide the implementation of programs and services. The online survey is available at <https://surveymonkey.com/s/KD92X25>.

**Deliverable Target:** During the first year of service coordination, a minimum of 20% of the residents at the facility complete an assessment, with the percentage increasing biennially as residents become more familiar with the Provider, the role of the Provider, and the services available.

### Referral and Linkage

The SC shall inform residents of the availability of services and programs available within the community. While active engagement of residents in services and programs is desired, residents may opt to refuse assistance. For residents who are interested in receiving assistance, the SC will help them with accessing services and programs that meet their individual and group needs. Onsite workshops, classes, seminars and other informational or educational sessions are acceptable means of linking residents with needed services.

**Deliverable Target:** A minimum of 80% of residents sign a Service Coordination Acknowledgement form, either affirming or refusing assistance. The SC will document at least one annual attempt to engage residents who refuse assistance.

### Resident Council

The SC will assist residents of the facility with establishing a Resident Council. Assistance may entail helping residents to identify meeting space, establish meeting schedules, develop meeting agendas, etc.

**Deliverable Target:** *A minimum of one mass distribution of information annually to residents about their right to form a Resident Council. If a Resident Council is established, the Provider will attend at least one meeting annually.*

### Documentation of Services

The development of formal individual service plans is not required. However, whenever services are provided for residents individually or as a group, the services should be documented, as well as any updates or outcomes achieved as a result of the services provided. Notes regarding the services provided should be kept in a locked filing cabinet in the Service Coordinator's office.

**Deliverable Target:** *A file is established for every resident that signs a Service Coordination Acknowledgement form in the affirmative, and services provided are documented in the files.*

### Protecting Client Confidentiality

The SC shall protect the privacy and confidentiality of residents and their files and will request written releases from residents when the need arises to disclose a resident's personal information. The only time that confidentiality may be breached is when the SC suspects cases of abuse, neglect, or exploitation. The Provider is expected to report any suspected cases of abuse, neglect, or exploitation of a resident to RRN, when possible, *before* notification of the appropriate public or private agency.

**Deliverable Target:** *A Resident Consent to Release Information form is signed before every instance of the sharing of a resident's personal information.*

### Weekly Blended Management Meetings

The SC shall touch bases with the Community Manager on a weekly basis to promote ongoing communication between the SC and property management. The meetings should be informal and brief, and focus on communicating changes in hours, activities, move-ins and move-outs, or other issues that are pertinent to service coordination, without breaching residents' right to confidentiality.

**Deliverable Target:** *Weekly meetings are held and documented on the Weekly Blended Management Meeting form.*

### Welcoming New Residents<sup>7</sup>

Moving to a new community can be a stressful time for residents. Providing information on the property's service program and the SC's role and responsibilities to every new resident prior to move in will alleviate some of the resident's stress and help him/her adjust to their new community more quickly. Follow-up by the SC within two weeks of move-in whenever possible is an effective way to begin a good relationship with each resident and to identify service needs and make appropriate referrals before a crisis happens.

A plan to make new residents aware of service coordination needs to be established and consistently followed to be effective. An information sheet for new residents that includes the SC's role, name and contact numbers, office hours and the location of the office is recommended. Ideally the manager will notify the SC as soon as possible when a new resident is moving in and provide the new resident with a brochure or flyer about the SC/Resident Services program.

When the SC meets with the new resident, it is recommended that a folder of information be provided that includes:

- RRN brochure

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<sup>7</sup> Extracted from the New Hampshire Housing Resident Service Coordinator Manual. Available at: <http://www.nhhfa.org/rental/SCdocs/SCManual.pdf>.

- Flyers and pamphlets from local agencies
- A list of supportive services offered in the area, such as:
  - Pharmacies that deliver
  - Churches, synagogues, mosques
  - Child care providers, after school programs
  - Meal sites and nutrition services
  - Transportation programs.
- Examples of the services the SC can refer to and assist in obtaining, such as:
  - Medicare, Medicaid
  - Understanding insurances statements and medical bills
  - Food stamps, commodity foods, WIC
  - Home care, housekeeping services
  - Parenting resources
  - Career counseling and job search assistance
  - Credit counseling and money management
- The property's monthly newsletter or calendar
- A written explanation of how:
  - You and the manager work together and independently
  - Confidentiality works (this is an appropriate time to have the resident sign the Release of Confidential Information Form found in Section II, SC Program Policies, Procedures and Tools
- An Emergency Information Sheet (it is not recommended for SCs to keep copies of the emergency information sheets in their files, because the material can become quickly outdated without the SC knowing; encourage the resident to update annually or sooner as information changes and to put in a place known to local EMTs).

Providers of Third Party Service Coordination can use their own assessment tool or the one approved for use through RRN. Service providers using their own assessment tools will be required to provide to the executive Director of RRN the same client-level data captured by the Household Survey in an Excel spreadsheet on a quarterly basis.



# What is the Resident Services Program?

The Resident Services program is operated by Resident Resources Network (RRN), Inc., the nonprofit arm of Wallick Communities. The program aims to connect residents of Wallick Communities and other affordable housing communities to supportive services that promote self-sufficiency and improve their quality of life. Services are coordinated through Service Coordinators, who are on-site to provide residents with information, make referrals to local community organizations, and bring resources on-site.

## What a Service Coordinator Does

- **Assessment.** Conducts assessments to identify residents' service needs.
- **Referral and Linkage.** Coordinates onsite services, programs and events. Links residents to community services.
- **Advocacy.** Follows up on referrals made. Serves as liaison between management, the community, families, and service providers. Protects residents' confidentiality.
- **Reporting.** Reports on the outcomes and impact of services. Reports suspicion or incidents of abuse, neglect or exploitation, as mandated by law.

## What a Service Coordinator Does Not Do

- Perform direct services, like the duties of home health aides, nurses or homemakers. They refer residents to services and follow up on outcomes.
- Act as Activity Directors. They can help the resident council with arranging activities.
- Share information provided by residents in confidence with others, including Community Managers.
- Serve as back up Community Managers, Leasing Agents or Drivers.

## How Service Coordinators Help

### FAMILIES, SENIORS AND DISABLED PERSONS

- **Financial/Emergency Assistance.**  
Assistance with applying for public benefits, accessing food pantries, placing customer service calls, establishing payment plans with bill carriers, etc.
- **Educational and Employment Assistance.**  
Assistance with completing college and financial aid applications, bringing mobile libraries on-site, referrals to vocational programs, etc.
- **Health and Wellness Assistance.**  
Assistance with signing up for healthcare, bringing mobile dentists on-site, arranging doctors' appointments, etc.
- **Legal Assistance.**  
Assistance with completing forms, reviewing Social Security earnings statements, reviewing death or survivor's benefits, etc.
- **Other Assistance.**  
Assistance with other needs, such as starting a resident council and creating resource guides.

### PROPERTY STAFF

#### Support for Property Staff.

- Service Coordinators can take time to address resident needs unrelated to property management.

## Benefits of Service Coordination

### RESIDENTS

- Improved quality of life
- Increased self-sufficiency
- Greater sense of community pride
- Greater independence
- Reduced number of hospitalizations and emergency room visits

### OWNERS/PROPERTY STAFF

- Improved resident satisfaction
- Increased length of stay
- Reduced crisis intervention (i.e. domestic violence, gangs, bullying, neighbor disputes)
- Reduced number of evictions
- Reduced number of vacancies

## Who is Eligible?

Any resident who lives at a property owned or managed by Wallick Communities is eligible to be served by the Service Coordinator assigned to that property. However, certain community programs and services that the Service Coordinator connects residents to may require that residents meet additional eligibility requirements.

## Getting Started

If residents are interested in taking advantage of the support offered by Service Coordinators, they can contact the leasing office, where the Service Coordinator is typically housed and can be reached during specified office hours. The Service Coordinator will also reach out to new and existing residents, providing them with an introductory letter and brochure that describes what the Resident Services program is and its benefits.

[www.residentresources.com](http://www.residentresources.com)

or

Contact your Community Manager to learn more!



**resident**  
RESOURCES NETWORK, INC.



**resident**

RESOURCES NETWORK, INC.

## Resident Services Program Brochure



Serving the needs of the residents of affordable housing communities since 2011



# I Look Forward to Meeting You!

Dear \_\_\_\_\_ Resident,

My name is \_\_\_\_\_, and I am your Service Coordinator at \_\_\_\_\_. My job as a Service Coordinator is to provide support and assistance to residents of this community in order to promote self-sufficiency and improved quality of life. This support and assistance might include things like signing up for healthcare or public benefits, accessing job training programs, being referred to food pantries, establishing afterschool programs, or bringing needed services onsite. It might also include help with understanding bills or benefits, budgeting, establishing resident councils and connecting you to other community resources that you feel you need. Attached to this letter is a brochure that gives you some additional information about the Service Coordinators and the Resident Service program.

To better serve you, I need to know what services you currently need or believe you may need in the future. So, I ask that you contact me as soon as possible at \_\_\_\_\_ or \_\_\_\_\_ to schedule a time to complete a household survey. The survey should not take more than about 15 minutes to complete and gathers information about education, employment, children and youth, health and safety. You completing the survey will help me understand the kinds of services and programs that would be helpful for you achieving whatever goals you have set for yourself and/or your family. In the event that I do not hear from you, I will visit your unit to try to get the survey completed. I can also provide you with a link to a website where you can complete the survey on your own at home.

If you feel that you are in need of assistance, or would like to drop by to say, "Hello," please feel free to do so! I can be reached at \_\_\_\_\_, or during my office hours \_\_\_\_\_. I look forward to meeting you!

Sincerely,

Service Coordinator





## Confidentiality Agreement

*Please do not distribute forms to residents. All forms should be completed by the Service Coordinator and Resident together.*

### Confidentiality is protecting another person's right to privacy

As the Service Coordinator for \_\_\_\_\_, I agree to protect your right to privacy.

To ensure that residents have trust in their relationship with the Service Coordinator, information revealed to the Service Coordinator will not be discussed with anyone else. This means that your personal information is not revealed to anyone, including property staff or your family, without your written permission, unless required by law.

