Excerpted from HUD's <u>Management Agent Handbook</u> 4381.5 REV-2, CHG-2

 8.9 TRAINING GUIDELINES FOR SERVICE COORDINATORS

a. General. This Section provides guidance for training of service coordinators working in HUD-assisted projects serving residents who are elderly or have disabilities, including those funded under the Congregate Housing Services Program (CHSP). It also provides guidance for multifamily properties serving families and the On-Line Service Coordinator (OLSC).

  While the statute mandates training requirements for coordinators in housing serving elderly or residents with disabilities, it does not mandate training in projects serving families or the OLSC. In the case of HUD-assisted projects serving families, owner/agents must follow guidance in chapter six ("Training Costs for Front Line Staff"), prior, and Subparagraph 8(f), page 8-28, below, which provides suggested training areas for family projects with service coordinators.

  The training guidelines enhance the service coordinator's current level of knowledge and skills which will improve his/her effectiveness in working with residents. The guidelines offer a general framework for developing training programs to meet the needs of service coordinators; they also allow flexibility in training design and delivery by vendors outside the Department.

b. Authority. Statutory authority for training guidelines for service coordinators serving projects for the elderly or people with disabilities is found in Sections 671 and 672 of the Housing and Community Development Act Amendments of 1992 (HCDA) (41 USC 8011). Section 671 requires training for service coordinators serving projects for the elderly or people with disabilities. Section 672 of the HCDA states the minimum requirements as: "Such qualifications and standards shall include requiring each service coordinator to be trained in the aging process, elder services, disability services, eligibility for and procedures of Federal and applicable State entitlement programs and legal liability issues relating to providing service coordination, drug and alcohol use and abuse by the elderly and mental health issues."

  Training for service coordinators for families and the OLSCs are not a statutory requirement.

c. Implementation - Projects With Service Coordinators Serving The Elderly Or People With Disabilities.

  1. Eligibility. Training for service coordinators qualifies as an eligible project expense if the proposed training relates to the guidelines herein, i.e., to enhance the service coordinator's knowledge and skills in the identified subject areas. Associated costs of the training activity (including travel and lodging) considered reasonable and customary in accordance with HUD travel requirements are also allowable.

2. Minimum Training Requirements. All service coordinators serving the elderly and people with disabilities must have met a minimum of 36 training hours of classroom/seminar time before hiring, OR will complete these minimum training requirements within 12 months of initial hiring.

   The 36 hours MUST, cover ALL nine of the following subject areas:

   The first seven of these are statutory:

   - The Aging Process - see subparagraph 8.8 (d) (5) (a).

   Note 1: Group Homes and Independent Living Complexes serving non-elderly residents with disabilities need only address this issue as necessary and consistent with their resident population.

   - Elder Services - see subparagraph 8.8(d)(1)(a).

   Note 2: See Note 1, above.

   - Disability Services - see subparagraphs 8.8(d)(1)(b) and 8.8(5)(d). Federal and Applicable State Entitlement Programs covering both the elderly and people with disabilities - see subparagraphs 8.8(d)(2)(a) and (b).

   - Legal Liability Issues Relating to Providing Service Coordination – see subparagraphs 8.8(d)(2)(c) and (d).

   - Medication/Substance Abuse - see subparagraph 8.8(d)(5)(b)

   - Mental Health Issues see subparagraphs 8.8 (d)(5)(c) and (e)

   The last two are additional areas considered critically important for service coordinators serving the elderly or people with disabilities.

   - Strategies for Communicating Effectively in Difficult Situations - see subparagraph 8.8(d)(4)(a).

   - Strategies for Dealing with Cognitive Impairments - see subparagraphs 8.8(d)(5)(e).

   Service Coordinators must meet the statutory requirements before requesting approval for additional training in other core subject areas.

1. Continuing Education. After completion of statutory training requirements, all service coordinators serving the elderly or people with disabilities should attend

at least 12 hours of training annually. Continuing education is necessary in order to be an effective professional. At a minimum, service coordinators must remain current on changing statutes at all levels and current practices in aging and/or disability issues.

