Developing and Running a Supportive Services Program

Introduction

The Pennsylvania Housing Finance Agency (PHFA, or the Agency) initiated its Supportive Services Program (SSP) in subsidized housing for elderly residents in 1988. The Agency's efforts were funded by the Robert Wood Johnson Foundation as part of an initiative to demonstrate that services could be provided efficiently and appropriately to allow older residents to age in place and delay institutionalization. The program that grew out of this initiative is called the Section 8 Supportive Services Program (Section 8 SSP).

In addition to the Section 8 elderly sites, there are many other developments within the Agency's portfolio that provide services for residents including developments funded through the Agency's PennHOMES and Low Income Housing Tax Credit programs, as well as other funding resources.

In 1991, the Board of the Pennsylvania Housing Finance Agency established the Family Supportive Services Program (FSSP) in PHFA-financed properties to enhance the ability of low-income families to meet their lease obligations and to improve their quality of life.

The Supportive Services Program goals include:

- Preserve the Agency's affordable housing stock for low-income populations.

- Increase the ability of residents to uphold their lease obligations, such as paying rent on time, taking proper care of the unit, and ensuring quiet enjoyment of the property for all residents and surrounding neighbors.

- Promote effective partnerships between housing providers, property managers, and service providers to improve a development's operating costs over time, benefiting future residents, and ultimately, the community at large.

- Support efforts and services that enhance a resident's quality of life, build healthy communities, and stabilize families in need.

- Enhance the quality of life of elderly residents, enabling them to age in place and maintain their independent lifestyle.

The Housing Services Department of PHFA (the Department) is charged with monitoring sites for program compliance, providing technical assistance in order to improve and enhance services to residents.

Program Philosophy

Supportive services, or service enriched housing, involve the integration of a social service system into the ongoing operation and management of affordable housing.

The resulting supportive environment contributes to a stable resident population and decreased management costs. Secondary benefits include improved maintenance within apartments, improved relations between management and residents, and increased resident satisfaction. These benefits have resulted in protection of property values through improved unit maintenance, a more stable resident population, and the increased marketability of service enriched housing.

The Agency's SSP relies on three basic principles:

- Voluntary participation – Services are not mandated, nor are they bundled or packaged in such a way to force residents to purchase or accept services they do not want.

- Universal availability – Services are available to all residents without eligibility requirements.

- Resident input – The services provided and the service delivery method are determined, in part, by resident needs and interests.

Because sites are encouraged to tailor services to the specific needs and interests of the resident population, supportive services programs may vary considerably between sites and over time. However, most resident needs and interests involve the following broad service categories:

Senior Developments	Family Developments
- Activities, education, and recreational opportunities - Health services and screening - Housekeeping and errands - Nutrition - Resident organizing and leadership opportunities - Service Coordination - Community outreach - Transportation	- Activities, education, and recreational opportunities for adults and youth - Job training and development - Life skills, including household maintenance, parenting, and budgeting - Resident organizing and leadership opportunities - Service Coordination - Community outreach - Transportation

Training and Technical Assistance

One of the Housing Services Department's primary functions is to act as a catalyst for information exchange. The Department distributes *Quick Connections*, a monthly electronic news service and coordinates a variety of training and instructional sessions for service and housing professionals.

1. Objectives

The objectives of the SSP training programs are:

- To improve the ability of on-site service staff and managers to provide appropriate, high quality supportive services for residents of their properties.

- To enhance access to community and regional services and programs.

- To create a network of housing professionals able to assist each other in their quest to provide service-enriched housing.

2. Training Formats

The Department provides training in three different formats each year. Together with its site monitoring process, the Department's conference, workshops, and forums allow for technical assistance ranging from individual consultation to a state-wide conference with several hundred in attendance.

- The annual Housing Services Conference allows participants to choose from a wide variety of topics and multiple training tracks, including issues impacting property and site managers and service providers for both senior and family properties.

- Regional Professional Development Workshops are daylong sessions that allow a single aspect of service-enriched housing to be examined intensely.

- Supportive Services Forums are opportunities for staff from within a common geographic region to develop relationships with each other, exchange information, and learn about service options and developments in their area.

