

Building a Sustainable Service Coordinator Budget

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human good



Overview

- Importance of Service Coordination
- Funding Models
- Budgeting Considerations
- Service Coordinator Salary and Turnover Survey Findings
- HUD Funding Breakdown
- Best Practices

Why Invest in Service Coordination?

- Saves residents money
- Saves property money
- Improves resident health and wellness outcomes and extends tenancy length
- Saves U.S. and State money

Service Coordination by the Numbers

Average # of services provided per participant*

35

4

Average # of chronic medical conditions reported per participant



15,631

Health and wellness programs developed by SCs to address chronic medical conditions

93%

of residents with service coordinators continued to live independently in 2020



66%

How much less it costs nationally for older adults to live independently instead of in nursing homes



73.6

Average age of residents

Turnover Report Findings

- Residents are negatively impacted during service coordinator turnover
- Service coordinator turnover is higher than almost all other industries nationwide
- Stress and pay are the top two reasons for high turnover
- When a vacancy opens, it can be difficult to fill

Funding Options

- **HUD Grant**
 - Current NOFO (Due May 23!) or Renewals
- **HUD or RD Operating Budget**
 - Rent Increase
 - Excess Income
 - Residual Receipts
 - Debt Service
- **Other**
 - Developers Fees
 - Fundraising
 - Health care partnerships
 - Expanding Service Coordinators Act

HUD Service Coordinator NOFO

- Notice of Funding Opportunity (NOFO) published in December
- Deadline to apply is May 23, 2024
- Apply for expansion or to establish new programs
- \$40 million available - first new grant funding in ten years!
 - 160 awards
 - 3-year initial award, then annual renewals
 - Expected number of applicants: <1,000!
 - Expected implementation is this fall

Budgeting for Service Coordination

- Salary and Fringe
- Direct
- Indirect
- Supplies
- Training
- Travel
- Quality Assurance
- Supplies and Materials

Training

Fees and rates for appropriate training programs, to the extent known. Includes the National Service Coordinator Conference and Professional Service Coordinator Designation from Ohio State University, among other training opportunities.

First-Year

- 36 hours of training

Ongoing

- 12 hours of training

Travel

- Mileage and cost estimates for use of private vehicles or public transportation as well as per diem.
- This line item includes the estimated cost of airfare required to attend training programs such as AASC's National Service Coordinator Conference!

Direct Costs

Costs such as a case management system, telephone and internet service, printing, postage, and maintenance of office equipment, when such costs are attributable to the SC program only.

Examples include:

- AASC Online set-up costs
- AASC Online annual user fee
- Annual AASC Membership
- ResidentConnect!
- Monthly phone connection
- Translation software or services

Start-Up Costs

Reasonable costs associated with setting up a confidential office space for the Service Coordinator are allowable. Such expenses must be one-time only start-up costs. Such costs may involve acquisition, leasing, rehabilitation, or conversion of space, as well as the purchase of office furniture, computer hardware & software.

Examples include:

- AASC Online set-up fee
- Office furniture
- Phone
- Computer
- Printer/Scanner
- Tablet for mobile note taking and resident forms
- Signature pad

Quality Assurance

Quality Assurance is limited to program evaluation activities and cannot exceed 10% of a service coordinator's salary. If QA costs are budgeted, the grantee must also provide an annual report from the QA provider at the time of the Standards for Success report submission.

- AASC and HUD highly encourage QA
- Should be service coordinator specific
- Can serve as a resource and support for SCs in addition to oversight

QA
QUALITY ASSURANCE
REGISTRY

NEW QA Registry

To assist housing providers seeking to build a quality assurance program and hire quality assurance supervisors, AASC created a registry that includes details about all known providers meeting HUD requirements.

[Learn More](#)

QA Resources

HUD and AASC resources outline the role of quality assurance professionals and the requirements they should meet when supervising service coordinators.

[Learn More](#)

Annual Reporting Template

Quality assurance supervisors reviewing compliance of HUD Multifamily Service Coordinator programs must complete and submit an annual report by Oct. 30. Reports must be completed for each service coordinator the QA supervisor oversees and submitted along with the Standards for Success report. AASC has created a sample reporting form that includes all HUD reporting requirements.

[Learn More](#)

QA Tools

AASC Career Center

Contact

Salary and Fringe Benefits

- Average full-time service coordinator pay is \$24/hour
- Average benefit cost to employees for civilian workers was 31% of total compensation costs. This considers 18 benefit costs including paid leave, insurance, retirement and legally required benefits such as social security, Medicare and workers' compensation.

Salary Survey Findings

- 2023 Salary Survey Report
- Employing Service Coordinators – A State-by-State Guide
- Results Dashboard

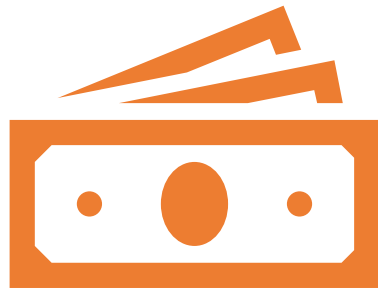
Other Opportunities to Support SCs

- Flexible Schedules
- Stipends
- Mental Health Days
- Supportive Services Funds
- Culture of service and collaboration

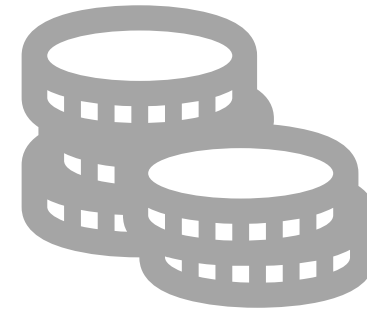
Service Coordination Advocacy

- Expanding Service Coordinators Act
- Annual Appropriations Bills (Transportation, Housing and Urban Development and Related Agencies Budget)
- AASC Resources – Case Studies, Fact Sheets and Reports

