

Coordinating Property Management and Social Services in Supportive Housing

participant materials
supportive housing training series



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Participant Materials

Developed by Center for Urban Community Services

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Coordinating Property Management and Social Services in Supportive Housing is part of the Supportive Housing Training Series. This training series currently includes eleven curricula providing best practices and guidance on supportive housing development, operation and services.

The full series is available for downloading from the Department of Housing and Urban Development website.

For more information:

U.S. Department of Housing and Urban Development: www.hud.gov

Center for Urban Community Services: www.cucs.org

Corporation for Supportive Housing: www.csh.org

AGENDA

I. INTRODUCTION

- A. Rationale for the Training
- B. Go Round

II. SINGLE PROVIDER VS. PARTNERSHIP MODEL

III. THE DEVELOPMENT PHASE: CREATING A PARTNERSHIP

- A. Considerations in Choosing a Partner
- B. The Process of Creating a Partnership

IV. DIFFERENTIATING PROPERTY MANAGEMENT AND SOCIAL SERVICES

- A. Goals of Each Partner and Areas of Tension or Potential Conflict
- B. Differentiating Roles and Responsibilities
- C. Areas Requiring Shared Decision-Making

V. IDENTIFYING COMMON PITFALLS IN THE RELATIONSHIP

- A. Expectations
- B. Communication
- C. Collaboration

ORGANIZATIONAL STRUCTURES

SINGLE PROVIDER — In this model, one organization provides both social services and property management with distinctions drawn between functions.

PARTNERSHIP — In this model, two organizations partner with one another for the provision of either property management or social services depending on expertise.

ADVANTAGES OF A SINGLE PROVIDER MODEL

- There is less interagency compromise and one organization retains overall control of the project.
- There are fewer ideological conflicts regarding mission, vision and program goals.
- Decision-making, chain of command and ultimate authority is more likely to be clear.
- Time is saved if you don't have to structure a long-term collaborative effort with another agency and coordinate day-to-day operations.
- Communication is simplified; principles of confidentiality are less confusing.
- There is a "double bottom line" for services and property management. The organization will be monitoring both the physical plant and the financial viability of the project as well as the quality of the supportive services. One will be less likely to take precedence over the other.

ADVANTAGES OF A PARTNERSHIP MODEL

- Potential conflicts that occur when one organization (and perhaps the same person) acts as both service provider and landlord. For example, a tenant will likely refrain from disclosing potentially damaging information to their case manager if s/he recognizes that this person reports to or is management.
- It is unusual for one agency to have adequate capacity and experience in the provision of both property management and services, and a great deal of time (and money) may be lost to developing this expertise through training and trial and error. Even if the organization hires people with this capacity, they may not be able to assess and/or monitor the quality of their work.
- Collaborating with another agency can bring fresh ideas, talents and new resources to the project.
- Creative solutions often arise out of the tensions and conflicts that are natural with collaborative efforts.
- From the tenant's point of view, housing is more generic and less institutional when a housing provider, not a service provider, operates housing.

PARTNER SELECTION CRITERIA

The Organization's Mission and Goals

- What do you think the goals of this program should be?
- What populations are you interested in serving and why (e.g., singles, families, people with special needs)?

The Organization's Values and Philosophy

- Does your agency have an approach to services in supportive housing?
- What motivates your agency to be involved in this project?

The Organization's Experience with Similar Projects

- How much experience does your organization have with projects of this type?
- What experience do you have working with a partner?

The Organization's Expectations for Tenant Behavior

- What kinds of behavior from residents will be unacceptable to you? (e.g., alcohol use, drug use, poor personal hygiene, noise disturbances)
- What will you expect from residents and what should they expect from you?
- How have you or do you plan to involve tenants in activities?
- What should the eviction criteria be?

The Organization's Management Style/Organizational Culture

- Describe your staff team (include staffing pattern, expertise, scheduled hours, supervisory hierarchy).
- What decisions do you think should be made jointly between property management and social service teams?
- How does your agency handle conflicts in working relationships?
- How do you propose to handle client information sharing between your agency and staff from other agencies, including your partner?