3. Mentoring Opportunities

The Housing Services Department encourages the development of mentoring relationships to assist new on-site supportive services staff in their role as service coordinators. The Agency's Housing Services Representatives can provide information and help link new service coordinators with experienced professionals in their geographic region.

Developing a Supportive Services Program

Models of Service Provision

There are three distinct models of service provision used in service-enriched housing, although there are many variations on each. The model best suited to a particular site will depend on factors specific to the management agent, the community, and the resident population. The three basic models are:

1. **An in-house service program**

   Management may hire staff to provide and/or coordinate services for residents. A service coordinator may be the foundation for a supportive services program. Many sites also employ a resident aide, activity director, or van driver to provide direct services for their residents.

   It is essential under this model that a clear delineation of responsibilities be made. Service staff and management must understand their respective roles while supporting each other in their varying but complementary functions.

   Hiring in-house may be most appropriate when the management company has the capacity to provide adequate supervision and resources for staff development. Many larger management companies have distinct social services divisions within their organizational structure to provide that training and supervision.

2. **Contract with a community-based organization**

   If an appropriate service agency is available, management may choose to contract with that agency to provide and/or coordinate services for residents. Many different types of agencies may fill that role if their mission is compatible with the type of services needed by a particular site. Contractual arrangements have been established with Senior Centers, Area Agencies on Aging, hospitals, Community Action Agencies, Public Housing Authorities, Community Development Corporations, Family Service Centers, and a variety of human service agencies.

   Some questions to ask before you commit to a service provider are:
   - Is this service provider's mission consistent with the goals of the plan of services?

   - Does this service provider have significant experience and success serving the population that will be housed in this development?

   - Is this service provider currently involved in service-enriched housing?

   - Is this service provider respected and do they have a good reputation for collaborating with other organizations in the community?

   - Does this service provider have the capacity to take on this additional role? Do they have the organizational, staffing, and resource capacity to implement the plan of services?

Only if the answers to the above questions are "yes" should the organization be considered as a potential service provider for the housing development. If there are several "no" answers, it would be best to look for a more appropriate service provider in the community.

For contractual arrangements to function smoothly management and the service provider must delineate expectations and program outcomes, communicate effectively during regularly scheduled meetings, and collaborate on joint projects. Refer to sample Checklist for Agreements for Contracted Services and Agreement for Contracted Services located under Sample Documents and Forms.

3. Co-location of service providers on-site

There are a variety of ways in which services can be located on-site without hiring or contracting for services. Commercial space may be rented to agencies or groups that serve residents, such as physician offices or kitchens that prepare home-delivered meals. Space within a site's management offices or community space may be used by non-profit organizations for the express purpose of meeting the service needs of residents. Common examples include locating a senior center or day care center in the community room or providing office space to community development organizations or aging service agencies.

If co-location is to be a viable option, the mission of the organization must be compatible with meeting the service needs of residents. If the organization usually only targets a specific subset of the population, it must be prepared to expand to serve all residents equally.

In some situations, a service organization that locates itself within the walls of a housing development may choose to continue to serve the larger community, not just the development's residents. Prior to establishing such an arrangement, management and the service provider must come to an understanding regarding several issues:

- Non-resident access to site facilities and property, including parking.

- Balancing services to residents and non-residents.

- Allocation of staff time and budgetary requirements.

- Tax credit implications of serving non-residents.