Funding Sources



Operating funds



Grant funds

Monitoring



Operating
Funds –
Account
Executives



Grant Funds –
Grants
Specialists

Operating Funds

Properties that have a Section 8 Housing Assistance Payments (HAP), and do not have an active Service Coordinator grant, and to Section 202 properties with a Project Rental Assistance Contract (PRAC). For these properties to be able to use operating or residual receipts funds (i.e., any Multifamily funds) to fund a Service Coordinator program, the requirements below must be met. These requirements also apply where an owner decides to close out a Multifamily Service Coordinator grant, and include the costs in operating, or use residual receipts. Section 811 PRAC programs are prohibited from participation in MFSC.

To receive initial approval to pay for a Service Coordinator program from project funds, you must submit form **HUD-91186** to den.incoming@hud.gov with the information for years 2 and 3 X-ed out for Account Executive to review.

Thereafter, you must submit a completed **HUD-91186A** with each budget-based rent increase request, and with **each** contract renewal request.

Grant Funding

- When funds are available for new service coordinator programs, HUD makes those funds available through a Service Coordinators in Multifamily Housing program Notice of Funding Opportunity (NOFO)
- NOFO is for an initial 3-year term and provides annual extension funding subject to the availability of funds.
- Annual extension funds are to be used only to meet a critical need. A “critical need” means addressing a need that cannot be met through other funding resources
- In the event of extension funding delays, owners may access available Reserve for Replacement funds and reimburse it immediately once they received their annual grant extension funds
- Subject to the availability of funds, HUD may universally apply an increase based on the most recent Cost of Living Adjustment (COLA) per the Social Security Administration, which is issued every October on their website

Service Coordinator Requirements

- SC hours must be consistent with the assisted resident population. In general, a ratio of one fulltime SC to 50 to 100 residents is reasonable.
 - Bachelor's degree or appropriate work experience
 - Knowledge of and training in elderly and disability services
 - Knowledge of referral process
 - Demonstrated working knowledge of local services for the elderly and people with disabilities
- 2-3 years of social service delivery experience. Preferable for service coordinators to have direct experience working with elderly people or people with disabilities

System Access

To register as a new organization in HUD's system, there are several steps that need to be taken in a specific order

Secure Systems

GrantSolutions

ELOCCS

Secure Systems

Register the organization with HUDs internal portal secure systems through online application to receive User ID and password

Please note that the Coordinator must assign the Coordinator ACTION and then the Query (QRY) and Administrator (ADM) ROLES to themselves and then they may assign QRY and ADM roles to other users.

User Login [faq](#) | [help](#) | [search](#) | [home](#) | [logout](#)

Secure Systems

You must login at least once every 90 days to maintain an active ID. If you do not login again before 2 Jul 2024, your ID will be automatically deactivated. If your User ID is deactivated, please contact the TAC to reactivate your ID.

Legal Warning

Misuse of Federal Information through the HUD Secure Connection web site falls under the provisions of title 18, United States Code, Section 1030. This law specifies penalties for exceeding authorized access, alterations, damage, or destruction of information residing on Federal Computers.

Warning Notice

The Secure Systems security access software supports Internet Explorer 7.0 browser. Other browsers may not be compatible with this software.

Message of the Day

Welcome to Secure Systems

Content updated January 6, 2018 [Back to Top](#)

U.S. Department of Housing and Urban Development
451 7th Street S.W., Washington, DC 20410
Telephone: (202) 708-1112 TTY: (202) 708-1455

GrantSolutions



Department of Housing and Urban Development

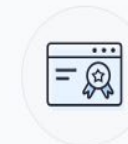
Welcome Jasmine Baker

Username: JBaker34

GrantSolutions Services



BI Dashboard



GMM



RDI

Grant management services for HUD grantees. Grants Management Module is used to access grant information, upload documents, submit reports, and apply for renewals.

To create an account grantees must submit the Grant Recipient User Account Request Form including:

- Rules of Behavior
- Account Request Form

Send via fax or electronically to help@grantsolutions.gov

LOCCS is HUD's primary grant disbursement system, and grants are disbursed using the online eLOCCS system. eLOCCS is accessed through Secure Systems.

Complete form HUD-27054E (eLOCCS Access Authorization Form) and send to the Grants Specialist by email or mail

eLOCCS
Access Authorization Form

U.S. Department of Housing
and Urban Development

OMB Approval No. 2535-0102
(exp. 08/31/2026)

See Instructions, Public Burden, and Privacy Act statements before completing this form.
BUSINESS PARTNER (grantees) - Please review the guidance on PAGE 3 for completion of HUD form 27054E. There is a MANDATORY REQUIREMENT for a NOTARY, signature & seal, for ALL forms submitted requesting "New User, Reinstate User, and Changing Secure Systems ID". Once completed - Send HUD form 27054E via Secured Email to the HUD Program Officer assigned to your organization. All fields must be typed in except for signatures and initials.
HUD PROGRAM OFFICER - Please review all applications for accuracy then submit HUD form(s) 27054E, secured via WinZip, to the designated INTERNAL email address provided for 27054E HUD FORMS.