We utilize a "Release of Information" form to obtain this permission. As needed, the Service Coordinator will request that you complete and sign this form. The properly executed form will allow the Service Coordinator to discuss your service needs and desires with the specified community service providers, family members, physicians, and/or other individuals in order to link you to programs and services that will assist you in achieving and maintaining self-sufficiency.

### Exceptions to right of confidentiality

Federal and/or state law may require me to disclose the following information:

- Abuse or neglect of any kind, including physical, mental, financial.
- Endangerment – residents who are a danger to themselves or others.
- Fraudulent activity and other violations of the law.
- Lease violations.
- Information pursuant to a proper court order.

### Confidentiality pledge

As your Service Coordinator, I agree to protect your right to privacy and confidentiality. I will not disclose any information about you without your written permission, unless I am required by law to do so.

Service Coordinator Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Resident Signature: \_\_\_\_\_ Date: \_\_\_\_\_



## Service Coordination Acknowledgement

*Please do not distribute forms to residents. All forms should be completed by the Service Coordinator and Resident together.*

I understand that it is my choice whether to use the service(s) available to me through the Resident Services program at my housing development. I have received a complete description of the Resident Services program from my Service Coordinator, including a brochure that reviews service(s) available to me. I understand that I can ask for assistance from my Service Coordinator at any time in the future.

☐ I am interested in participating in the Resident Services Program

☐ I am NOT interested in participating in the Resident Services Program

Service Coordinator Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Resident Signature: \_\_\_\_\_ Date: \_\_\_\_\_



## Resident Consent to Release Information

*Please do not distribute forms to residents. All forms should be completed by the Service Coordinator and Resident together.*

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Property: \_\_\_\_\_

Telephone: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

I \_\_\_\_\_ authorize the Service Coordinator for my property to disclose the following information:

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To the following person(s) or organization(s):

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The purpose of this disclosure is to:

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Information obtained by the Service Coordinator will be kept confidential and released only to those persons who have a need to know such information, as required by law, or as provided in this Release. The Service Coordinator shall adhere to all applicable laws, regulations or professional license requirements.

I understand that I may revoke this Consent to Release Information at any time by providing written or verbal notice to the Service Coordinator. This revocation will not apply to information that has been previously released or action that has been taken in accordance with, and reliance upon, this consent.

This consent (unless expressly revoked earlier) expires \_\_\_\_\_ days from the date indicated below.

Resident Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Guardian Signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

Service Coordinator Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## Surveying Residents' Characteristics, Goals, and Interests

For the resident services programs to succeed, it is imperative that SCs and service providers have a thorough understanding of the residents and their goals. The most efficient way to collect and analyze that information is through a resident survey. The results of the resident survey will help to determine when partnerships with area service agencies that you can refer residents to are warranted and when to provide services onsite.

### Developing Survey Content

Surveys should contain questions on the number of people living in each housing unit as well as residents' education levels, job status, ages and interests. Responses to questions about education level can indicate the need for afterschool programs and adult education classes. Responses to questions related to employment status can indicate the number of residents who are underemployed or unemployed and need assistance with career development or job placement. Asking about residents' interests can help you to plan for onsite speakers or workshops on personal growth that cover such topics as parenting, money management or conflict resolution. For specific examples of questions to include on resident surveys, see the sample that follows. You can photocopy the survey directly and use it as written or download and customize it through the online version of this manual, which can be found at [www.residentresources.org](http://www.residentresources.org).

### Encouraging Residents to Complete Surveys

It is always challenging to persuade residents to complete surveys or questionnaires about their needs and interests. One hundred percent participation is ideal but unlikely. Some residents may not be willing to share personal information regardless of the incentives. However, other residents simply need to be convinced that completing the survey is worth their time. Here are some strategies for encouraging residents to complete surveys:

- Personally ask residents to complete the survey to help you plan services that will benefit them and their children
- Help residents fill out the survey through one-on-one interviews
- Provide residents with the option to complete the survey electronically
- Offer incentives for completing the survey, such as a prize drawing
- Provide refreshments and child care onsite when administering the survey



## Household Survey

Greetings! In case you were not aware, Resident Resources Network, Inc. (RRN), a nonprofit organization established by Wallick Communities in 2011, operates a *Resident Services* program for your, and other affordable housing communities. The *Resident Services* program is designed to connect residents to support services that help to improve housing stability, increase self-sufficiency, and contribute to healthy, vibrant communities (e.g., eviction prevention, access to government benefits, assistance with college and financial aid applications, job training, health and wellness workshops, etc.).

The following survey is being **conducted every two years** by RRN as a way to gather some information that can help our staff bring programs and services to your housing community that will be of interest to you, your family, and your neighbors. **You are not required to provide this information and can choose to not answer any of the questions.** We are asking you to voluntarily provide this information to help us better serve you. All of your responses are strictly confidential and none of them will be shared with other residents, Community Managers, or anyone outside the surveying process, without your permission. In addition, your participation in the survey will in no way impact your housing status or current tenancy.

### Directions

Please provide the information requested below. The survey will take about 10 minutes to complete. **Only complete one survey per household.** If you prefer to complete the survey online, you are welcome to use the following link to access it: <https://www.surveymonkey.com/s/KD92X25>. Any questions you may have can be answered by the person administering the survey, your Service Coordinator, or Shon Burch at (614) 552-5668 or [sburch@residentresources.org](mailto:sburch@residentresources.org). Your Community Manager CANNOT answer questions about this survey. We appreciate your time and your input and look forward to serving you better. Thank you!

### Resident Contact Information

First Name:		Last Name:	
Address:			
City:	State:	Zip:	
Email:		Cell Phone:	
Interviewer Name (if someone other than the resident is completing the survey):			

### Section 1. Household Information

- 1.1 Are you head of household or an adult member of the household? ☐ 1Head of household  
☐ 2Adult member of the household  
☐ 3Neither head nor adult member
- 1.2 Does the Resident Services Program staff have permission to contact you about available services, events, and activities in the community, and if clarification of any of your survey responses is needed? If so, **please be sure to provide your contact information above.**  
☐ 1Phone ☐ 2Text message ☐ 3Mail ☐ 4Email ☐ 5Other ☐ 6I do not want to be contacted
- 1.3 What is the name of the housing community you live in? \_\_\_\_\_
- 1.4 How long have you lived at this property? ☐ 1Less than 1 yr ☐ 21 to 3 yrs ☐ 34 to 6 years ☐ 47 to 9 yrs ☐ 510+ yrs
- 1.5 How many people live in your household (only include persons on your lease)? \_\_\_\_\_
- 1.6 What is the primary language spoken in your household? ☐ 1English ☐ 2Spanish ☐ 3Other: \_\_\_\_\_
- 1.7 Is this a one or two parent household? ☐ 1One parent ☐ 2Two parent ☐ 3Not applicable

Please answer the following questions for **ADULTS (18yrs+)** and **CHILDREN (0-17yrs)** in your household.

ADULT Members	1.8 Age	1.9 Gender	1.10 Race/Ethnicity	1.11 Disability	1.12 Highest Education	1.13 Employment
Head of Household	<input type="checkbox"/> 1 18-20 <input type="checkbox"/> 2 21-35 <input type="checkbox"/> 3 36-60 <input type="checkbox"/> 4 61+	<input type="checkbox"/> 1 Male <input type="checkbox"/> 2 Female	<input type="checkbox"/> 1 African American <input type="checkbox"/> 2 Hispanic/Latino <input type="checkbox"/> 3 Other: _____ <input type="checkbox"/> 4 Asian <input type="checkbox"/> 5 White	<input type="checkbox"/> 1 Yes <input type="checkbox"/> 2 No	<input type="checkbox"/> 1 12 <sup>th</sup> or less <input type="checkbox"/> 2 HS grad/GED <input type="checkbox"/> 3 College grad <input type="checkbox"/> 4 Don't know	<input type="checkbox"/> 1 Employed <input type="checkbox"/> 2 Unemployed <input type="checkbox"/> 3 Retired
Member 2: Adult	<input type="checkbox"/> 1 18-20 <input type="checkbox"/> 2 21-35 <input type="checkbox"/> 3 36-60 <input type="checkbox"/> 4 61+	<input type="checkbox"/> 1 Male <input type="checkbox"/> 2 Female	<input type="checkbox"/> 1 African American <input type="checkbox"/> 2 Hispanic/Latino <input type="checkbox"/> 3 Other: _____ <input type="checkbox"/> 4 Asian <input type="checkbox"/> 5 White	<input type="checkbox"/> 1 Yes <input type="checkbox"/> 2 No	<input type="checkbox"/> 1 12 <sup>th</sup> or less <input type="checkbox"/> 2 HS grad/GED <input type="checkbox"/> 3 College grad <input type="checkbox"/> 4 Don't know	<input type="checkbox"/> 1 Employed <input type="checkbox"/> 2 Unemployed <input type="checkbox"/> 3 Retired
Member 3: Adult	<input type="checkbox"/> 1 18-20 <input type="checkbox"/> 2 21-35 <input type="checkbox"/> 3 36-60 <input type="checkbox"/> 4 61+	<input type="checkbox"/> 1 Male <input type="checkbox"/> 2 Female	<input type="checkbox"/> 1 African American <input type="checkbox"/> 2 Hispanic/Latino <input type="checkbox"/> 3 Other: _____ <input type="checkbox"/> 4 Asian <input type="checkbox"/> 5 White	<input type="checkbox"/> 1 Yes <input type="checkbox"/> 2 No	<input type="checkbox"/> 1 12 <sup>th</sup> or less <input type="checkbox"/> 2 HS grad/GED <input type="checkbox"/> 3 College grad <input type="checkbox"/> 4 Don't know	<input type="checkbox"/> 1 Employed <input type="checkbox"/> 2 Unemployed <input type="checkbox"/> 3 Retired
Member 4: Adult	<input type="checkbox"/> 1 18-20 <input type="checkbox"/> 2 21-35 <input type="checkbox"/> 3 36-60 <input type="checkbox"/> 4 61+	<input type="checkbox"/> 1 Male <input type="checkbox"/> 2 Female	<input type="checkbox"/> 1 African American <input type="checkbox"/> 2 Hispanic/Latino <input type="checkbox"/> 3 Other: _____ <input type="checkbox"/> 4 Asian <input type="checkbox"/> 5 White	<input type="checkbox"/> 1 Yes <input type="checkbox"/> 2 No	<input type="checkbox"/> 1 12 <sup>th</sup> or less <input type="checkbox"/> 2 HS grad/GED <input type="checkbox"/> 3 College grad <input type="checkbox"/> 4 Don't know	<input type="checkbox"/> 1 Employed <input type="checkbox"/> 2 Unemployed <input type="checkbox"/> 3 Retired