The Organization's Vision for Collaboration

- What kinds of issues do you think your partner agency should be responsible for (address primary responsibility during rent-up, house rules enforcement, evictions, staff hiring, etc.)?

Partnership Exercise: Issues to Consider in Selecting a Partner Organization

For organizations thinking about “partnering” to operate supportive housing, it is useful to have a series of preliminary meetings to discuss some or all of the following questions:

- ◆ Why does your agency want to be involved in supportive housing?
- ◆ What are the reasons you want/need to partner with another organization?
- ◆ How much experience does your organization have in residential services? What about with people with disabilities and people who have been homeless?
- ◆ What do you think the goals of this supportive housing program should be?
- ◆ What populations are you interested in serving in this housing? (e.g., singles, families, people with mental illness, older adults, physically disabled, people in recovery from substance use, people actively using, etc.) Would you rather develop a residence for a single population or mixed populations?
- ◆ What are your expectations for residents? (e.g., work, community service in the residence, being a good tenant, etc.)
- ◆ What kinds of behavior from residents will be unacceptable to you? (e.g., alcohol use, drug use, bizarre dress, poor personal hygiene, people talking to themselves, etc.)
- ◆ How do you feel about residents’ having overnight guests? What about pets?
- ◆ Do you think sexual activity between residents should be prohibited?
- ◆ What should the criteria for eviction be?
- ◆ What kinds of problems should supportive service staff handle?
- ◆ Do you have supervision in your organization? What about staff meetings?
- ◆ How does your agency handle conflict in working relationships?
- ◆ Should we have another conversation about partnering or should we end it now?

THE PROCESS FOR CREATING A PARTNERSHIP

- **Research and identify potential partners.**
- **Send a Request for Proposals (RFP)** to a short, pre-screened list of qualified and interested providers who have been identified through interview and recommendations.
- **Arrange a meeting to discuss selection criteria with respondents to the RFP.**
- **Visit each other's sites and offices.**
- **Arrange a series of meetings to further explore compatibility.**
- **Write down agreed upon concrete project goals that balance the interests of the parties.**
- **Work on preliminary project tasks together**, such as creating a project-specific organizational chart, house rules, resident handbook, etc.
- **Solidify the agreement.** After you have chosen a partner and agreed to work together, you can draft a letter of intent between your organizations. It should outline the roles of each party, which party will be responsible for various costs and a project timeline. It should also contain information about terminating the agreement if either party fails to perform their responsibilities. Later in the process, a more formal agreement, or Memoranda of Understanding, can be executed. This will clarify specific roles, responsibilities and relationships between the parties.
- **Invest in mutual cross-training.** Two subjects which invariably come up include how to share information and principles of confidentiality and special needs training for building staff.

SUPPORTIVE HOUSING PROJECT DESIGN: PROGRAM GOAL CONSIDERATIONS

Developing program goals and a philosophy of service delivery are key steps in the design of a successful supportive housing program. Program goals provide a focus for the work and drive every aspect of program design, including the staff hired, the residents accepted, and the services offered. Goals should be discussed and understood by all staff and compatible with the overall agency mission.

❖ THE PURPOSE OF COMBINING SERVICES WITH HOUSING

Services are generally offered to help people meet the obligations of tenancy so that they may permanently live in safe, affordable housing.

More specific goals commonly referred to by providers include:

- To Assist in Increasing Residents' Skills
- To Improve Residents' Health
- To Increase Residents' Stability
- To Increase Residents' Income
- To Increase Residents' Socialization Opportunities
- To Assist in Beginning or Maintaining Recovery from Chemical Addictions
- To Reduce the Symptoms Associated with Mental Illness
- To Increase Access to, and Use of, Community Based Services
- To Reunite Families

❖ CONDITIONS OF RESIDENCY AND PROJECT GOALS

Consideration should be given to the following conditions of residency in keeping with the proposed project goals.

- Sobriety Requirements
- Lease Agreement
- Length of Stay (permanent, transitional, restrictions)
- Sharing of Units
- Tenant Involvement
- Participation in Services

❖ TRANSLATING GOALS INTO SERVICES

A crucial aspect of program goal development involves discussing goals in terms of the day-to-day services that will be offered. The example below illustrates how an agreed upon goal might be interpreted differently.