Basic Models of Service Delivery

Model	Service Delivery	Advantages (+) and Issues (▪)
In-house Service Provider	Management company or owner hires staff to coordinate and/or provide services. Staff at a senior site may include a service coordinator, activities director, and van driver or housekeeping aide. Staff at a family site may include a service coordinator, youth activities director, counselor, or other category of service provider.	**+** Management has nearly complete control over services and staff. **+** Services are made available without the eligibility requirements that are often imposed by external service providers. ▪ There must be a clear delineation and separation of roles and responsibilities between the service provider and management. ▪ Capacity is limited by funding and expertise of staff. ▪ Management must have the capacity for adequate supervision and staff development.
Contract with a Community-Based Organization (CBO)	Management company pays a CBO to provide and/or coordinate services for residents. Many different types of agencies may fill that role, e.g., senior centers, AAA service providers, hospitals, community action agencies, public housing authorities, community development corporations, family service centers, and a variety of human service agencies.	**+** Management maintains some degree of control through the contract. **+** The site benefits from an expansive network of staff, programming, and expertise. ▪ The mission of the CBO must be compatible with management and resident needs. ▪ The CBO may already be serving that population. ▪ Effective communication and coordination of efforts is crucial between the CBO and management. ▪ Expectations should be clearly set forth in the contract and in every interaction with the CBO.
Co-location of Service Provider On-Site	Management provides space to service provider to carry out their mission. Space may be provided through a commercial lease or by making space available at no cost to the service provider.	**+** Residents and management gain from the presence of the service provider without having to necessarily pay for that service. ▪ Management has limited control other than breaking the lease agreement. ▪ The mission of the service provider should be compatible to the needs of the residents. ▪ If the service provider usually only targets a specific subset of the population, they must be willing to expand their vision and serve all residents equally. ▪ Service to the larger community must take into consideration such issues as: non-resident access to facilities and parking; balancing services to residents and non-residents; tax credit implications.

Roles and Responsibilities

At the core of service-enriched housing are people: residents, managers, service staff, owners, and developers. Each of these groups of individuals plays an important role in the provision of services for residents. The success of any program relies on the ability of these groups to fulfill their individual responsibilities and work collaboratively.

Whether services are provided by employees of the management company, via contract with a community-based organization, or through co-location of services, a cooperative attitude and recognition of clearly defined roles and responsibilities are crucial. The success of service-enriched housing, therefore, hinges upon relationships, particularly the relationship between the property manager and service provider. The job-specific and shared responsibilities of the property manager and service provider are outlined below:

Property Manager and Service Provider - Division of Labor[1]

Property Manager	Shared Responsibilities	Service Provider
• Rent collection	• Support resident council	• Crisis intervention
• General maintenance	• Support each other	• Needs assessment
• Security	• Coordinate activities	• Resource and referral
• Compliance monitoring	• General troubleshooting	• On-site programs
• Maintain resident files	• Health and safety issues	• Community liaison
• Referrals to service provider		

The existence of a supportive services program enables the site manager to focus on his or her primary responsibility – effectively managing the development. On-site services provide management with an option to delegate resident concerns to the service provider. The service provider must be concerned with programming and services for residents, and with how that service impacts management. A coordinated effort between the site manager and the service provider will result in an improved program of services for residents and a more efficient and well-run property.

Team Work: Manager and Service Coordinator

The work of the service coordinator and manager should complement each other. It is important that both parties have open communication and regularly update each other. Refer to the sample Referral to Service Coordinator form that provides an effective means of communication between the service coordinator, management, and maintenance staff.

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[1] Page 48. Tull, Tanya. 1998. Service-Enriched Housing: Models and Methodologies. Beyond Shelter. Los Angeles, CA.

Successful management teams:

- Have a mutual respect for each other.
- Actively listen and learn from each other.
- See the benefits of all roles.
- Provide the essential tools for each team member to do their job well.
- Support confidentiality.

HOW THE SETTING AFFECTS SERVICES
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The approach to organizing, planning and executing resident services is different in a scattered site setting from providing resident services in a single building or clustered setting.

Scattered Sites

In scattered site housing, residents do not have the same access to the Service Coordinator – who may have a single office at one property, or who circulates among offices at different properties. Issues, and even the culture of the community, may be very different from one building to another. Service Coordinator may need to plan travel time into their schedules.

Typically, Service Coordinators have more autonomy and less oversight in scattered site housing. Good organization, communication and time management skills are essential for Service Coordinators in this situation. Telephone and email can be important secondary means of communication with residents. Providing some activities that are site specific and some that are community-wide helps maximize the Service Coordinator's availability to residents who are dispersed geographically. Finding key residents at each building will help disseminate information about programs, services and activities as well as help foster a sense of community.

Rural/Urban Sites

Providing services is different in rural areas from urban and suburban locales. In general, urban areas have a larger service network (although concentration of population and poverty may overwhelm the service agencies and create a backlog). In rural housing, informal networks are very important – family, school, religious community, neighbors, etc. – to augment services that may not be available. Clustering services and finding individuals who might provide fee for service tasks, such as grocery shopping or housekeeping, can help bridge the gap in rural areas or in urban areas where agencies have waitlists.