1. Type of Function(s) <input type="checkbox"/> 1. New User <input type="checkbox"/> 6. Add or Remove Program Area(s) <input type="checkbox"/> 2. Reinstate User <input type="checkbox"/> 8. Add or Remove Tax-ID Number(s) <input type="checkbox"/> 3. Terminate User <input type="checkbox"/> 7. Name/Address Change <input type="checkbox"/> 4. Change Secure Systems ID <input type="checkbox"/> 8. Other: _____			2a. Secure Systems ID <div style="border: 1px solid red; height: 20px; width: 100%;"></div> <small>Mandatory (Special Instructions for Termination Included in Instructions)</small>	2b. New Secure Systems ID <div style="border: 1px solid blue; height: 20px; width: 100%;"></div> <small>(If changing Secure Systems ID)</small>
3. Authorized User's Name Last Name First Name MI <div style="border: 1px solid blue; height: 20px; width: 100%;"></div>		Title (mandatory) <div style="border: 1px solid red; height: 20px; width: 100%;"></div>		
Complete Mailing Address <div style="border: 1px solid blue; height: 20px; width: 100%;"></div>				
<small>Personal/Business email must contain the name of the applicant; Generic emails are not accepted</small> <div style="border: 1px solid blue; height: 20px; width: 100%;"></div>				
4. Authorizations (see next page) <small>Required for New User, Reinstate User, Revise Authorization and Terminate user functions. Attach one or more authorization pages as needed. Record the number of attached pages to the right. The Approving Official and HUD Program Office POC should initial each page.</small>		Number of Authorization Pages Attached <div style="border: 1px solid blue; height: 20px; width: 100%;"></div>		
5. Authorized User's Signature (must be legible) <div style="border: 1px solid blue; height: 20px; width: 100%;"></div>		Date (mm/dd/yyyy) <div style="border: 1px solid blue; height: 20px; width: 100%;"></div>		
<small>I authorize the person identified above to access eLOCCS via HUD's Secure Systems.</small>				
6. LOCCS Approving Official Name Last Name First Name MI <div style="border: 1px solid blue; height: 20px; width: 100%;"></div>		Title <div style="border: 1px solid blue; height: 20px; width: 100%;"></div>		
<small>Personal/Business email must contain the name of the applicant; Generic emails are not accepted</small> <div style="border: 1px solid blue; height: 20px; width: 100%;"></div>		Secure Systems User ID (mandatory) <div style="border: 1px solid red; height: 20px; width: 100%;"></div>		
Complete Mailing Address <div style="border: 1px solid blue; height: 20px; width: 100%;"></div>		Office Telephone Number (Include area code) <div style="border: 1px solid blue; height: 20px; width: 100%;"></div>		
Approving Official's Signature (must be legible) <div style="border: 1px solid blue; height: 20px; width: 100%;"></div>		Date (mm/dd/yyyy) <div style="border: 1px solid blue; height: 20px; width: 100%;"></div>		
6. HUD Program Office Point of Contact's Name <small>(HUD Program Officer must be registered in LOCCS Web as a user)</small> Last Name First Name MI <div style="border: 1px solid blue; height: 20px; width: 100%;"></div>		Title <div style="border: 1px solid blue; height: 20px; width: 100%;"></div>		
H-ID <div style="border: 1px solid blue; height: 20px; width: 100%;"></div>		Office Telephone Number (include area code) <div style="border: 1px solid blue; height: 20px; width: 100%;"></div>		
HUD Program Office Point of Contact's Signature (must be legible) <div style="border: 1px solid blue; height: 20px; width: 100%;"></div>		Date (mm/dd/yyyy) <div style="border: 1px solid blue; height: 20px; width: 100%;"></div>		

I/We, the undersigned, certify under penalty of perjury that the information provided above is true and correct. **WARNING:** Anyone who knowingly submits a false claim or makes a false statement is subject to criminal and/or civil penalties, including confinement for up to 5 years, fines, and civil and administrative penalties (18 U.S.C. §§ 287, 1001, 1010, 1012, 1014; 31 U.S.C. §3729, 3802).
 Previous editions are obsolete. Form HUD-27054E (12/2023)

Page 1 of 4

Eligible Costs

- Salary
- Fringe Benefits
- Indirect Costs
- Quality Assurance
- Training and Travel
- Supplies and Materials
- Other Direct Cost

Indirect Costs

Under 2 CFR 200.414(f), applicants/recipients who have never had an indirect cost rate may claim a *de minimis* rate of 10% of Modified Total Direct Costs (MTDC), without negotiations. Any amount above the 10% would require a federally negotiated rate.

Eligible

Administrative Fees

Accounting

Utilities for Service Coordinator office

Ineligible

Building-related expenses that are being reimbursed through operating subsidies.

Usual audit and legal fees

Increasing management fees

Other Direct Costs

Eligible

- Start-up Costs includes one-time costs associated with setting up office space
- Items such as telephone, Internet, printing
- Office equipment leasing

Ineligible

- Supervision performed by property management staff. (*Management fees already pay for such supervision.*)
- Cost overruns associated with creating private office space

Quality Assurance

Required Information

- Title of the professional performing the QA
 - Number of hours used and rate
- QA is limited to MFSC program evaluation

Ineligible

- Usual audit and legal fees
- Application preparation and submission
 - Charges above 10%

Training and Travel

Eligible

- Training ticket/registration fees
- Per Diem for meals during trainings
- Costs for transportation to and from training

Ineligible

- Courses for management/staff who do not directly provide Service Coordination.
- Restaurant meals/travel not associated with approved training and/or not included in the approved budget

Supplies and Materials

Eligible

- Post its, pens, paper
- Folders, clips, binders
- Printer Supplies (Ink and toner)