- **Goal:** *We will provide services that will help each resident reach his/her maximum level of independence.*

Interpretation A: *We will avoid services that infantilize tenants. These include things like helping people get to appointments, managing medications, knocking on doors to check on people we haven't seen in a while. If people want services, they'll come to us.*

Interpretation B: *Some people will not achieve any level of independence or stability without constant support and assistance. Therefore we have an obligation to provide those services if we are to meet our goal.*

Property Management and Supportive Services Roles & Responsibilities: Areas of Overlap

The following responsibilities are generally shared by both the social service and property management staff in supportive housing programs. It is important to keep lines of communication open when discussing these areas of overlap, and staff should be educated regarding issues of confidentiality.

Intake: Tenant Selection and Interviewing

- ❑ Service Interview — focus on service history and current needs
- ❑ Management Interview — focus on ability to pay rent and meet obligations of tenancy
- ❑ Tenant Interview — focus on characteristics of a good neighbor
- ❑ Common Concerns: Who makes the final decision? How much information can be shared from the service interview?

Orientation of Incoming Tenants

- ❑ Services can help tenants with concrete needs around the move, such as unpacking, getting familiar with the building routine, location of laundry, neighborhood resources, staff locations and responsibilities.
- ❑ Management orients tenants about building maintenance issues, fire drills, tenant meetings.

Rent Payment and Arrears

- ❑ Services can provide tenants with assistance in paying their rent (budgeting, addressing cost of substance abuse, vocational services).
- ❑ Management is usually responsible for collecting rent and addressing issues of rent arrears.
- ❑ Services and property management need to meet regularly to discuss plans for complementing each other's roles in dealing with rent arrears problems.

Dealing with Nuisance and Disruptive Behaviors

- ❑ House rules are generally developed jointly by Management and Services. Staff may develop some basic rules and tenant input can be solicited to add or revise these. All staff can help promote healthy cultural norms for the building; it is frequently service staff who help to structure these efforts.
- ❑ Property management's role is generally to issue warnings and notices of violations; services can try to help the tenant correct the problem. Other tenants are also important to involve in creating a safe and enjoyable living environment.

Procedures in Crises (e.g., psychiatric, medical, physical or fire)

- ❑ Clear policies and procedures should be in place for dealing with disruptions. These should clearly spell out the chain of command in case of emergency, what information to provide to EMS, when to beep staff on call, what information to record and how.

Tenant Grievance Procedures

- ❑ Staff and tenants should be aware of systems for evaluating the program and the services given. Management and Service staff generally work on this together, with service staff informing tenants about procedures through individual case management meetings or tenant meetings.

Community Building

- ❑ Many issues mentioned above involve aspects of community building. The tenants, as well as management and service staffs, are members of the building community and influence the culture of the community.
- ❑ Staff should be aware of trends in the community and plan strategies for positively influencing the culture.

Dealing with Health and Safety Issues

- ❑ Management may want to conduct regular room inspections together with services.
- ❑ Services can teach ADL skills to tenants, such as practicing good hygiene habits, cooking and cleaning skills, etc.
- ❑ Services can assist with obtaining home health services if indicated due to inability to maintain health and safety standards.

PRINCIPLES OF CONFIDENTIALITY

The purpose of maintaining tenants' confidentiality is to:

- ❑ Protect tenants' right to privacy.
- ❑ Protect tenants from information being disclosed, which could potentially be used against them.
- ❑ Encourage tenants to establish trusting relationships with staff.
- ❑ Protect other tenants in the community from becoming overwhelmed by too much information.

All staff should facilitate a community that values and upholds the individual's right to privacy by regularly reinforcing the importance of maintaining one another's confidentiality.

Information about a tenant should be shared with other staff members within your organization if it is required for them to do their jobs; namely, to protect a tenant's safety or to enhance their well-being.

What is confidentiality for Service Staff?