 Adapted from, Massachusetts Housing Finance Agency, Resident Service Coordinator's Handbook

Community Resources

It is unlikely that management or the service provider will have the capacity to meet all the needs of residents without utilizing the services and resources of community-based organizations. Therefore, management must know what resources are available in the community before committing to a plan of services.

Just as the resident survey makes known the demand for services, a community assessment is necessary to inventory the resources and services present, their availability, and barriers to accessing them. The Working with Partners in the Community document contains a partial listing of community-based organizations and services. A sample of information that should be collected from each is included in the Partners in the Local Community form. This form may be a useful tool to generate a local inventory of available resources, including information on costs, eligibility requirements, service limitations, waiting lists, and conditions that must be met in order to access the service. Refer to sample form Partners In the Local Community located under Sample Documents and Forms.

Working with Partners in the Community

Basic Community Resources[2]	
Community Services, Programs and Activities	
Local Businesses	**Educational & Employment Programs**
- Grocery stores - Thrift stores - Discount stores - Restaurants - Banks - Utility Providers	- Adult school, GED Classes - Colleges and universities - English as a second language (ESL) - Adult Literacy programs - Employment preparation and job placement Computer Skills Training
Government Services	**Health Care Services**
- City and County departments - Education and employment opportunities - Local libraries and museums - Parks and recreational services - Transportation - Utilities - Police department	- Local hospitals, medical clinics, and pharmacies - Community health clinics - Home Health Agencies, Visiting Nurses Associations - Drug and alcohol rehabilitation - Mental health clinics and counseling services - Adult day care centers - Doctors (podiatry & others)
Social Service Organizations	**Neighborhood Associations**
- Area Agencies on Aging - Senior Centers - Home-delivered meals programs - Food pantries - Financial Counseling Services - Domestic Violence Crisis Centers - Housing information and advocacy - Immigration advocacy	- Churches and Temples - Private organized clubs, leagues, and service organizations - Blockwatch Programs

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[2] Adapted from Page 120. Tull, Tanya. 1998. Beyond Shelter: Service-Enriched Housing. Los Angeles, CA.

• Legal services and advocacy • Community Action Agencies	

Developing a Service Plan

The service plan delineates program goals and expected outcomes, services to be provided or paid for by management, services to be accessed from community-based organizations, and the staffing and budgetary requirements to implement such a plan. Strategies for developing a service plan differ slightly if the housing development is just in the planning stages or if it is currently occupied with residents. For an occupied development, service plans should be revised and updated at least every three years. However, they may be revised and submitted to the Agency for approval as often as warranted by changing site conditions.

The site service plan consists of the following components:

1. Description of Population and Resident Needs and Interests

a. Describe the existing population in terms of age, frailty, gender, income status, household make-up, use of existing services, and other pertinent factors. Include significant resident resources that may be drawn upon in the plan of services.

b. Summarize and prioritize the findings of the resident survey. Include a copy of the assessment or survey form and include the date administered, rate of participation by residents, and responses to the survey questions.

2. Inventory of Services and Resources in the Community

This inventory should go beyond a simple resource directory of community-based organizations. Information on waiting lists, costs, eligibility requirements, and service limitations should be included along with the name, email addresses and telephone number of a contact person. This additional information will determine whether or not services available in the community can meet the needs of residents.

3. Goals/Expected Outcomes

a. Identify existing property management issues that may be positively impacted by the provision of services.

b. Describe the specific goals of the supportive services program and how they relate to the needs/desires of residents.

    i. General occupancy developments should include goals to:

        o Stabilize occupancy by improving residents' ability to uphold their lease obligations.

        o Enhance quality of life through programs for employment, education, and income/asset building, child and youth development, community building, and improving access to services.

        o Improve building and unit maintenance.

    ii. Senior developments should include goals to:

        o Stabilize occupancy by improving residents' ability to uphold the lease throughout the aging process through improved access to health and other services.