Ineligible

- Equipment not required by the Service Coordinator.
- Food and Beverages
- Gifts to residents or staff

Reporting Requirements

- HUD-91186A – one year budget form
- Grants only: HUD-50080-SCMF, submitted semi-annually. Reporting period 1: January 1 – June 30 (**report deadline: 30 days after the end of the reporting period – July 30**)
Reporting period 2: July 1 – December 31 (**report deadline: 30 days after the end of the reporting period – January 30**)
- Operating and Grants: Standard for Success (SfS) Annual Performance Report, submitted annually. Reporting period: October 1 – September 30 (**report deadline: October 30**)
- Operating and Grants: Quality Assurance Report, submitted annually (if applicable). Reporting period: October 1 – September 30 (**report deadline: October 30**)

20080 Expense Report

A B C D E F G H I J K L M N O

LOCCS Payment Voucher/Expense Report Service Coordinators Multifamily Housing

1. Date of eLOCCS Request (mm/dd/yyyy)

2. Period Covered by this Request From (mm/dd/yyyy): To (mm/dd/yyyy):

3. Voucher Number

4. Budget Line Item

1010 Salary	<input type="text"/>	\$0.00
1020 Fringe Benefits	<input type="text"/>	\$0.00
1040 Quality Assurance	<input type="text"/>	\$0.00
1045 Training	<input type="text"/>	\$0.00
1050 Travel	<input type="text"/>	\$0.00
1055 Supplies and Materials	<input type="text"/>	\$0.00
1060 Start-up Costs	<input type="text"/>	\$0.00
1065 Other Direct Costs	<input type="text"/>	\$0.00
1070 Indirect Costs	<input type="text"/>	\$0.00
5. Total	<input type="text"/>	\$0.00

6. Expense Information

LOCCS BLI Number (Use numbers shown in cells A12-A28)	Date of Expense/Billing Date	Expense/Item Description	Payee	Invoice, account, or check number	Amount	Date Paid (if paid in this month/quarter)
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SfS Submission Confirmation Page

Everett Housing Authority > Evergreen Court



Organization Name: Everett Housing Authority

Property Name: **Evergreen Court**

Property Address: 10809 16TH Ave SE, Everett, WA 98208

Report Submitted by: **Shannon Atkins (Supervisor)** (RSC Supervisor)

Report Submission Date/Time: **10/29/2021, 3:39 PM CST**

Report Date Range: **10/1/2020 - 9/30/2021**

HUD Contract #: **WA19S951002**

Included in SfS Submission:

Recordkeeping Requirements

In accordance with 2 CFR 200.333, grantees should keep all records for a period of 3 years starting from the date of the last draw down request. These records will include:

Client files

Program files

Voucher requests and supporting documentation

Quality Assurance evaluation reports

Reporting

Common Mistakes

- Incorrect or obsolete forms
 - Labeled incorrect
 - Wrong section completed
- Signature in the place of initials
- Incorrect Secure Systems roles
- Not enough detail on Expense Report
- Signature/initial dates need to match the day it was notarized
- All Grantsolutions forms should be sent to Help@Grantsolutions.gov for processing

Increase Requests

Grant Funds

Subject to the availability of funds, HUD may allow for reasonable increases, on a case-by-case basis.

To be considered for an adjustment, grantees must attach a separate document via Grant Notes. The attachment must be signed and dated by the authorizing official and must detail the budget line items for which an adjustment is being requested, the related costs, and a justification.

Will be reviewed by GS and HQ for available funding, eligibility and reasonableness and approved/disapproved

Increase Requests

Operating Funds

Regarding allowed annual increases to Service Coordinator program costs:

At this time, the language on forms **HUD-91186** and **HUD-91186A** in respect to 3-percent increases **does not apply**, nor does the annual increase percentage allowed for grant-funded programs. Increases should be based on reasonable increases to program expenses and should reflect the same increases as projected for other operating budget expenses, such as salary and benefits.

NOTE: We understand that other program policy, such as, limitations on available rent increase options, could impact the owner's ability to obtain rent increases.

Comparative data

Case by case where is it competition, and more.

Budget Hours

Grant Funding

Justify with note uploaded to GrantSolutions and Completed Reallocation form

Request for Reallocation of Grant Funds

Please use this form to explain the requested reallocation of grant funds from one budget line item (BLI) to another. This is not requesting new money, but only to re-allocate what is in your current approved budget.

Date:

Grant Number:

Organization:

Contact:

Contact Number:

Grantee must describe the reason for redistribution of funds:

FROM Budget Line Item (BLI)	Amount to <u>be</u> Re-allocated	TO Budget Line Item (BLI)
Example: 1065	\$750	1010
<input type="text" value="Click or tap here to enter text."/>	<input type="text" value="Click or tap here to enter text."/>	<input type="text" value="Click or tap here to enter text."/>
<input type="text" value="Click or tap here to enter text."/>	<input type="text" value="Click or tap here to enter text."/>	<input type="text" value="Click or tap here to enter text."/>
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<input type="text" value="Click or tap here to enter text."/>	<input type="text" value="Click or tap here to enter text."/>	<input type="text" value="Click or tap here to enter text."/>

Service Coordinator Budget Hours

Operation Funds

When can an increase be requested?

Submit with renewal or rent increase

Can you increase throughout the year?

Yes, if you do not need a rent increase. If property has sufficient funds in operating to do so. Mid-cycle rent increases are not typical however, Chapter 8 of the 4381.5, states the owner may request to use residual receipts to offset the SC cost. If funds are depleted, they may request a Special Rent Adjustment (S8 only) provided certain conditions are met.