CHILD Members	1.8 Age	1.9 Gender	1.10 Race/Ethnicity	1.11 Disability	1.14 Current Grade Level
Member 5: Child	<input type="checkbox"/> 1 0-4 <input type="checkbox"/> 2 5-12 <input type="checkbox"/> 3 13-18	<input type="checkbox"/> 1 Male <input type="checkbox"/> 2 Female	<input type="checkbox"/> 1 African American <input type="checkbox"/> 2 Hispanic/Latino <input type="checkbox"/> 3 Other: _____ <input type="checkbox"/> 4 Asian <input type="checkbox"/> 5 White	<input type="checkbox"/> 1 Yes <input type="checkbox"/> 2 No	<input type="checkbox"/> 1 Not applicable <input type="checkbox"/> 2 Preschool <input type="checkbox"/> 3 Elementary (K-6) <input type="checkbox"/> 4 Middle (7-8) <input type="checkbox"/> 5 High (9-12)
Member 6: Child	<input type="checkbox"/> 1 0-4 <input type="checkbox"/> 2 5-12 <input type="checkbox"/> 3 13-18	<input type="checkbox"/> 1 Male <input type="checkbox"/> 2 Female	<input type="checkbox"/> 1 African American <input type="checkbox"/> 2 Hispanic/Latino <input type="checkbox"/> 3 Other: _____ <input type="checkbox"/> 4 Asian <input type="checkbox"/> 5 White	<input type="checkbox"/> 1 Yes <input type="checkbox"/> 2 No	<input type="checkbox"/> 1 Not applicable <input type="checkbox"/> 2 Preschool <input type="checkbox"/> 3 Elementary (K-6) <input type="checkbox"/> 4 Middle (7-8) <input type="checkbox"/> 5 High (9-12)
Member 7: Child	<input type="checkbox"/> 1 0-4 <input type="checkbox"/> 2 5-12 <input type="checkbox"/> 3 13-18	<input type="checkbox"/> 1 Male <input type="checkbox"/> 2 Female	<input type="checkbox"/> 1 African American <input type="checkbox"/> 2 Hispanic/Latino <input type="checkbox"/> 3 Other: _____ <input type="checkbox"/> 4 Asian <input type="checkbox"/> 5 White	<input type="checkbox"/> 1 Yes <input type="checkbox"/> 2 No	<input type="checkbox"/> 1 Not applicable <input type="checkbox"/> 2 Preschool <input type="checkbox"/> 3 Elementary (K-6) <input type="checkbox"/> 4 Middle (7-8) <input type="checkbox"/> 5 High (9-12)
Member 8: Child	<input type="checkbox"/> 1 0-4 <input type="checkbox"/> 2 5-12 <input type="checkbox"/> 3 13-18	<input type="checkbox"/> 1 Male <input type="checkbox"/> 2 Female	<input type="checkbox"/> 1 African American <input type="checkbox"/> 2 Hispanic/Latino <input type="checkbox"/> 3 Other: _____ <input type="checkbox"/> 4 Asian <input type="checkbox"/> 5 White	<input type="checkbox"/> 1 Yes <input type="checkbox"/> 2 No	<input type="checkbox"/> 1 Not applicable <input type="checkbox"/> 2 Preschool <input type="checkbox"/> 3 Elementary (K-6) <input type="checkbox"/> 4 Middle (7-8) <input type="checkbox"/> 5 High (9-12)

1.15 Do you have at least one computer with access to the internet in your household? ☐ 1 Yes ☐ 2 No ☐ 3 No, but my phone has internet

1.16 What is your **PRIMARY** source of transportation? (**check ONLY one**)

☐ 1 Personal vehicle ☐ 2 Bike ☐ 3 Bus ☐ 4 Someone else drives me ☐ 5 Walk ☐ 6 Other: \_\_\_\_\_

1.17 What is the **PRIMARY** way that you or your family pays for groceries? (**check ONLY one**)

☐ 1 Cash/debit card ☐ 2 Credit card ☐ 3 SNAP (food stamps) ☐ 4 Other: \_\_\_\_\_

1.18 Are there times when there is NOT enough food to feed you and/or your family?

☐ 1 Yes, at the beginning of the month ☐ 2 Yes, during the middle of the month ☐ 3 Yes, at the end of the month ☐ 4 No

## Section 2. Employment and Education

2.1 Are you currently employed (including legitimate self-employment)? ☐ 1 Yes ☐ 2 No

2.2 If not employed, what is the **PRIMARY** reason you are not currently working? (**check ONLY one**)

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> 1 Not applicable (currently working) | <input type="checkbox"/> 6 Lack of job experience/skills        | <input type="checkbox"/> 11 Language/literacy difficulties |
| <input type="checkbox"/> 2 Health problems                    | <input type="checkbox"/> 7 Lack of transportation               | <input type="checkbox"/> 12 In school                      |
| <input type="checkbox"/> 3 Mentally or physically disabled    | <input type="checkbox"/> 8 Lack of a valid driver's license     | <input type="checkbox"/> 13 Retired                        |
| <input type="checkbox"/> 4 Lack of child/day care             | <input type="checkbox"/> 9 Criminal record                      | <input type="checkbox"/> 14 Other: _____                   |
| <input type="checkbox"/> 5 Lack of a HS diploma/GED           | <input type="checkbox"/> 10 Caring for a disabled family member | <input type="checkbox"/> 15 Other: _____                   |

2.4 What are the **TOP THREE** fields/industries in which you, or others in your household, would like to receive certification, a college degree, or job training? **(check up to three)**

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> <sub>1</sub> Administrative/Secretarial | <input type="checkbox"/> <sub>7</sub> Health/Medical                        | <input type="checkbox"/> <sub>13</sub> Self-Employment/Own Business |
| <input type="checkbox"/> <sub>2</sub> Childcare                  | <input type="checkbox"/> <sub>8</sub> Hospitality                           | <input type="checkbox"/> <sub>14</sub> Social Services              |
| <input type="checkbox"/> <sub>3</sub> Computer/Technology        | <input type="checkbox"/> <sub>9</sub> Maintenance                           | <input type="checkbox"/> <sub>15</sub> Transportation               |
| <input type="checkbox"/> <sub>4</sub> Construction               | <input type="checkbox"/> <sub>10</sub> Manufacturing                        | <input type="checkbox"/> <sub>16</sub> Other: _____                 |
| <input type="checkbox"/> <sub>5</sub> Education                  | <input type="checkbox"/> <sub>11</sub> Personal Services (e.g. hairdresser) | <input type="checkbox"/> <sub>17</sub> None                         |
| <input type="checkbox"/> <sub>6</sub> Food Industry              | <input type="checkbox"/> <sub>12</sub> Retail/Sales                         |   |

2.5 Do you, or other adults in your household, have interest in attending college or a job training program? ☐ <sub>1</sub>Yes ☐ <sub>2</sub>No

2.6 What is the **NUMBER ONE** thing that has prevented you, or others in your household, from progressing towards attending and/or completing college or a job training/certification program? **(check ONLY one)**

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> <sub>1</sub> Unsure of a career field        | <input type="checkbox"/> <sub>6</sub> FASFA (financial aid) | <input type="checkbox"/> <sub>11</sub> Other: _____ |
| <input type="checkbox"/> <sub>2</sub> Poor grades                     | <input type="checkbox"/> <sub>7</sub> Lack of funding       | <input type="checkbox"/> <sub>12</sub> Nothing      |
| <input type="checkbox"/> <sub>3</sub> Lack of child care              | <input type="checkbox"/> <sub>8</sub> Transportation        |   |
| <input type="checkbox"/> <sub>4</sub> Owe money to a school           | <input type="checkbox"/> <sub>9</sub> Work                  |   |
| <input type="checkbox"/> <sub>5</sub> Filling out school applications | <input type="checkbox"/> <sub>10</sub> Criminal record      |   |

## Section 3. Children and Youth

3.1 Is your housing community PRIMRILY a family or senior community (i.e., are there any children at this property)?

- ☐ <sub>1</sub>Family ☐ <sub>2</sub>Senior ☐ <sub>3</sub>Mixed family and senior population ☐ <sub>4</sub>Unsure **(If "Senior", proceed to Section 4)**

3.2 If you have any children **under the age of 5** living in your household, is each child enrolled in an early childhood education center or home-based learning center (e.g., Head Start, preschool, etc.)?

- ☐ <sub>1</sub>Yes ☐ <sub>2</sub>No, not every child is enrolled ☐ <sub>3</sub>Not applicable (no pre-school age children)

3.3 For what age group(s) are there adequate youth programs available in your community? **(check all that apply)**

- ☐ <sub>1</sub>Elementary ☐ <sub>2</sub>Middle ☐ <sub>3</sub>High ☐ <sub>4</sub>All age groups ☐ <sub>5</sub>There are no programs for youth ☐ <sub>6</sub>None ☐ <sub>7</sub>Unsure

3.4 Choose **UP TO THREE** activities would you like to see in your community for children and youth. **(check up to three)**

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> <sub>1</sub> Arts and crafts               | <input type="checkbox"/> <sub>8</sub> Health and wellness educ.                 | <input type="checkbox"/> <sub>15</sub> Safe sex/abstinence educ. |
| <input type="checkbox"/> <sub>2</sub> Afterschool program           | <input type="checkbox"/> <sub>9</sub> Job skills/employment assistance          | <input type="checkbox"/> <sub>16</sub> Social/community events   |
| <input type="checkbox"/> <sub>3</sub> Computer classes              | <input type="checkbox"/> <sub>10</sub> Juvenile delinquency prevention          | <input type="checkbox"/> <sub>17</sub> Sports/physical fitness   |
| <input type="checkbox"/> <sub>4</sub> Cultural/exposure field trips | <input type="checkbox"/> <sub>11</sub> Life skills/financial literacy/etiquette | <input type="checkbox"/> <sub>18</sub> Tutoring                  |
| <input type="checkbox"/> <sub>5</sub> Dance/drill team              | <input type="checkbox"/> <sub>12</sub> Mentoring                                | <input type="checkbox"/> <sub>19</sub> Youth leadership          |
| <input type="checkbox"/> <sub>6</sub> Drug prevention               | <input type="checkbox"/> <sub>13</sub> Music (singing, producing, etc.)         | <input type="checkbox"/> <sub>20</sub> Violence prevention       |
| <input type="checkbox"/> <sub>7</sub> GED/ESL                       | <input type="checkbox"/> <sub>14</sub> Religious instruction                    | <input type="checkbox"/> <sub>21</sub> Not sure                  |