Based on the Social Work Code of Ethics:

- ❑ Social workers should respect the privacy of clients and hold in confidence all information *obtained in the course of professional service* (sessions, charting, through collateral sources, etc.).
- ❑ Social workers should share with others confidences revealed by clients without their consent only for compelling reasons.
- ❑ Social workers should inform clients about the limits of confidentiality in a given situation.
- ❑ Social workers should afford clients reasonable access to any official social work records concerning them (Freedom of Information Act).

What is not considered confidential?

- ❑ Observable, public behavior.
- ❑ Information obtained not in the course of professional service (hearsay, casual conversation).

**MAINTAINING COMMUNICATION BETWEEN
PROPERTY MANAGEMENT AND SOCIAL SERVICES**

- ❑ Orient each discipline early on to each other's role
- ❑ Maintain a log/communications book between security/front desk staff and services
- ❑ Schedule regular meetings between the director of property management and the director of social services to review key issues in the relationship, address policies and procedures and resolve conflicts between staff
- ❑ Ensure there is a clear decision-making process (what will be decided by team leaders, by consensus, by democratic process?) and clear lines of authority within and between property management and social services
- ❑ Schedule joint staff meetings
- ❑ Appoint an incident-review committee
- ❑ Provide team-building retreats
- ❑ Provide joint trainings on such topics as: confidentiality, understanding special needs populations, substance abuse, etc.

CASE STUDIES
Property Management/Social Services Coordination

Questions for Discussion:

- ❑ **How should this situation be handled?**
- ❑ **What is building management's role? What is social services' role?**
- ❑ **Where is there confusion or disagreement about what to do or who should do it?**

1. A caseworker visits a tenant in her room. She has been difficult to engage and the caseworker is pleased to be invited in. The worker finds a room that is piled with stuff leaving only a narrow path to her bed. The tenant tells the worker that she is working on a project that will make her very rich and asks the worker not to tell management about all the stuff in her room.

2. A tenant has been the source of numerous complaints from his neighbors, mostly for noise. He is behind on his rent. The service team has been trying to work with him, but he has refused all assistance.

The tenant receives an eviction notice and he goes in to talk to the management team. He states that he got mugged and then missed his entitlements appointment, which is why he is behind on his rent. He tells the manager that he wants to pay his rent and remain a tenant, but he just has bad luck. He says he has tried discussing these things with service staff, but they are not helpful.

3. A tenant has Dementia. He has been putting the stove on and leaving his room. The super comes to social services and tells them this situation is an emergency and something must be done immediately.

4. A frail, elderly man is beginning to decompensate and has been screaming in the night. Social services has been working with his doctors to adjust his medications, and his behavior does not yet warrant hospitalization. His neighbors are complaining, and they are angry at both management and services for not doing anything about their complaints.

5. A tenant accidentally cuts himself and leaves blood in the hallway. While social services is dealing with the tenant, the maintenance man cleans up the blood. Later, another tenant tells the maintenance man "that was probably AIDS blood." The maintenance man goes to social services demanding to know whether or not the tenant has AIDS.

6. In the middle of the night one of the tenants comes downstairs and tells security staff that he's "had it" and won't be seen after tonight.

7. One of the tenants has just died. How is this dealt with in your building?

8. A tenant is having problems with the heat in his apartment. He filed a work order yesterday and has not had a response. The tenant complains to social services and demands that something be done.

PROPERTY MANAGEMENT AND SOCIAL SERVICES COLLABORATION BIBLIOGRAPHY

The American Affordable Housing Institute: "Building Capacity: Nonprofit/For-Profit Development Ventures." Rutgers University, 1993

This report presents survey and case study findings on collaborative relationships between nonprofit housing developers and for-profit builders/developers. It contains information on how to strategically plan, perform organizational assessments and determine alternative strategies for developing housing.

Amherst H Wilder Foundation: "Collaboration: What Makes it Work." Amherst H. Wilder Foundation, 1992

This report offers a detailed review of 19 factors that influence successful collaborations and discusses their implications for new and existing collaborative relationships.