Non-compliance

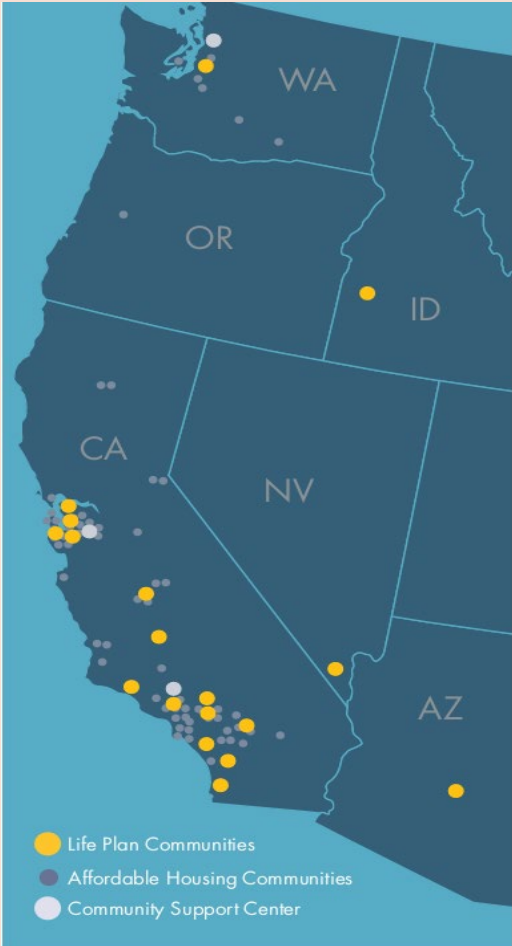
- Any use of funds for a purpose other than as authorized by HUD
 - Breach of or noncompliance with relevant laws, regulations, administrative program policies, or other documents approving the use of project funds
- Any misrepresentation in a funding request that, if known to HUD, would have resulted in the funds not be provided
 - Unresponsive

HumanGood Overview

BY THE NUMBERS OF LIVING ACCOMMODATIONS

	Life Plan Communities	Affordable Housing Communities	Total
California	12	54	66
Pennsylvania	3	35	38
Washington	2	9	11
Delaware	0	1	1
Massachusetts	2	0	2
Oregon	1	1	2
Nevada	1	0	1
Idaho	1	0	1
Arizona	1	0	1
Total	23	100	123

Approximately Total Residents Served: 15,000



HumanGood Affordable Housing

- HumanGood is the sixth-largest nonprofit senior living provider in the country
- Three Business Lines within the Affordable Housing Department
 - **Property Management** - focuses on diligent fiscal and asset management, compliance and maintenance of our communities.
 - **Development** - focus on the growth of our affordable housing mission to serve more seniors in underserved communities. Also focus on redevelopment of our existing communities, to ensure they remain attractive and safe for our residents.
 - **Resident Services** - enhancing the lives of our residents through enriched services



Purpose of Resident Services

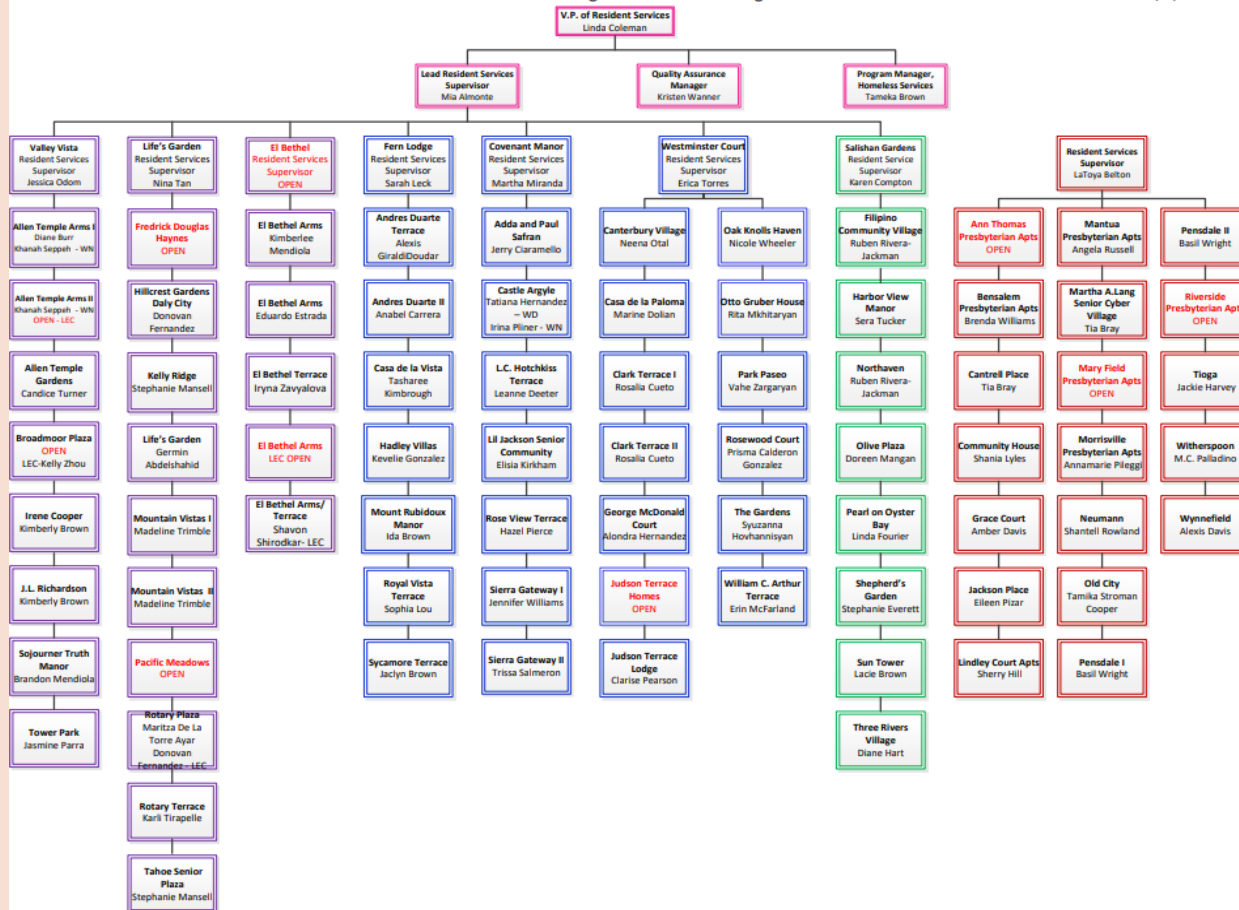
- To create interlocking services that transforms basic life enrichment activities into a solid infrastructure that enhances wellness and supports functional independence of our residents
- Seek out and expanding partnerships with county providers, community based providers, educational institutions and health care providers