- Enhance quality of life through community building, socialization, and other programs.

  iii. Developments for populations with special needs should identify relevant goals based on the strengths and needs of the targeted population.

  c. Link expected outcomes to each goal and identify how impact/success will be measured or determined.

  d. Describe how the program will identify and respond to the changing needs of residents over time (e.g. through regularly scheduled resident meetings, needs assessments, surveys, focus groups, etc.).

4. **Implementation of services, programs, and activities**

   Describe the proposed actions that will address existing needs for services.

   a. Identify the activity(ies), program(s), or service(s) that will be implemented over the next three years to address resident issues. Identify:

   - The party responsible for providing each service and a timeline for implementation.

   - How and where the service will be provided.

   - The frequency of the program or activity (daily, weekly, monthly, etc.).

   - Eligibility requirements for resident participation. Ideally all residents will be eligible for all services.

   b. Describe the service provider's methods to encourage resident participation.

5. **Staffing**

   Define staffing needs to implement the service plan. Include a job title and description, supervision, qualifications, and support (e.g. office space, computer with Internet/e-mail access). Agency recommends a minimum of 1 hour/week for every 5 units.

6. **Budget**

   Identify annual expenses and income related to the service. Indicate sources of funding for the program, including co-payments, external funds, reserves, operational dollars, residual receipts or escrowed funds.
   Refer to the sample Service Plan template for developing a service plan for an existing housing development located under Sample Documents and Forms.

Hiring a Service Coordinator[3]

1. **General Duties of a Service Coordinator**
   A service coordinator links residents within the housing development to services and information provided by public agencies or other community based organizations. The service coordinator may assess service needs, determine eligibility for public services, and provide assistance in accessing services for all residents.

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[3] Adapted from HUD….Management Handbook 4381.5 REVISION-2, CHANGE-2, Chapter 8.

The service coordinator's main focus should not be recreational programming and activities. However, such activities are important tools to help establish relationships between the service coordinator and the residents.

A key responsibility of the service coordinator at a family site is to assure that there is sufficient on site programming for children and youth. These activities prevent potential behavioral problems by youth on site and help to establish relationships between the service coordinator and the residents.

The service coordinator also is essential in property management's efforts to prevent or address problems such as rental delinquency, destruction of property, criminal activity, and general health and safety concerns. The service coordinator should not be expected to perform administrative work normally associated with management functions of the property, such as rent collection. Refer to sample job description for a Service Coordinator at a Senior or Family Development under Sample Forms and Documents.

2. **Qualifications of a Service Coordinator at a Senior Development**

- A Bachelor degree in Social Work or a degree in Gerontology, Psychology, or Counseling is preferable; a college degree is fully acceptable. However, individuals without a degree, but with appropriate work experience may be hired.

- Certificate in Elder Service Coordination awarded by PHFA in collaboration with California University of PA Rural Communities Institute

- Master of Social Work may be required in situations in which Resident Service Coordinator supervises social work students, interns, non-professionals, or paraprofessionals

- Training in the aging process, elder services, disability services, eligibility for and procedures of Federal and applicable State entitlement programs, legal liability issues relating to providing service coordination, normal and pathological aging processes, intervention techniques, and housing policies.

- Two to three years experience in social service delivery with senior citizens and younger persons with disabilities. Some supervisory and management experience may be desirable.

- Demonstrated working knowledge of supportive services and other resources for senior citizens and persons with disabilities in the geographic area.

- Demonstrated ability to advocate, organize, problem-solve, and provide results for the population served.

Qualifications of a Service Coordinator at a Family Development

- A Bachelor degree in Social Work or a degree in Psychology, Counseling, Family Development, or related degree is preferable; a college degree is fully acceptable. A combination of education and experience that results in knowledge of the human services system is essential.

- Training in services and development across the life span, disability services, eligibility for and procedures of Federal and applicable State entitlement

programs, legal liability issues relating to providing service coordination, intervention techniques, and housing policies.

- Two to three years experience in social service delivery with children and families, senior citizens and younger persons with disabilities. Some supervisory and management experience may be desirable.

- Demonstrated working knowledge of supportive services and other resources for children and families, senior citizens, and persons with disabilities in the geographic area.

- Demonstrated ability to advocate, organize, problem-solve, and provide results for the population served.