2. Documentation. Project managers must document conformance with training requirements by listing the subject matter, length of time of the course covered (e.g., 6 hours), sponsoring organization, date(s) and cost. Such information must be available to HUD staff on management reviews of the project site, if requested (see subparagraph 8.8(e)).

d. General - Guidelines - Service Coordinators Serving Projects With Elderly Or People With Disabilities. There are five categories, or "core areas" of service coordinator training: The Professional Service Coordinator; Government Programs and (Legal) Requirements; Community Relations; Communications; and, Current Issues.

Each core area encompasses a broad array of related skills, knowledge and abilities in which training can be provided. Also, each core area can be broken down into "skills areas," from which a training course, seminar, symposium, etc. can be tailored. While training can be developed based on one or a combination of the skills areas, the method of presentation and exact content of training material is up to the training provider or vendor.

Additionally, project management is encouraged to provide an orientation regarding general project management functions to the coordinator (see subparagraph 8(d)(6), following).

NOTE 3: The areas listed below that have an asterisk (*) denote those in which there are statutory minimum requirements for service coordinators serving elderly/ disabled populations, as discussed under subparagraph 8 (c) (2) .

The Office of Housing encourages the involvement of other members of the property management team in service coordinator training as appropriate and necessary to that specific property. The more service coordinators and other members of the property management teams understand each others roles, functions and responsibilities, the smoother the operation of the project. Training may be approved as an eligible project expense in the following areas:

1. The Professional Service Coordinator.

This core area addresses the concept of service coordination, the role of the service coordinator in relation to the residents of the community and the other staff of the property, and administrative aspects of service coordination. It also focuses on the resident population being served, specifically addressing and meeting their needs through supportive service provision. Eligible training includes:

The following statutory subjects:

a. Supportive Services for the Aging/Elder Services *

The network and array of services available to the senior community for independent/assisted living.

Note 4:   See Note 1, page 8-18, prior.

b. Supportive Service Needs of Non-Elderly People with Disabilities *

The network and array of services available to people with disabilities for independent/assisted living.

The following subjects are optional:

c. Role of Service Coordinator

The purpose, responsibilities and functions of the service coordinator.

d. Identifying Service Needs and Availability

The methodology for identifying needs of residents and service availability to meet those needs including case management and consumer research techniques; may involve cultural diversity issues.

e. Monitoring and Evaluating Services, Effectiveness, Adequacy and Need for Changes

The maintenance of established services plans (also known as case plans or care plans) and how to evaluate their effectiveness, adequacy and need for changes.

f. Networking

The process of establishing linkages with service providers and tapping resources to enhance service provision.

g. Creative Strategies in Service Provision

The examination of alternatives to traditional approaches in service provision.

h. Ethics/Confidentiality

Ethical considerations in performing the service coordinator job with sensitivity and professionalism.

i. Record keeping, and Reporting

Techniques for keeping organized records and files to achieve service coordinator record keeping and reporting goals; development of useful forms for effective reporting purposes.

2. Government Programs and Legal Requirements. This core area encompasses the knowledge necessary to administer service coordination in accordance with federal, State and local laws and program requirements. Eligible training includes:

The following subjects are statutory:

a. Federal Programs & Requirements *

Federal laws and associated requirements which impact the service coordinator's job, including, but not limited to: The Older Americans Act, Community Services Block Grants, the Fair Housing Act, Section 504 of the Rehabilitation Act, the Americans with Disabilities Act, the Developmental Disabilities Act, and appropriate Civil Rights statutes.

b. State-Administered Programs & Requirements/Entitlement Programs *

State-specific requirements which impact service coordinators, including, e.g., entitlement programs such as State-administered Medicaid or other supportive service programs.

c. Legal Liability *

Issues of legal liability for the service coordinator.

The following subjects are optional:

d. HUD's Service Coordinator Program

Basic policy and procedures on HUD's Service Coordinator Program.

e. Locally-Administered Programs Requirements.