## Section 4. Health

4.1 Does everyone in your household currently have health insurance? ☐ <sub>1</sub>Yes ☐ <sub>2</sub>No

4.2 Have you, or anyone else in your household, been diagnosed with any of the following medical conditions? **(check up to three)**

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> <sub>1</sub> Arthritis | <input type="checkbox"/> <sub>4</sub> Diabetes            | <input type="checkbox"/> <sub>7</sub> Mental health/depression |
| <input type="checkbox"/> <sub>2</sub> Asthma    | <input type="checkbox"/> <sub>5</sub> Heart disease       | <input type="checkbox"/> <sub>8</sub> Substance abuse          |
| <input type="checkbox"/> <sub>3</sub> Cancer    | <input type="checkbox"/> <sub>6</sub> High blood pressure | <input type="checkbox"/> <sub>9</sub> Other: _____             |

## Section 5. Safety and Your Community

5.1 How safe do you feel in your housing community during the day?

- ☐ <sub>1</sub>Very safe ☐ <sub>2</sub>Somewhat safe ☐ <sub>3</sub>Somewhat unsafe ☐ <sub>4</sub>Very unsafe

5.2 How safe do you feel in your housing community after dark?

- ☐ <sub>1</sub>Very safe ☐ <sub>2</sub>Somewhat safe ☐ <sub>3</sub>Somewhat unsafe ☒ <sub>4</sub>Very unsafe

Comment: \_\_\_\_\_

5.3 Would you be interested in participating in a Resident Council (i.e., an organized group of residents that meet on a regular basis to discuss and come up with ways to improve the housing community and address resident concerns)?

☐ 1 Yes ☐ 2 No ☐ 3 I would need more information ☐ 4 I already participate in our community's Resident Council

5.4 What are the **TOP THREE** things that make your housing community an enjoyable place to live? (**check up to three**)

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> 1 Affordability            | <input type="checkbox"/> 8 Parks                   | <input type="checkbox"/> 15 Social events   |
| <input type="checkbox"/> 2 Childcare availability   | <input type="checkbox"/> 9 Places of worship       | <input type="checkbox"/> 16 Social services |
| <input type="checkbox"/> 3 Employment opportunities | <input type="checkbox"/> 10 Public transportation  | <input type="checkbox"/> 17 Youth programs  |
| <input type="checkbox"/> 4 Entertainment options    | <input type="checkbox"/> 11 Recreational places    | <input type="checkbox"/> 18 Other: _____    |
| <input type="checkbox"/> 5 Good neighbors           | <input type="checkbox"/> 12 Safety                 | <input type="checkbox"/> 19 None            |
| <input type="checkbox"/> 6 Location                 | <input type="checkbox"/> 13 Schools                |   |
| <input type="checkbox"/> 7 Nearby to family/friends | <input type="checkbox"/> 14 Shopping/retail stores |   |

5.5 What are the **PRIMARY** things you don't like about this community or surrounding area? (**check up to three**)

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> 1 Poor quality schools          | <input type="checkbox"/> 7 Lack of recreational facilities  | <input type="checkbox"/> 13 Unemployment                      |
| <input type="checkbox"/> 2 Lack of green areas/parks     | <input type="checkbox"/> 8 Poor street lighting             | <input type="checkbox"/> 14 Distance (from school, job, etc.) |
| <input type="checkbox"/> 3 Crime/violence on the streets | <input type="checkbox"/> 9 Lack of security cameras/systems | <input type="checkbox"/> 15 Lack of places of worship         |
| <input type="checkbox"/> 4 Crime/violence in the home    | <input type="checkbox"/> 10 Poor police/emergency response  | <input type="checkbox"/> 16 Lack of employment opportunities  |
| <input type="checkbox"/> 5 Not enough childcare options  | <input type="checkbox"/> 11 Lack of community center        | <input type="checkbox"/> 17 Other: _____                      |
| <input type="checkbox"/> 6 Lack of youth programs        | <input type="checkbox"/> 12 Lack of social services         | <input type="checkbox"/> 18 None                              |

5.6 What services would most benefit you or other adults in your household or community? (**check all that apply**)

- |  |  |   |
|--|--|---|
| <input type="checkbox"/> 1 Arts and crafts               | <input type="checkbox"/> 10 Emergency/financial assistance | <input type="checkbox"/> 19 Social events           |
| <input type="checkbox"/> 2 Childcare                     | <input type="checkbox"/> 11 ESL classes                    | <input type="checkbox"/> 20 Sports/physical fitness |
| <input type="checkbox"/> 3 College prep                  | <input type="checkbox"/> 12 Home ownership classes         | <input type="checkbox"/> 21 Transportation          |
| <input type="checkbox"/> 4 Computer classes              | <input type="checkbox"/> 13 Job/employment assistance      | <input type="checkbox"/> 22 Violence prevention     |
| <input type="checkbox"/> 5 Counseling                    | <input type="checkbox"/> 14 Legal services                 | <input type="checkbox"/> 23 Vocational training     |
| <input type="checkbox"/> 6 Cultural/exposure field trips | <input type="checkbox"/> 15 Life skills/etiquette          | <input type="checkbox"/> 24 I'm not sure            |
| <input type="checkbox"/> 7 Drug prevention/education     | <input type="checkbox"/> 16 Parenting classes              | <input type="checkbox"/> 25 Other: _____            |
| <input type="checkbox"/> 8 Financial education           | <input type="checkbox"/> 17 Religious instruction          | <input type="checkbox"/> 26 Other: _____            |
| <input type="checkbox"/> 9 GED/Adult education           | <input type="checkbox"/> 18 Small business development     |   |

5.7 Do you have additional, more specific ideas about services, activities, or programs for youth or adults that you think would be useful to bring to your housing community?

5.8 What are the best days and times for you and your family to participate in activities at the property?

Day	Mornings (before 12 PM)	Afternoons (12 PM – 5 PM)	Evenings (after 5 PM)
Sunday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tuesday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wednesday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Thursday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Friday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Saturday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5.9 Overall, how satisfied are you with living in your housing community?

☐ 1 Very satisfied ☐ 2 Somewhat satisfied ☐ 3 Somewhat dissatisfied ☐ 4 Very dissatisfied

## Section 6. Action Plan

Please only complete this section if the survey was filled out together with a Service Coordinator or intern.

Identified Need	Plan of Action	Timeframe	Person Responsible	Status



## Assessing Social Services for Resident Referrals<sup>8</sup>

Once resident needs have been identified, the next step for the SC is to learn about the different types of services available within the surrounding community that will address the identified needs. In the case of Third Party Service Coordination, the nonprofit service provider typically provides many of the needed services. If there are additional service needs, the service provider, like the SC, works collaboratively with other local community organizations to offer a more comprehensive array of services. The following is a list of services that might help to meet residents' needs.

### Education

- Adult basic education/literacy/GED
- Adult continuing education
- Work skills training
- Job placement

### Child Care

- Pre-school education
- Athletics, arts and other recreation activities

### Building Personal Wealth

- Financial literacy

### Family Services

- Parenting education, parenting support
- Drug treatment

### Public Safety, Community Improvement

- Police relations
- Conflict mediation
- Block improvements
- Community health centers
- After-school/educational support for children
- English as a second language

### Employment

- Soft skills training
- Ex-offender/adult re-entry
- Finding and keeping quality child care

### Youth and Teens

- Support for staying in school
- Self-sufficiency, asset building
- Homeownership counseling
- Family case management
- Domestic violence
- Emergency rental or utility bill assistance
- Community organizing
- Anti-gang work
- Recreation activities

### Health Care

- Funds for health care

Whenever possible, SCs should refer residents to existing services in the community rather than providing services directly. Direct service delivery places financial and organizational burdens on community development organizations. Therefore, SCs should focus first on identifying and working with local service experts, rather than trying to become the experts themselves.

In some instances, an SC develops and implements programming directly, as the appropriate resource is not available locally. Typical on-site resident services include:

- After-school care for improving educational performance or for safe havens for children
- Computer learning centers
- Financial literacy and homeownership preparation
- Organizing residents to improve community safety
- Resident social events and community-organizing events

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<sup>8</sup> Adapted from Volume One: Implementing a Basic Resident Services Program Revised and Expanded Edition. Available at: [http://residentservices.org/downloads/Volume\\_One\\_Implementing\\_a\\_Basic\\_Resident\\_Services\\_Program.pdf](http://residentservices.org/downloads/Volume_One_Implementing_a_Basic_Resident_Services_Program.pdf)

## Setting Up Resident Files

Consistent recordkeeping and documentation helps to reduce liability in the event someone questions an action you may or may not have taken. The general rule is: if it's not written down it didn't happen. SC files need to be kept in a secure location in accordance with the management company's policies. Below are a few considerations for setting up resident files.

- Start a file promptly after meeting with a resident to perform a Resident Needs Assessment or upon receiving a referral.
- Include a Service Coordination Acknowledgement form and Confidentiality Agreement in all active resident files.
- Include a Service Coordination Acknowledgement form, Confidentiality Agreement, and Resident Consent to Release Information form in all active resident files if the SC will be sharing confidential information with outside agencies, family members, or anyone else outside of their management company.
- Document action steps to be taken and follow-up done.
- If there is an incident that needs to be documented, this can be done while omitting personal information that the resident prefers to keep out of the written record. The SC can record general issues instead of specifics.

It is important to remember that each resident situation is unique and not all files will contain the same forms.

## Documenting Services

Documentation is meant to serve as a reminder of ongoing actions, situations, telephone calls, correspondence, and conversations related to service coordination. It is a log of resident progress and SC involvement. It is very important for SCs to document certain information and interactions with residents. This seems to be one of the challenging tasks of a SC's job, due to time constraints and the desire to be out working with residents, rather than writing about it!