Resident Services Department

HumanGood Affordable Housing Resident Services Organizational Chart

As of 4/1/2024



- VP of Resident Services
- Program Manager, Homeless Services
- Quality Assurance Manager
- Lead Resident Service Supervisor
- 8 = Resident Service Supervisors
- 65 = Resident Service Coordinator
- 6 = Life Enrichment Coordinator
- 2 = Nurses (IWISH)

Operations and Resident Services as Partners



- Mutual understanding and appreciation of each position's roles
- Willingness and commitment to a collaborative approach
- May at times approach a situation from different perspectives
- End goal is the same for all team members, the welfare of the resident

“We are partners who respect and trust each other”

Resident Services Agreement

- Purpose: to define roles, responsibilities, and interactions to help promote a solid team with the goals of addressing residents needs
- Reviewed and signed by the Administrator, Regional Property Supervisor, Resident Service Coordinator, Life Enrichment Coordinator and Resident Services Supervisor
 - Completed each time there is a new team member in one of the above positions



RESIDENT SERVICES AGREEMENT

AFFORDABLE HOUSING COMMUNITY: _____

This Service Agreement (SA) helps define roles and interactions to help promote a solid team with the goal of addressing resident needs and providing the best quality of life for all residents. HumanGood's mission is to redefine the meaning of aging well for our residents, and deliver products and services that offer opportunities to pursue engaged, and purposeful lives. HumanGood strives to enable residents to live in their homes for as long as possible by coordinating appropriate supportive services. HumanGood Affordable Housing has a unique reporting structure to help foster such services.

The Community Administrator (Admin) and the Resident Service Coordinator (RSC) are both professionals whose special positions enhance the lives of residents and add to the welfare of the community as a whole. The Admin is responsible for the healthy operation and maintenance of the entire housing community as well as the safety and security of the residents. The RSC expedites service management within the housing community. The RSCs are skilled and trained to assist in the identification of resident needs and accessing community services and support systems to address these needs.

The Resident Services Supervisors (RSS) and Regional Property Supervisors (RPS) will work in partnership and collaboration to bring high standards of services and residents' satisfaction to the communities that they jointly oversee. This is to assure a harmonious team environment and culture amongst the team members of the communities.

Collaboration between Operations and Resident Services

- Reasonable Accommodations
- Lease Education
- Lease Violation Resolution
- Partnerships
- Food Bank and Distribution
- Foundation Requests
- Donation Requests
- Holiday Parties and Special Events
- Incident Reporting
- Programs
- Presentations
- APS Reporting
- Budget



Resident Services Funding Types

- Budget Based – 84 communities
 - Cost of the Resident Service Coordinator is built into the communities operating budget
- Grants – 16 communities
 - HUD Grants
 - IWISH (Integrated Wellness in Supportive Housing)
 - Pilot ends in September 2024 and HumanGood will be applying for the Resident Services NOFO to sustain the Wellness Director positions
 - Other Grants



Implementing a Resident Services Program in New Developments (Budget Based)

- Resident Services is involved from the beginning
- Resident Services works collaboratively with development to complete the application of funding for the new development
- The application entails a section on Resident Services where we have to complete a Service Plan that includes:
 - Target tenant population
 - Referral partners
 - Commitment letters
 - Service delivery strategies
 - Training plans
 - Staffing
 - Supportive services budget
 - Salary, benefits, training, travel, supplies, etc.
 - Funding history
 - Measurable outcomes
 - Plan for evaluation



Resident Services Budgets in Existing Communities (Budget Based)

- Resident Services submits a yearly budget to Property Management
 - Expenses include:
 - Salary and benefits
 - Quality Assurance Fees
 - Training
 - Meals
 - Travel
 - Supplies
 - Membership Fees
- Property Management enters the Resident Services budget into their budget worksheet
- Budgets are reviewed by our Asset Management team and then submitted to HUD and/or investors for final approval
- Resident Services is notified once budgets are approved



Grants

- HUD Service Coordinator Grants
 - Applied for a NOFO (Notice of Funding Opportunity) over a decided ago through HUD and was able to secure 11 grants
 - Grants are renewed on a yearly basis
 - Budgets are submitted to the Grant Specialist annual for review and approval
- Other Grants
 - Building on Networking and Relationship are key to learning about grants
 - Determine where grants are needed
 - Communities with no resident service coordinators
 - In March 2024, the Seattle Office of Housing awarded funding for three full-time Resident Services Coordinators at HumanGood