Local government and other program requirements which impact service coordinators, e.g.; the non-governmental network; geriatric assessment services; availability of locally-funded services (e.g., homemaker, meals-on-wheels, disability counseling); area agencies on aging.

2. Good relations between and among residents, staff, and the broader Community Relations. This core area addresses skills needed to promote community. The following subjects are optional:

a. Working with Resident Organizations

Strategies to develop and maintain resident interest in fostering community spirit and supporting service provision; may include strategies to address cultural diversity issues within the project.

b. Support Networks for Residents

Identifying the various support networks   available to residents (family, community service programs, other residents, self-advocacy groups, etc.) and ways to enhance those networks.

 c. Peer Networks

Creating one's own network as a service coordinator; effective vehicles for sharing/learning information from one's peers.

 d. Working with Volunteers

Tapping into the local volunteer network; establishing a formal volunteer program.

e. Working with Aides

How to structure an aide or paraprofessional arrangement to assist the service coordinator, and associated supervision needed.

f. Working with Management Agents

Understanding the management agent's role and priorities; techniques on how to work in concert with management agents.

4. Communications. This area focuses on the interpersonal skills needed to establish and maintain a successful service coordination program. Eligible training subjects include:

The following subject is required:

a. Communicating Effectively in Difficult Situations *

Ways to promote conflict resolution, community harmony and positive attitudes; methods to deal with uncooperative or unresponsive individuals receptivity to others, including service providers.

The following subjects are optional:

a. Negotiation/Brokering

Techniques on effective negotiation and bartering for services; identifying resources/assets in exchange for services.

b. Counseling

Skills in counseling residents and families; effective listening to facilitate problem-solving. May involve dealing with cultural diversity issues.

d. Advocacy

Effective ways to be an advocate for the resident population and service coordination.

e. Teamwork/Consensus-Building

Group dynamics skills in achieving consensus, teambuilding.

f. Motivation

Strategies in helping residents to realize they can make their own choices and take effective action. May involve cultural diversity issues.

g. Outreach Strategies

Effective ways to tap resources (residents, services, funds) to market your service coordination efforts.

5. Current Issues. This core area addresses issues and problems in serving residents, who are elderly or people who have disabilities, in HUD projects as they operate in contemporary society. Eligible training includes:

The following subjects are statutory:

a. An Aging Population/Aging Process *

The physical, mental and social changes associated with the aging process; the aging of America's population.

Note 5: See Note 1, page 8-18, prior.

b. Medication/Substance Abuse *

The use/abuse of medications, alcohol and any other substance by the elderly or people who have disabilities.

c. Mixed Populations *

The issues confronting service coordinators and managers in serving populations that include both elderly and people with disabilities and methods to work effectively with such populations.

d. The Disabled Population *

Examination of the physical, mental and social changes associated with the aging process for residents who have disabilities; more general examination of the types of disabilities and how to best coordinate service needs.

The following subject is required:

e. Strategies for Dealing with Cognitive Impairments *

The signs and symptoms of mental illness or depression among the elderly and people with disabilities; how to serve populations with Alzheimer's disease, dementia and other forms of cognitive impairment.

The following subjects are optional:

f. Other Health Problems Among the Aging

The common health problems experienced as one ages (e.g. arthritis, osteoporosis/bone fractures).

g. Crime and Self-protection

Common crimes committed against residents who may be elderly or people who have disabilities; how to serve the elderly or people with disabilities in making them aware of crime and how to protect themselves.

h. Death and Loss

Helping the residents who are elderly or who have disabilities in dealing with death of loved one (e.g. spouse, friend, roommate). May involve cultural diversity issues.

i. Living Wills/Trusts

Fundamentals of living wills and establishing trusts; how to introduce these instruments to your residential population.

j. Guardianship/Power of Attorney

Legal fundamentals of working with residents and families to assign power of attorney and guardianships, where appropriate.

k. On-Line Service Coordination

Fundamentals of computers, including distance learning, if appropriate, local computer resources and use of the worldwide web (see Chapter 9, following).