Documentation is important for several reasons:

- It is a record of what you and the resident have done, discussed, decided, or what a resident has refused.
- It is a good reference tool, to ensure accuracy. A written document can be pulled out and reviewed to see exactly what occurred and what plan of action was determined.
- It helps support constructive and accurate communication between the SC and residents.
- In extreme situations, if there is a court/legal case pending, your notes and records may be called in to review.

Documentation should take place as soon as possible, preferably immediately following an interaction. The SC's personal judgments, opinions and unrelated information should not be included in the file notes. The SC should keep in mind that the resident file can be subject to legal review, subpoena and other court actions. Figure 1 lists some recommendations for documenting services.

**Figure 1. Good Versus Poor Documentation**

Good Documentation	Poor Documentation
<ul style="list-style-type: none"><li>• Documenting all conversations with or regarding resident</li><li>• Consistent notes providing specific details about content of conversations</li><li>• Showing follow-up on concerns and problems</li><li>• Documenting resident's refusal of services as well as acceptance</li><li>• Making sure that writing in file is legible and easy to read</li><li>• When correcting errors, correct with a line through the error, do not use white-out</li></ul>	<ul style="list-style-type: none"><li>• Sporadic and vague notes</li><li>• Admissions against interest or notes that are contradictory</li><li>• Documents a problem and then no notes on actions taken</li><li>• Only documents when resident accepts services</li><li>• Illegible documentation appears hurried</li><li>• Attempt to cover up error, especially with white-out</li></ul>

## DAP Case Notes

Case notes are a typical way for SCs to provide tangible evidence of the services being provided. SCs are able to document services using whatever model case note model works best for the SC. One acceptable example is the DAP (Description-Assessment-Plan) Case Note model (see DAP Case Note form). With this model, SCs develop case notes. Below is an example of a DAP case note.

### Description

On October 24, 2005, the manager called to say that maintenance and residents are complaining of an obnoxious smell coming from Apartment 112. This is the third time this month a smell has been reported – the manager suspects a litter box.

### Assessment

Visited Ms. Doe at her apartment on October 24, 2005. There is definitely a bad smell coming from the apartment. Ms. Doe greets me with a welcoming hug, there is a noticeable odor about her, but there is still another horrible smell in the apartment. Ms. Doe is confused, not sure why I am there, and said her mother was coming to give her a bath. The litter box did not seem to be the cause of the odor problem.

### Plan

After checking to be sure that the release of information is current, I need to contact:

- Division of Elderly and Adult Services Social Worker to inform them of changes in behavior and living environment.
- Home health agency to have a homemaker come in and clean out food areas and a personal care provider to help with regular baths.
- Volunteer involved with Ms. Doe to let the volunteer know about changes in behavior and living environment. See if the volunteer has noticed other problems.
- Family to inform them of changes in behavior and living environment.
- Manager to let her know about how the problem will be remedied.
- Mental health provider to ask if they feel this person needs a mental health evaluation.



## Case Note Form

Resident Name(s): \_\_\_\_\_ Property: \_\_\_\_\_ Unit #: \_\_\_\_\_

DESCRIPTION (a factual description of the interaction – the who, what, when, where, and why):



Signature \_\_\_\_\_ Date: \_\_\_\_\_

## Maintenance of Inactive Files<sup>9</sup>

The resident's file shall include the reason for termination and the resident's destination if he/she moved (i.e., into a nursing home, in with family, into homeownership, or another residence). Any contacts regarding the resident's termination of RSC services after the move need to be documented in the file before it is inactivated.

RRN recommends that the management company keep all inactive resident files in a secure area for a period of three to seven years, depending on the company's policy, unless otherwise required by HUD. When disposed of, all confidential information in the files must be destroyed or shredded.

Files on residents who have moved out need to include progress notes that record the move-out date, reason for move-out and, if known, the location of the new home when applicable. Include any permission given by the resident or family to share information about a move, illness, or death, or the new address of the resident.

For example:

*2/1/05, 1:00 p.m., Bessie Ingerson moved out of ABC House on 2/1/05. She is now residing at XYZ Nursing Home, Anytown, USA. Bessie stated that she would like her new address provided to other residents who request it. A.B.C.*

In the case of death, progress notes need to document the date and location of death, conversations with family and any calls to service providers canceling services.

## Preventing Eviction, and Policy and Lease Violations<sup>10</sup>

One way in which SCs can be of major help to the property management is by preventing evictions, lease violations and other potential problems between tenants and managers. This is largely accomplished by communicating regularly with managers and residents and establishing formal procedures. The eviction process in many communities can cost property owners tens of thousands of dollars. Avoiding an eviction or policy or lease violation is a win-win situation for both residents and managers. Below are some strategies that SCs and Community Managers can use for preventing evictions and policy and lease violations.

- SCs and property management staff could regularly have blended management issues where residents at risk of eviction could be identified.
- SCs could develop eye-catching flyers that address issues that typically result in evictions, such as flyers that identify the type of fraudulent activity that tends to result in eviction.
- When a notice is sent to the resident, SCs receive a copy of the notice, allowing them to approach the resident to see what assistance or mitigation is needed to avoid eviction.
- SCs could create a flyer of information describing what a resident can do when faced with eviction, such as where to find rental assistance and how to appeal property management decisions. This information could be included with the late payment and eviction notice sent out by property management.
- SCs could track the outcome of all resident contact regarding eviction notices in an Excel spreadsheet.

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<sup>9</sup> Extracted from Adapted from New Hampshire Resident Service Coordinator Manual. Available at: <http://www.nhhfa.org/rental/SCdocs/SCManual.pdf>.

<sup>10</sup> Adapted from Volume One: Implementing a Basic Resident Services Program Revised and Expanded Edition. Available at: [http://residentservices.org/downloads/Volume\\_One\\_Implementing\\_a\\_Basic\\_Resident\\_Services\\_Program.pdf](http://residentservices.org/downloads/Volume_One_Implementing_a_Basic_Resident_Services_Program.pdf)

# Code of Ethics for Service Coordinators<sup>11</sup>

## Purpose

The SC profession has an obligation to articulate its values and ethical principles. The ethical foundation of the SC profession is vital to its credibility and standing as a significant and irreplaceable part of the supportive housing team and is relevant to all SCs, regardless of their professional functions, their work setting, or the population they serve.

This code of ethics serves the following purposes:

- Identifies the core values on which the service coordination mission is based
- Establishes a set of ethical standards that should be used to guide the practice of service coordination
- Provides ethical standards to which SC professionals should be accountable
- Familiarizes new SCs and other professionals with the mission, values and ethical principles of service coordination
- Aids SCs in identifying relevant considerations when professional obligations conflict or ethical questions arise

## Ethical Standards

### Residents' Rights and Needs

The SC shall use his/her skills and competence to advocate on behalf of the residents, preserve their civil rights and take no actions that place the resident at risk of harm.

### Self-Determination

The SC shall work in tandem with residents to empower them to utilize their own abilities and provide them with choices to make decisions regarding the services they receive. The SC shall ensure that residents are involved in the linkage and/or coordination of their services and will respect and promote their right of self-determination. SCs will assist residents in their efforts to identify and clarify their goals and shall not impose their opinions or preferences on a resident. In issues involving a resident's right to freedom of choice over personal safety, the resident has a right to choose to live at risk of harm or leave needs unmet, providing he/she is capable of making that choice, harms no one, and commits no crime. All residents have a right to choose their own life-style, as long as there are no lease violations and they are fulfilling their obligations of tenancy. In instances where the SC's or resident's safety and/or well-being is threatened, the SC may need to take action to make linkages to services that may limit the resident's right to self-determination.

It must be noted that the resident has the right to refuse the services of the SC or the service coordination program if they so choose.

### Privacy and Confidentiality

The SC shall ensure the resident's right to privacy and ensure appropriate confidentiality when information is released to others. All information obtained by a SC about a resident is to be held in the strictest possible confidence. Additionally, the SC shall not discuss confidential matters in public or semipublic areas. All resident records, files and documentation should be kept in a secure location

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<sup>11</sup> Adapted from the American Association of Service Coordinators (AASC). Available at: [www.servicecoordinator.org](http://www.servicecoordinator.org)

(locked file cabinet) with the assurance it is not accessible to other staff (including management staff) and residents.

### Informed Consent

SCs shall assist and link residents to services only in the context of a professional relationship based, when appropriate, on valid informed consent (release of information). The SC may disclose confidential information only when legally necessary to prevent serious, foreseeable and imminent harm to themselves or someone else (this can include medical emergencies, domestic violence, mental health crisis, etc.). SCs providing services via electronic mediums should inform residents of the limitations and risks involved when obtaining their consent.

### Safety

A safe working environment for SCs and for residents is a necessary condition for the provision of quality services. The AASC recommends that SCs should always work in an environment that is free from preventable risks and undue hazards that threaten their safety and well-being while serving residents. Safety, self-care and the avoidance of unnecessary and excessive risk should be part of the SC's daily routines

### Service Coordinator Professional Characteristics and Attributes

The SC shall provide assistance and linkages to services and represent themselves as competent only within the boundaries of the role of the SC position.

### Competence

The SC shall endeavor to be proficient in professional service coordination and in the performance of appropriate functions striving to improve in the proficiency, effectiveness, and quality of services acquired for residents. SC's shall have a knowledge base of their residents' cultures and background and be sensitive to the diversity of their residents, encouraging acceptance among different cultural groups.

### Respect

The SC shall treat colleagues and residents with courtesy and respect and strive to enhance communication and cooperation among all parties. The SC shall maintain the integrity of the position by upholding and advancing the values, ethics, knowledge, and mission of the profession.

### Communication with Management/Owner

The SC is obligated to communicate information to management staff regarding the following:

- the SC job description/job duties
- the SC role at the property
- SC obligations as a mandated reporter
- requirements of the HUD SC program and other important information related to the role of the SC

The SC should strive to assure lines of communication with management are timely and appropriate related to pertinent resident issues, educational programming and other service issues related to management/ building policy.

The SC should avoid any personal interest or activity that conflicts or interferes with the welfare or best interest of his/her residents/ clients.