Budgeting for Resident Services

- Salary
 - Salary Surveys, Salary Comps, U.S. Bureau of Labor Statics
- Fringe
 - Asset Management provides the estimated fringe (FICA, Workers Compensation, Health Insurance, Retirement, and Unemployment Insurance)
- Quality Assurance
 - 10% of total annual salary
- Training
 - Estimate all the costs for conference registrations and webinars
- Travel
 - Estimate costs for flights, meals, transportation, etc
- Supplies
 - Usually budget around \$500 per year.
- Other Direct Costs
 - Database cost and membership fees



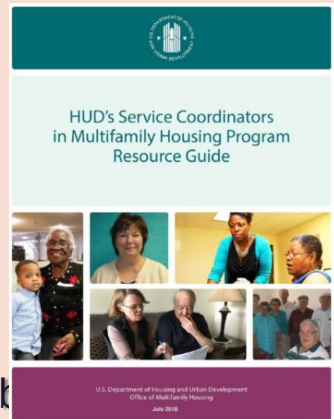
How to Make Changes to Budgets

- Budget Based
 - Communicate with Property Management and Asset Management on the changes that are needed
 - Property Management to submit the request during the contract renewal process
 - Rent increases
 - Find alternative funding revenues to cover expenses (moving funds in line items, foundation, etc)
- HUD Grants
 - Work with Grant Specialist
 - Request an increase during the annual budget submission



Quality Assurance?

- Ensures the Resident Services Program is being implemented, monitored and evaluated effectively
- Quality Assurance Tasks:
 - Monitoring service coordinators' activities
 - Reviewing service coordinators' files
 - Providing technical assistance and guidance
 - Setting goals and completing program evaluations
 - Developing supportive services plan and property-wide profiles
 - Helping the service coordinator establish and sustain partnership
 - Privacy of residents
- Quality Assurance professionals are directly hired or contracted by the property owner or of the corporate management team
- Recommended Qualifications of a Quality Assurance Professional
 - Bachelor's degree in Social Work, Gerontology, Psychology, Counseling, or a related health care field, although any other bachelor's degree is acceptable with relevant social service experience; master's degree is preferred
 - Training in the aging process, elder services, disability services, and other issues specific to understanding the population that the service coordinator position serves
 - Two to three years of experience in social service delivery
 - Demonstrated working knowledge of supportive services and other resources in the area served by the project
 - Demonstrated ability to organize, develop outcomes and appropriate outcomes measures, problem solve, and provide results



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Quality Assurance


- Quality Assurance is an allowable expense through HUD

- HUD approval is needed prior to collecting fees
- Can collect up to 10% of the Service Coordinators salary

- Quality Assurance Reporting

- Must report activities and the results to HUD on an annual basis
- Reports are submitted to HUD along with the Standard for Success Report
- Topics covered in the report:

- Accessibility to the residents, including sign indicating the service coordinator’s contact information, and office hours
- Whether file storage is effective and secure, including password protection for electronic files
- Resident files are organized and containing intake forms, assessments, consents for release of information, supportive services plans, progress notes, etc.
- Whether references to community-based providers are kept in an organized fashion
- Documentation of requisite training topics and hours for the service coordinator.
- Outreach efforts and wellness activities conducted or arranged by the service coordinator
- Situations where the QA professional provided technical assistance with difficult or unique resident situations.
- Results of surveys of management and/or residents regarding the service coordination program
- Review of supportive services partnerships developed in the community.
- Adherence to standards in the Privacy Act of 1974.

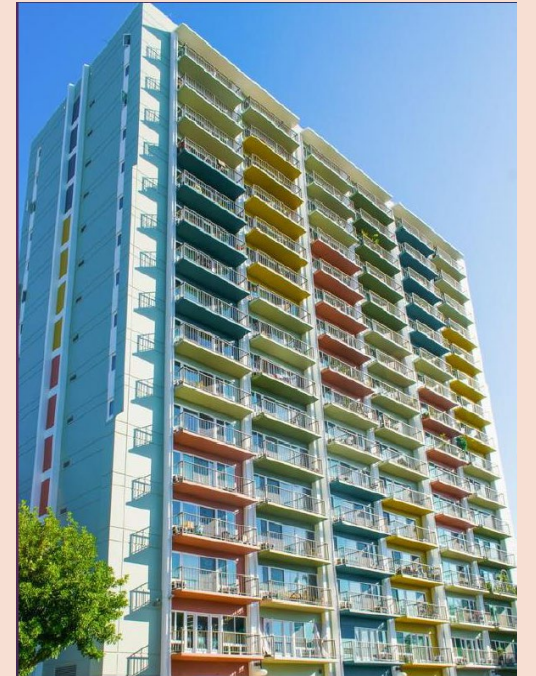

RESIDENT SERVICES QUALITY ASSURANCE REPORT

Resident Service Coordinator Name:	Click or tap here to enter text.		
Community Name	Click or tap here to enter text.	Community Address	Click or tap here to enter text.
# of Apartments	Click or tap here to enter text.	# of Residents	Click or tap here to enter text.
Reporting Period	Click or tap here to enter text.	Funding Source	Click or tap here to enter text.
Project #	Click or tap here to enter text.	Grant #	Click or tap here to enter text.
DUNS #	Click or tap here to enter text.	Database Platform	Click or tap here to enter text.