6. Administration/Project Management. This subarea deals with a basic understanding of the property in which the service coordinator operates. The service coordinator needs general understanding, awareness and appreciation of the basics of project management, and should be attuned to issues concerning others on the management staff.

Thus, for the following subjects, appropriate members of the project's or the property management team should provide an orientation sufficient for the service coordinator's needs.

Training costs in the following subject areas are not normally approvable.

a. Resident Selection and Termination

The interviewing/intake process for new residents, the termination process and other related procedures.

b. Occupancy Issues

The examination of occupancy problems/violations and identifying associated service needs (e.g. good neighbor programs). Also, provide a general understanding in plain language and reasonable accommodation practices.

c. Emergency Procedures

The fundamentals of safe crisis handling; fires; CPR; first aid; conduct in different emergency situations.

d. Basics of Finance/Accounting

An introduction to fundamentals of bookkeeping/accounting procedures; essential components of a financial statement; understanding budgeting.

e. State/Area Office Management Review

When doing an on-site management review of projects for the elderly or people with disabilities subject to Handbook 4350.1, Chapter 6, include a check of whether or not there is documentation that the coordinator has met the training requirements or is in the process of receiving appropriate training. Any findings should be written in narrative format as an addendum to Form HUD-9834B, Management Review Questionnaire" and summarized on the Form HUD-9834, "Management Review Report", under Section VI, General Management Practices, which is sent to the project manager.

f. Guidelines - Service Coordinators Serving Family Projects.

There are no minimum training requirements for service coordinators in family projects. The Office of Housing is offering general guidance to assist owners of family projects address training needs of coordinators, as appropriate, either upon hiring or to meet needs which arise during their tenure.

Training for family projects is an eligible project expense under this Handbook; see page 6-32.

The subject areas noted below are EXAMPLES of current issues which may be useful for coordinators working in family projects; they are NOT all-inclusive. Family project owners may use discretion in determining training needs for coordinators. Training areas could include:

    (1)   Single Head of Households - Issues and service needs confronting one-parent families;

    (2)   Spousal Abuse - Signs of spousal abuse; how to deal with it, including coordinating professional help and counseling;

    (3)   Child Abuse - Signs of child abuse and how to deal with such situations coming to light, including facilitating intervention of legal authorities and professional counseling;

    (4)   Child Care - locating and providing child care (e.g. day care) on/off-site;

    (5)   Building Safe Communities - Identifying strategies to increase safety in the project(s) (e.g. public/private partnerships, neighborhood watch groups);

    (6)   Economic Development and Employment Opportunities - Strategies and training associated with developing economic development opportunities for the residents, both on and off-site e.g. small business development, job training programs, how to get and hold a job, etc.);

    (7)   Educational Opportunities - Existing programs (e.g. community colleges, GED Program) enabling residents to set and pursue educational goals;

(8) Drug/Alcohol Abuse - Types of common drugs/alcohol abuse and associated behavioral patterns. Getting emergency support and learning what is the local referral process for professional treatment;

(9) Neighborhood Violence - Exploring causes of violence, including gang violence, and successful ways to combat it;

(10) Youth Services - Approaches for tapping into existing or creating new programs and services for youth (e.g. boys'/girls' clubs, sports clubs, recreation centers) as ways of facilitating community building, positive peer relationships and alternatives to resorting to crime;

(11) Disability Issues - Approaches for working with residents with different types of disabilities; understanding relevant programs and statutes;

(12) Cultural Diversity - Approaches for working with religious, racial and ethnic differences among resident groups and conflict resolution, where appropriate; and

(13) On-Line Service Coordination - Approaches to dealing with establishing and administering a computerized learning center in a project, including, but not limited to: Networking skills and educational techniques, training methodologies and facilitating skills, computer skills, distance learning equipment (appropriate), and use of the world wide web. (see Chapter 9 for further information.)

(14) Other subject areas deemed necessary.

(15) Project management is also encouraged to provide in-house cross-training for family service coordinators in areas noted in subparagraph 8(d)(6), above.