## Legal Issues Relating to Service Coordination<sup>12</sup>

The SC will create strategies to reduce the risk of legal liability by doing what is legally responsible, ethically correct and following the guidelines of their job description, their company's policies and procedures and the standards of care of the SC profession.

Potential areas of legal risk:

- Negligence
- Injury
- Discrimination
- Conflict of Interest
- Acceptance of Gifts
- Handling Residents' Money Procedure

The following information is meant to inform SCs about legal issues related to service coordination that may arise in the course of their work. While it is the responsibility of the manager to assess risk and manage potential liability as a part of the management team it is critical for the SC to be knowledgeable in these issues particularly as they may arise in the provision of service coordination. SCs are in the front line and need to be aware of what kinds of actions and statements may put themselves and their management company at risk of a lawsuit.

The procedures following each quote are intended to provide guidance to SCs in minimizing exposure to liability due to negligence, injury and discrimination in their daily work. They consist of generally accepted "best practices" for SCs and are not intended to replace the advice of an attorney. New Hampshire Housing advises management companies to consult a knowledgeable attorney when developing and implementing policies and procedures for risk management.

### Negligence

According to West's Encyclopedia of American Law:

"A person has acted negligently if he or she has departed from the conduct expected of a reasonably prudent person acting under similar circumstances..."

- Communicate clearly in writing to residents what your role and responsibilities are as their SC so that residents, families and service providers know what to expect. This can be included in the welcome packet and reviewed with residents annually and as needed.
- In general implementing a consumer-driven model of supportive services not only enhances resident autonomy, self-determination and independence it has the added benefit of reducing exposure to negligence and injury lawsuits because the responsibility for decision making remains with the resident.
- Help residents identify what they need for services, provide them with information regarding the service and contact information for the providers of the service. Make referrals only as needed. However the final decision regarding whether to use services, what services to use and which providers to contract with is the choice and the responsibility of the resident.
- When performing an assessment to determine a resident's needs explore with the resident what he/she feels is needed and provide the resident with objective information. If the resident needs a formal assessment, refer him/her to agencies that provide that service. It is important to note

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<sup>12</sup> Adapted from New Hampshire Resident Service Coordinator Manual. Available at: <http://www.nhhfa.org/rental/SCdocs/SCManual.pdf>.



that once the SC has learned of a resident problem she/he is responsible for appropriately following up.

- Document objectively what you actually see, hear and do. Avoid documenting subjective comments and hearsay. Practice good documentation – be detail oriented, consistent, neat, objective and record follow-up activities. NEVER use white out or corrective tape in records. Neatly cross through any error, initial and date.
- Stay current with the standards of care of service coordination through memberships with professional associations such as the American Association of Service Coordinators (AASC), the National Association of Social Workers (NASW), and the Association of Homes and Services for the Aging (AHSa).
- These policies and procedures and the AASC Code of Ethics constitute standards to which SCs will be held. If you are also a social worker you may be held to NASW standards as well.
- Do not perform functions, such as assessments, outside of what you have been trained to perform.
- Know and follow your job description, your organization's policies and procedures, and AASC's Code of Ethics. When in doubt ask questions of your supervisor and others in the field as to what the SC's role is in a given situation.
- Regular supervision needs to be provided to every SC; however it is especially critical to new employees.
- Included in the management company's policies and procedures should be procedures outlining potential emergencies and how to respond to them. Every site needs to have an emergency plan. Familiarize yourself with it so that you can help management implement it in case of emergency.
- Service plans for residents need to address potential emergency situations as well and outline the course of action to be taken if the emergency does arise.
- The SC needs to discuss with the resident the impact of factors that are beyond their control when they develop the service plan. Such factors include the possibility that care providers may not arrive as scheduled or at all. The resident needs to have and consider such information when making an informed decision about their service plan.

## Injury

Negligence must lead to injury for a lawsuit to have merit.

*"To establish negligence, a plaintiff must prove that the defendant had a duty to the plaintiff, the defendant breached that duty by failing to conform to the required standard of conduct, the defendant's negligent conduct was the cause of the harm to the plaintiff, and the plaintiff was, in fact, harmed or damaged."*

- Never provide hands-on care. If someone falls, don't help them up. Moving them may further injure them; call 911.
- Do not provide transportation without adequate insurance coverage. Follow your company's transportation policy.

## Discrimination

Even though discrimination in housing is generally a management issue, SCs need to be aware of issues surrounding discrimination and how even unintended discrimination may place the organization at risk of a lawsuit. For example, if the SC discusses a potential resident's disability with a service provider it may give the perception that the management company is using information about the person's disability in their decision about resident selection, which is illegal. This type of

information gathering is fine after the person has been accepted as a resident as long as confidentiality is maintained and the SC has the resident's written permission.

Federal and state fair housing laws promote equal housing opportunities. These laws make it illegal to treat a person differently in housing based on that person's race, color, national origin, disability, sex, religion or familial status (children). New Hampshire law also protects its residents against housing discrimination based on an individual's age, marital status and sexual orientation.

To encourage open communities, Fair Housing laws prohibit certain practices. It is unlawful for housing owners, landlords, housing managers, realtors and others involved directly or indirectly in the rental or sale of housing or housing lots to discriminate in:

- The advertising of an available apartment, home or housing lot.
- The rental, sale or negotiation for the rental or sale of housing.
- The provision of home financing or real estate brokerage services.

Additional information can be found at the HUD website

[http://portal.hud.gov/hudportal/HUD?src=/program\\_offices/fair\\_housing\\_equal\\_opp/FHLaws](http://portal.hud.gov/hudportal/HUD?src=/program_offices/fair_housing_equal_opp/FHLaws) and through The National Fair Housing Advocate Online at <http://www.fairhousing.com/> and through New Hampshire Legal Assistance's Fair Housing Project at [www.nhla.org/nhlaftp.php](http://www.nhla.org/nhlaftp.php).

The Americans with Disabilities Act, a federal law, protects individuals with disabilities in employment, transportation, public accommodations and communications services. Various agencies enforce the different Titles of this Act which deal with the separate areas of employment, transportation, etc..."

- Regularly attend trainings on Fair Housing and ADA to keep abreast of new court cases and standards for reasonable accommodation. Consider fair housing and ADA issues when implementing services.
- Discuss any fair housing, ADA and reasonable accommodation issues and requests with the Community Manager before responding to ensure that they are consistently handled in accordance with the management company's policies and procedures.

## Conflict of Interest

- The SC must take care to avoid any real or perceived conflict of interest. An example of conflict of interest would be serving on the board of an agency that competes with other agencies to provide contracted services to residents of the property.

## Acceptance of Gifts

- It is strongly recommended that SCs do not accept any gifts from residents or their families. Other residents may perceive the acceptance of even small gifts as favoritism toward the gift giving resident. A written policy established by the management company is the best way of handling this issue.
- It is helpful to provide this policy in the materials provided to residents at move-in and review at the SC's first visit to avoid later embarrassment to the resident.
- Suggest to residents and family members who feel offended by your refusal that a gift that benefits the residents as a whole would be acceptable.
- Having this policy in effect also reduces the risk that a resident will forget that they gave something as a gift and accuse the SC of stealing.

## Handling Residents' Money

- SCs should make every effort to encourage residents to have a trusted family member or friend help them manage their money as the need arises. If there is no one that's acceptable to them a referral to a service or volunteer agency is in order. Do not handle residents' money. The risks include being accused of mishandling funds if money is lost or unaccounted for or of taking advantage of your position of authority as a part of the management team to unfairly influence the resident. You may know and trust your residents; however in the early stages of dementia people are forgetful and may often have paranoid thoughts about others leading to false accusations.
- The SC must never accept any money from the resident or family for performing any service. The SC is always a part of the management team and volunteering to perform services outside of that position raises serious ethical and legal liability questions.

## Mandated Reporting of Abuse

SCs are required to report neglect and abuse in accordance with state laws. If you have reason to suspect neglect or abuse based on a third-party report, you are also required to report it. If in doubt, make a report to the appropriate agency; the agency will determine the credibility of the report and act accordingly.

It is strongly recommended that reports of abuse and neglect also be reported to the SC's supervisor. Reporting suspected abuse or neglect to a supervisor does not release SCs from their responsibility to report it to Adult Protective Services (APS), Division for Children, Youth and Families (DCYF), or the police.

To report abuse or neglect of incapacitated adults or elderly persons, call the APS office in your local area. To find State-specific contact information, go to <http://www.napsa-now.org/get-help/help-in-your-area/>. Contact the Division of Children, Youth, and Families (DCYF) to report abuse or neglect of children. To find statute information for a particular State, go to [https://www.childwelfare.gov/systemwide/laws\\_policies/state/](https://www.childwelfare.gov/systemwide/laws_policies/state/). Contact the police to file a report after hours. If someone is in imminent danger, call 911.

## Effective Management: Relationship Between the SC and Community Manager<sup>13</sup>

The work of the SC and Community Manager will complement each other's role in a successful and effective management team. The key to a successful relationship is based upon the understanding and clarity of each person's role and responsibility as well as the willingness and commitment to a collaborative team approach. It is critical that both parties have open communication and regularly update each other.

### Successful Management Teams:

- Are committed to the team approach and to the mission of the housing complex.
- Educate and orient all staff and residents regarding the role and responsibilities of the SC and Community Manager.
- Establish and work toward common goals.

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<sup>13</sup> Extracted from Volume One: Implementing a Basic Resident Services Program Revised and Expanded Edition. Available at: [http://residentservices.org/downloads/Volume\\_One\\_Implementing\\_a\\_Basic\\_Resident\\_Services\\_Program.pdf](http://residentservices.org/downloads/Volume_One_Implementing_a_Basic_Resident_Services_Program.pdf).

- Work to improve policies and procedures within the housing complex.
- Have mutual respect for one another's professional boundaries, roles and areas of expertise.
- Understand and recognize the benefits of one another's roles and responsibilities.
- Establish an SC referral process and form. (See Section VI, SC Reporting and Documentation Policies, Procedures and Tools.)
- Establish maintenance and management request forms and process.
- Communicate processes, policies and procedures to residents.
- Support one another and present a united team approach to residents, to the rest of the staff and to the community at large.
- Communicate effectively by providing, seeking and valuing feedback from one another.
- Establish a team process for problem and conflict resolution.
- Share knowledge of training and networking opportunities.
- Attend joint training opportunities.
- Respect and maintain resident confidentiality.
- Respond to each other in a timely, courteous and respectful manner.
- Share relevant written materials, memos, lease violations, notices and updates on a regular basis.
- Meet and communicate regularly to review challenges and successes, and to address problems and create solutions. Consider developing and using a meeting report form.
- Consider reviewing and co-signing appropriate communication to residents and staff to promote team effort.
- Follow the same policy regarding the acceptance of gifts.