The Association for the Help of Retarded Children et al: "Developing Generic Long Term Residential Solutions." The Association for the Help of Retarded Children, New York City, and the Center for Urban Community Services, Supportive Housing for Individuals with Disabilities, 2000

This manual provides general information about the development of supportive housing. It includes a section on operational issues that outlines property management and social services functions.

Community Development Research Center: "Confronting the Management Challenge: Affordable Housing in the Nonprofit Sector," 1994

This report is built upon research of 17 nonprofit housing development organizations and 34 developments. It explores alternative approaches employed by nonprofit operators in managing a "dual bottom line" of social concern and financial reality.

Hord, S.: "A Synthesis of Research on Organizational Collaboration." *Educational Leadership Journal*, 22-26, 1986

Distinguishing between collaboration and cooperation provides this author with a structure for exploring the literature and for arriving at a stronger delineation of the terms. The author examined concepts of individual, organizational and inter-organizational behavior to gain a scholarly perspective on groups and individuals working together.

Reynolds, S.: "Not a Solo Act: Creating Successful Partnerships to Develop & Operate Supportive Housing." Corporation for Supportive Housing, 1997

This manual was created to facilitate successful collaborations between two or more lead organizations in order to efficiently and effectively fill the many roles required to develop and maintain successful supportive residences. It is aimed at maximizing each "partner's" strengths and minimizing problems that can arise in planning, development and operations.

Soler, M., Peters, C.: "Who Should Know What? Confidentiality and Information Sharing in Service Integration." National Center for Service Integration, NY, 1993

This resource brief proposes that confidentiality need not be a significant impediment to interagency collaboration. Based on successful work in a number of states and communities, several mechanisms exist for effective interagency information sharing that balance the interests of clients and staff. The brief does not aim to be a comprehensive analysis of confidentiality mandates.

Technical Assistance Collaborative: "Fitting the Pieces Together: Coordinating Housing Services." Technical Assistance Collaborative, Boston, MA, 1994

This article looks at the relationship between the owner, manager and social service providers in supportive residences. Specific responsibilities and roles are outlined including tenant selection, lease compliance, rights of tenancy and consumer choice.

Winer, M., Ray, K.: "Collaboration Handbook: Creating, Sustaining, and Enjoying the Journey." Amherst H. Wilder Foundation, 1994

This workbook provides a framework for understanding the stages of the collaborative process. It includes worksheets and exercises for the challenges that may emerge at each stage.

Internet Sites:

Center for Urban Community Services

<http://www.cucs.org>

Center for Urban Community Services (CUCS) provides a continuum of supportive services for homeless and formerly homeless people, including street outreach, a drop-in center, transitional and permanent housing programs, and vocational and educational programs. Particular emphasis is placed on specialized services for people with mental illness, HIV/AIDS and chemical dependency. This website provides information and links to a variety of resources regarding transitional and permanent housing.

Corporation for Supportive Housing

<http://www.csh.org>

CSH's mission is to help communities create permanent housing with services to prevent and end homelessness. CSH works through collaborations with private, nonprofit and government partners, and strives to address the needs of tenants of supportive housing. CSH's website includes a Resource Library with downloadable reports, studies, guides and manuals aimed at developing new and better supportive housing; policy and advocacy updates; and a calendar of events.

National Alliance to End Homelessness (NAEH)

<http://www.naeh.org>

The National Alliance to End Homelessness (NAEH), a nationwide federation of public, private and nonprofit organizations, demonstrates that homelessness can be ended. NAEH offers key facts on homelessness, affordable housing, roots of homelessness, best practice and profiles, publications and resources, fact sheets and comprehensive links to national organizations and government agencies that address homelessness.

National Resource Center on Homelessness and Mental Illness

<http://www.prainc.com/nrc/>

The National Resource Center on Homelessness and Mental Illness provides technical assistance, identifies and synthesizes knowledge and disseminates information. Users can be linked to findings from Federal demonstration and Knowledge Development and Application (KDA) projects, research on homelessness and mental illness, and information on federal projects.

Wilder Foundation

<http://www.wilder.org>

This website offers practical guidance for nonprofit agencies, including information on affordable housing, collaborating with partners, and community building. Publications can be ordered for a fee, with some available to download for free. There are helpful links to other sites.