Program Administration			
Questions	Yes	No	Comments
RSC qualifications are consistent with HUD and HumanGood guidelines?	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.
RSC training requirements have been met according to HUD and HumanGood standards? (1 year=26 hours; on-going=12 hours)	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.
RSC training certifications, signed job description, and resume are located in their QA File?	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.
RSC office is clearly identifiable, accessible and private?	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.
RSC office hours are clearly posted outside of office?	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.
RSC files kept locked and confidential?	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.
Brochures and community resources are accessible and available to residents?	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.
Have any new programs been established in the community?	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.
Is the RSC full time?	<input type="checkbox"/>	<input type="checkbox"/>	Number of Hours: Click or tap here to enter text.
Is the RSC adhering to standards in the Privacy Act of 1974?	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.
ADL/IADL Information			
# of residents with an ADL	Click or tap here to enter text.	# of residents with an IADL	Click or tap here to enter text.
# of frail elderly residents	Click or tap here to enter text.	Definition: residents deficient in 3 or more ADLs	
# of at-risk elderly residents	Click or tap here to enter text.	Definition: residents deficient in 1 or 2 ADLs	
All other	Click or tap here to enter text.	Definition: residents with no ADL's or responded as unknown	

How to Advocate for Additional Staff and Hours

- Recognize the need for additional staff at community
 - The number of residents versus Resident Services Coordinator
 - For Example, the NOFO states 1 full-time RSC should serve an average 50-60 elderly residents and/or person with disabilities.
 - Increased Health Needs
 - Behavioral Health requiring intensive case management
- Collaborate with Asset Management, Regional Supervisor and Onsite Staff
 - Determining current budget for RSC
 - Advocate
 - Conducting research on compensation in the area
 - Asset Management determines community fund availability
 - Approvals are sent to HUD and/or investors depending on community



How HumanGood Supports Resident Service Coordinators to Reduce Turnover

- Salary compensation is evaluated on a consistent basis
- Culture of Resident Services Teams
 - Monthly department meetings
 - Mentorship and Support from Supervisors
 - Vital Connections
- Opportunities for professional growth
 - Leadership programs
 - Encouraged to attend industry conferences and trainings
 - Tuition reimbursement
- Flexibility with schedules



Supportive Services Funding

- Purpose:
 - **Section 202 PRACS: Supplemental funds for programming and services that facilitate independent living**
- HUD [Notice H-2023-02](#) was published in February 2023
- Operating budget may include up to \$15 per unit per month for direct provision of supportive services
- RAD for PRAC conversion: an additional \$12 so \$27 per unit per month



Supportive Services Funding

- When to apply for funds?
 - During Budget-Based Rent Increase
- What is needed to apply for funds?
 - Supportive Service Plan
 - Demographics of the community
 - Health Conditions
 - ADL's and IADL's
 - Supportive Services
 - Community Based Programs
 - Budget
 - Examples can be found on LeadingAge's website

Sample Supportive Services Plan #1

[Property Name] Supportive Service Plan
[Date Range for the Plan (2024-2027)]

[Property Name] serves [#] of low income older adults in [geographic area]. As mission-driven affordable senior housing providers, we are committed to supporting our residents as they age in our community with independence and dignity.

1. Understanding our Resident Population Through Resident Assessments

Our Service Coordinators conduct initial and ongoing voluntary assessments of residents to understand the health conditions and services needs of our resident population. These assessments are conducted [quarterly] via [phone or in-person] interview with the use of an interpreter as needed and cover a variety of health conditions and needs related to independent aging, like Activities of Daily Living (ADLs) and Instrumental Activities of Daily Living (IADLs). At the end of the fiscal year, the assessment results are aggregated and submitted to HUD [via the annual Standards for Success reporting process]. This information is also used to generate a Property-Wide Profile.

• Demographics of the Community

% [Age, Gender, Race/Ethnicity, other statistics]

• Health Conditions

% [Hypertension, Arthritis, Back/Spine Problems, High Cholesterol, Diabetes, Blind/Visually Impaired, Cataracts, Asthma, COPD]

• ADLs and IADLs

% [Eating, Bathing, Grooming, Dressing, Transferring, Toileting, Ambulation/Locomotion]

% [Ability to Use Phone, Handling Finances, Housekeeping/Laundry, Med Management, Meal Prep, Shopping, Transportation]

2. Meeting the Needs of Our Resident Population

The property currently serves [###] residents, including [%] with [high needs/one or more ADLs/two or more ADLs/health conditions]. The property's Service Coordination program currently supports [#] [full-time/part-time] Service Coordinators to connect residents to the services provided in the broader community and to arrange for property-based services. These Service Coordinators are funded [out of the property's budget/via previous HUD grants/other funding mechanism].

- **Resident Outreach:** Our Service Coordinators conduct outreach to residents by calling residents on the phone, conducting "house calls," and utilizing a group email service that is available in multiple languages of resident self-selection. In [Calendar Year 2023], [%] of our residents were engaged with the Service Coordination program, and [#] participated in supportive services programs offered at the property throughout the year. In addition, our team of Service Coordinators attempts contact with every non-participating resident [once per quarter via

Supportive Services Funding

■ How the funds can be used:

- To Individual residents:
 - Meal and food services
 - Housekeeping aid
 - Personal assistance
- Provided to entire community:
 - Transportation services
 - Health-related services
 - Social Interaction programming
 - Individual education and counseling

■ How funds cannot be used:

- RSC compensation
- Housing costs
- Direct costs of medical services
- Internet in apartments or resident computers
- Promotional materials
- Admission tickets
- Party refreshments

Questions