**The Role of the SC on the Management Team is to:**

- Provide outreach to residents regarding entitlement programs and services available to assist them.
- Link residents with services and resources to address their needs.
- Provide support and referrals to residents to assist them in remedying lease violations to help prevent evictions and decrease resident turnover.
- Support problem-solving and mediation between residents.
- Identify potential resident problems (health-related, interpersonal, etc.) and intervene before a situation becomes a crisis.
- Coordinate with Community Manager on issues related to the health and safety of residents and building/unit maintenance.
- Coordinate the delivery of prevention programs for residents such as: home injury, safety prevention and other wellness and safety programs, social and recreational activities, and support groups.
- Develop and support resident leadership and participation in resident programs and activities.
- Maintain documentation of interactions and interventions with residents.
- Work to empower residents to advocate for themselves; to be independent and self-sufficient.
- Advocate for services for residents as appropriate.
- Promote community-building activities.
- Promote partnerships with community groups, neighborhood-based resources and organizations.

- Provide data and information for budget planning and grant applications.

**The Role of the SC is NOT to:**

- Provide social activities for residents (coordinating activities is acceptable).
- Assess resident's level of functioning (assessing service needs is acceptable).
- Provide transportation.
- Provide medical services, diagnoses or medical advice.
- Provide direct services or hands-on care.
- Perform front office administrative tasks.

**The Role of the Community Manager on the Management Team is to:**

- Assure the physical maintenance of the housing complex.
- Assure the safety and security of the complex and its residents.
- Manage the property.
  - Handle new admissions.
  - Market the housing complex.
  - Promote resident retention.
  - Collect rent, manage occupancy issues, enforce the lease and deal with compliance issues.
- Monitor the budget and be responsible for other financial management.
- Provide information and referrals to the SC.
- Assist and participate in the planning of activities and services and coordinates activities with service providers as needed.
- Adhere to and comply with government and funding source regulations and requirements.
- Supervise property staff (sometimes this includes the SC).

**The Dual Role of the SC and Community Manager**

Sometimes a Community Manager is asked to take on the additional role of service coordination. While this is not a common practice around the country, there are quite a few Community Managers that are also the SC for the property. This can be an acceptable way of bringing service coordination to a property that cannot afford a separate SC position; however, it is important to be aware of potential conflicts and dilemmas that may arise and to be prepared to respond appropriately.

Balancing the duties of both positions within the allocated time is often difficult— management issues often appear pressing and time sensitive and may push out the seemingly less urgent service coordination responsibilities until the issues become critical.

Being a successful manager and a successful SC require similar but somewhat different knowledge bases and skill sets. One individual may not have all the requirements to be successful in both positions. Attending trainings specific to each field is important.

Alternating "hats" as needed may be confusing to the residents. Where possible, set up specific times for residents to come to you for assistance with services that are not urgent. When handling a difficult resident situation utilize community resources to give yourself and the resident as much support from others as possible.

## Weekly Blended Management Meetings

Weekly blended management meetings are an effective way to develop and nurture the relationship between the SC and property staff. These weekly meetings provide opportunities for the SC and property staff to “touch bases” regularly about potential services needs that residents may have. Such a meeting can be formal or informal.

While the SC must respect residents' right to privacy and is not permitted to divulge the types of information residents share with them, the SC, Community Manager, Maintenance Techs, and other property staff can use the weekly blended management meeting as an opportunity to apprise each other of emerging concerns, upcoming events, changes, to schedules, and other information pertinent to service coordination. The meetings do not have to be formal, hour-long meetings. They can be brief and informal. The Weekly Blended Management Meeting Agenda form can be used to guide and document discussions at the meeting.



## Weekly Blended Management Meeting Agenda

<b>Meeting Date:</b>	<b>Property:</b>
<b>Attendees</b>	
<b>Service Coordinator:</b>	
<b>Community Manager:</b>	
<b>Maintenance Tech:</b>	

Agenda Item	Resident	Resident Follow-Up	Service Coordinator Follow Up	Community Manager Follow Up
Move-Ins				
Move- Outs				
Rent Issues				
Nuisance Behavior Issues				
Unit Issues				

Upcoming Community Events and Resident Meetings		
Date/Time	Event/Meeting	Tasks and Responsibilities

# ORGANIZING A RESIDENT COUNCIL<sup>14,15</sup>

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Helping to organize a resident council is one of the major responsibilities of a SC.

## What is a Resident Council?

A Resident Council is an organized committee of residents formed to represent all of the residents housed at their property. Its purpose is to provide a forum for residents to be a part of the decision-making process that affect their daily living. An effective Resident Council meets the needs of the residents it serves.

HUD recognizes a resident council as an “official” entity when it meets the following requirements:

1. The council is representative of the residents.
2. The council adopts written procedures outlining the regular election of officers.
3. The council has a democratically elected governing board made up of residents.

The main purpose of any council is to give residents a forum to voice their concerns and ideas and bring residents together to build community.

Resident councils can be as small or as large as your community chooses to make it.

Some councils prefer to have bake sales, yard sales and coffee cloches to raise their funds to support the council. Other councils apply for grants and/or are funded through housing authorities. The ways to fund, organize and run a council are as varied as the people organizing them.

## What Can a Resident Council Accomplish?

What CAN'T a resident council accomplish? There is strength in numbers. A resident organization can be a catalyst to great things. It can be a force to create healthy working relationships among residents, management, and the broader community and an enhanced quality of life for residents.

Examples of possible activities for a resident organization include:

- Care for and beautify yards and grounds.
- Create community gardens.
- Help arrange for onsite childcare.
- Establish safety programs, such as Neighborhood Watch.
- Arrange loaner fishing rods and materials to teach residents how to fish
- Hold an annual kite workshop, and kite flying contests.
- Hold an Easter egg hunt; a Halloween Haunter Housed, and hay wagon rides.
- Organize onsite basketball tournaments for children, teens, and adults.
- Host a summer block party with refreshments and a DJ.

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<sup>14</sup> Source: SSP Manual Resident Organizations. Available at:

[http://www.phfa.org/forms/housing\\_services/resident\\_organizations/mf\\_hs\\_manual\\_04\\_res\\_org.pdf](http://www.phfa.org/forms/housing_services/resident_organizations/mf_hs_manual_04_res_org.pdf)

<sup>15</sup> Maine State Housing Authority Program Guide † Service Coordination. Available at:

<http://www.mainehousing.org/docs/default-source/program-guides/resident-services-coordination-program-guide.pdf?sfvrsn=5>



## What Are the Functions of a Resident Council?

- Meet once a month, or on a regular basis.
- Discuss matters that affect the quality of life of all residents.
- Form committees to address special interest (food, games, etc.).
- Meet with Community Manager (for information and discuss concerns).
- Meet with Resident Resources Network, Inc. to provide updates of activities, progress, and challenges.
- Plan, assist with, and implement resident activities.
- Communicate decisions and recommendations to all residents.
- Encourage resident participation.

## Guidelines for Structuring a Resident Council

- Have a set of rules (approved by the office of Resident Resources Network).
- Election of Resident Council members should take place every three (3) years.
- Elect officers (one or two terms).
- Officer terms should be staggered. Example - President and Secretary are elected one year while the Vice President and Treasurer are elected the following year.
- Each officer shall hold office until his or her successor shall have been duly elected and shall have been qualified or until his or her death or removal by at least 10% of the voting membership of the residents.
- Have a committee of six (6) – eight (8) people who reside at the property.
- Have a planned meeting agenda.
- All procedures must assure fair and timely elections.
- Resident Council oversight by Resident Resources Network.
- If an officer resigns before his or her term, another resident can be appointed by the resident council to serve out the term of that position.
- The Resident Council Board must consist of democratically elected residents who reside within the building or development.
- Invite the Community Manager to attend the meeting after business of the council has concluded.

## Guidelines for Running an Efficient Meeting<sup>16</sup>

A key component in getting and keeping resident interest is the quality of the council's meetings. If meetings are unproductive, members tend to be unproductive or do not attend. A high quality meeting requires planning, an agenda, and rules of order. A notice of the date, time, and location of the meeting should be sent several weeks before the scheduled meeting. Even if the meeting is always the same day of each month, a reminder notice is important. And always start, and end, on time.

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<sup>16</sup> Extracted from the Vermont Resident Service Coordinators Resource Guide. Available at: [http://www.vSC.org/documents/2\\_vSC\\_guide.pdf](http://www.vSC.org/documents/2_vSC_guide.pdf)

## Agenda Items

- **Welcome.** Review Agenda. Ask members if they have additional agenda items and the Chairman may place some of these items under new business.
- **Approve minutes of last meeting.** Minutes may be read or sent out in advance. A member should make a motion to approve, second, discuss, and then vote.
- **Old Business.** The only items belonging in this section are ones raised at previous meetings. The Chairman should remind the members when the item was raised originally and why it was postponed.
- **New Business.** Reports from Treasurer/Budget/Finance or other standing committees. Any other major items of business. Member should make a motion to approve, second, discuss, and vote on each item.
- **Good and Welfare.** Many organizations provide an opportunity for members and guests to make short announcements, raise issues to be discussed at future meetings, or to comment on items of interest.
- **Adjourn.** No formal action is needed. The Chairman announces the date, time, and place of the next meeting, reminds members of steps to be taken before the meeting, and adjourns the meeting.

## Rules of Order

Members who wish for a policy to be adopted or an action to be taken should be recognized by the Chairman before they speak. Then they begin the discussion by making a motion. If another member seconds the motion, discussion can begin; if not, the motion fails. Once a motion is seconded, the Chairman opens the floor for discussion. Members are recognized by the Chairman before they may speak, and they can discuss only the motion on the floor. When the discussion has ended, the Chairman announces that a vote will be taken. Voting: The easiest way to vote is by a show of hands. The Secretary can then record the vote. If more than a majority of residents approve an action, it is adopted.

## Resident Rights Involving Resident Councils

Residents of HUD-assisted multifamily housing developments have the right to:

- Organize as residents without obstruction, harassment, or retaliation from property owners or management.
- Post materials in common areas and provide leaflets informing other residents of their rights and of opportunities to involve themselves in their project.
- Use appropriate common space or meeting facilities to organize or to consider any issue affecting the condition or management of the property. This may be subject to a reasonable, HUD-approved fee (if applicable).
- Meet without the owner/management present.
- Be recognized by property owners and managers as having a voice in residential community affairs.

## Management Relations with Resident Councils

Owners/agents must recognize legitimate resident councils that meet regularly, operate democratically, are representative of all residents in the development, and are independent of non-resident owners and management agents. Owners/agents may not impede the reasonable efforts of residents to organize or activities of resident councils to reasonably represent resident interests.

## Meeting Space for Resident Councils

1. Owners/agents are expected to provide an accessible meeting space within the premises of the development for legitimate resident associations to hold meetings.
2. Owners/agents may not reasonably withhold the use of community rooms or other available space within the development when requested by:
  - A resident council in connection with the representational functions of the organization; or
  - Residents seeking to organize or to collectively consider any matter pertaining to the operation of the project.
3. The following restrictions apply to fees for resident use of community rooms:
  - In projects subject to budget-based rent reviews, owners/agents may not charge residents a fee for the use of such rooms.
  - For all other projects, owners/agents may charge residents a fee for the use of these facilities only if a fee is normally charged for use of such space. The owners/agents do not normally charge organizations for the use of this space. HUD does not approve the fees for such facilities.

## Choosing an Organizer

HUD defines an organizer as “a tenant or non-tenant who assists tenants in establishing and operating a tenant organization, and who is not an employee or representative of current or prospective owners, managers or their agents.”

Once an organizer is chosen, he/she then sets a date, time and location for the first meeting. It is up to the residents if they want to invite management to this first meeting or any subsequent meetings. Officers are nominated and elected at either this first meeting or at a second meeting. Officers may include a President, Vice-President, Secretary and Treasurer. This council then sets goals and objectives for their organization. These can be based on resident survey, discussions at the first meeting and the philosophy and goals of council leaders and members. The council should also develop policies and bylaws that serve as the rules and regulations of the councils. These will include how matters are brought to the attention of the council, attendance policies, speaking guidelines, voting stipulations and other procedural matters.

The council should schedule regular meetings. It may elect to meet more frequently in the early stages until a sound working relationship has been developed. It must establish a way of communicating with members/potential members/management through newsletters, flyers, and telephone trees. Everything the organization does must be publicized for everyone in the group and building to see.

A major goal of the council is to establish credibility and viability by timely follow-ups on all commitments, however great or small. Leaders should bring suggestions from members, listen to them, respond to each person and follow up on all promises. Council prestige can be enhanced if the leaders inform the entire group of all plans, activities and accomplishments and all decisions are made democratically. Managers and SCs can assist with this by always giving public credit to individuals active in the council.

Resident Councils are made successful with:

1. A vision of how to make the community better
2. Specific goals to make that vision a reality
3. Cooperative relationships
4. Strong and democratic leadership
5. Teamwork within the council
6. A code of ethics developed by council members and included in written bylaws
7. Patience, faith and lots of hard work!

## Troubleshooting Common Problems<sup>17</sup>

### **Difficulty in finding residents willing to hold office**

- Meet with residents face-to-face. Find out about their gifts and interests, and sell the job to their interests.
- Make the term and scope of officer duties manageable.
- Arrange for leadership training.

### **Residents are hesitant to preside at meetings**

- Initially, the SC, resident leader, or community organizer can chair the meeting while helping residents build their leadership skills. Have officers share the duties so that no one feels overwhelmed.

### **Poor attendance at meetings**

- Hold meetings regularly, at the same time, in the same place.
- Make sure that all residents know when and where meetings take place. Use flyers, announcements on the bulletin board, newsletter, etc.
- Start with simple activities, projects that are exciting and have wide appeal and let everyone know what they will be.
- Start with success. Nothing is as attractive as success.
- Make the meetings fun as well as productive.

### **Members focus on personal issues instead of group issues during meetings**

- Acknowledge the importance of the issue. Arrange for a private meeting later.
- If there is a grievance committee, the resident may be referred there.

### **Members are disruptive. Overly talkative members should be tactfully interrupted**

- Acknowledge the person's contribution, then ask others to add their comments.
- Argumentative members - Keep your cool and make sure others keep theirs. Ask for clarification and specific examples of general complaints. Steer discussion away from personal attacks to dealing with the issues raised. After the issues have been discussed, summarize and move on to the next point. If he continues to argue, explain that the issues have been covered, and offer to meet with him privately after the meeting to resolve any remaining personal issues.

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<sup>17</sup> Extracted from the Vermont Resident Service Coordinators Resource Guide. Available at: [http://www.vSC.org/documents/2\\_vSC\\_guide.pdf](http://www.vSC.org/documents/2_vSC_guide.pdf).

- Know-it-all - Acknowledge her expertise. Assure her that she has a valuable contribution to make, and then seek comments from other members. Give her more responsibilities. (Sue, we will be able to tap your experience in fund-raising. Does anyone have similar experience? )

### **Members are passive**

- Shy - Call on him by name and smile at him. Ask him easy questions, especially about his area of knowledge. Give him an assignment.
- Disinterested - Ask her direct questions about her area of special knowledge. Ask her advice. Mention something she said to you at another time. Give her an assignment.



# QUALITY ASSURANCE AND IMPROVEMENT

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RRN uses a number of quality assurance activities to ensure that residents are receiving quality services. Below is a description of the quality assurance methods and processes used, including those used for all service coordination in general and those used specifically for third Party Service Coordination.

## General Quality Assurance Mechanisms

The following are quality assurance mechanisms that are to be used for all the service coordination models employed by RRN.

### Quarterly Performance Reports

The SC shall submit an online quarterly performance report to the executive Director of RRN of the services and programs provided to the residents of the facility. The report is online and is available at <https://www.surveymonkey.com/s/LDQ6Z8P>.

**Deliverable Target:** Reports are submitted April 30<sup>th</sup>, July 30<sup>th</sup>, Oct 30<sup>th</sup>, and Jan 30<sup>th</sup> of each year.

## Quality Assurance for Third Party Service Coordination

A number of quality assurance mechanisms have been instituted that specifically apply to Third Party service coordination, including quarterly invoices and biannual update meetings. Descriptions of these mechanisms are listed below.

### Quarterly Invoices

The service provider shall provide a quarterly invoice to the Executive Director of RRN that outlines all services, and associated costs, provided to residents for the quarter. Invoices must reflect the required number of service hours and types of services specified in the Service Agreement.

**Deliverable Target:** Invoices are submitted April 30<sup>th</sup>, July 30<sup>th</sup>, Oct 30<sup>th</sup>, and Jan 30<sup>th</sup> of each year.

### Biannual Update Meetings

The Provider is expected to meet biannually (twice per year) with the Executive Director of RRN via phone or in person to ensure services are being provided in the manner expected, to troubleshoot issues, and to identify opportunities for improvement. The meeting time is to be included in the service hours.

**Deliverable Target:** A phone conference or in-person meeting is held biannually with the Executive Director of RRN.

replace with  
**LOGO**

# Invoice

Community Action Organization of Ohio

Attn: Mrs. Executive Director  
1234 Reading Road, Cincinnati, OH 43040  
(513) 642-4986

[edirector@caooo.org](mailto:edirector@caooo.org)

TO:

Resident Resources Network, Inc.  
Attn: Dr. L. Shon Bunkley  
6880 Tussing Road, Columbus, OH 43068  
(614) 552-5668  
[sbunkley@residentresources.org](mailto:sbunkley@residentresources.org)

**INVOICE NO.:**

DATE: 2/12/2015

**PROPERTY NAME:** Fair Park Apartments

PROPERTY NO.: 382

**CONTRACTED SERVICE HOURS PER WEEK:** 3

REPORTING PERIOD: Sep - Dec 2014

[illegible]

TOTAL NO. of HOURS:	16.5
TOTAL INVOICE AMOUNT:	

## Office Use Only

*I have reviewed the activities and hours listed above, and they are accurate to my knowledge.*

*I have reviewed the activities and hours listed above and approve this invoice for payment.*

Community Manager Signature

Date \_\_\_\_\_

RRN Executive Director Signature

Date





## Service Coordinator Quarterly Performance Report

Report Month & Year:		Property:		Total # of Residents:	
Service Coordinator:		# of Units:		Total # of Service Hours:	
Organization:		Date:		Active Resident Council:	

### Service Coordination Performed

# of Residents Served:		# of Assessments Completed:		# of Residents Referred:	
New:				# of Referrals Made:	
Ongoing:					

Type of Service	# of Residents
Advocacy	
Assessments	
Benefits/Insurance	
Case Management	
Child/Day Care	
Computer Training	
Conflict Resolution	
Crisis Intervention	
Education (GED, etc.)	
Emergency Assistance	
Family Support	

Type of Service	# of Residents
Financial Management	
Financial Aid	
Healthcare	
Home Management	
Homemaker	
Home Ownership	
Job Readiness	
Lease Intervention	
Legal Assistance	
Meals	
Mental Health	

Type of Service	# of Residents
Monitoring	
Parenting	
Prescriptions	
School Intervention	
Substance Abuse	
Transportation	
Veteran Services	
Vocational Training	
Youth Programs	
Other _____	
Other _____	

Time Allocation	% of Time
Community Outreach	
Documentation	
Group Activities	
Individual Assistance	
Internal Meetings	
Planning	
Training	

### Outcomes

# of residents <b>enrolled in</b> educational/vocational training programs:		# of residents who obtained employment:	
HS/GED/ESL:		# of residents whose income increased:	
College:		# of residents who avoided eviction:	
Vocational:		# residents who stayed at property 3+ years:	
# of residents who <b>completed</b> educational/vocational training programs:		# of residents who moved to home ownership:	
HS/GED/ESL:			
College:			
Vocational:			

Are there exciting things happening or resident successes at this property that you would like to share? If yes, please use the box below to explain.

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