



MANAGER/SERVICE COORDINATOR RELATIONSHIP POLICY RECOMMENDATIONS

For facilities that have a service coordinator (SC), it is critical that he/she be an active and full member of the facility team. Teamwork implies an active collaboration between team members where all are recognized for their particular area of expertise, where their views are respected, and where team members actively listen and learn from each other. The manager, SC, and other relevant facility staff should meet together on a regular basis (at least weekly) to jointly consider issues that arise with all receiving relevant written materials, memos, lease violation and eviction notices, and facility updates on a periodic basis. This includes any federal notice changes which impact residents or changes in the resident selection plan or facility house rules.

Additionally, it is recommended that whenever possible managers and SC's attend educational trainings together. Additionally, it is beneficial for other facility staff to receive training in aging and related issues. It is important that SC's be made aware of the responsibilities, rules and regulations surrounding the housing industry and the pressures on management that they may represent.

Incorporating the SC into this team may require some compromise among team members. On the one hand, the SC must recognize that the successful fulfillment of his/her position necessitates maintaining a delicate balance between the needs of residents and the expectations as an employee of the Management Company. On the other hand, since one of the SC's major functions is advocacy on behalf of residents, it is important that management is sensitive to this role even though such advocacy efforts may appear to conflict with the immediate expectations of the Management Company. Communication is the key ingredient to a successful partnership.

Successful teams take steps 'up front' to avoid problems later on down the road. To ensure successful teamwork among management and service coordinators, the following steps may be initiated:

➤ **Training/Orientation:**

Review the job descriptions of everyone on the management team. Identify how resident support has been implemented whether formally or informally, and address the overlaps in job descriptions to everyone's satisfaction.

Clearly define the SC role as separate from other management functions. This ensures that staff demands do not conflict or compete with the coordinator's primary role as resident advocate. This means SC's should not be assigned property management or lease functions such as collecting rents, performing physical inspections, certifying housing eligibility, carrying out lease violations, supervising clerical or maintenance staff and so on. Implementing a 'Memorandum of Understanding' outlining the role of the manager, service coordinator and other significant staff, will support this fundamental principle of the SC program and prevent confusion amongst residents. * It should be noted that property/resident issues may arise that could require jobs to overlap when handling a crisis

or other circumstances that requires a temporary accommodation of the issue. At no time should residents confuse the manager's role with the SC, nor compromise resident confidentiality.

Provide an adequate orientation. It is important that the SC is aware of and understands the policies and procedures, which governs residency. The minimum documents that should be provided, at the time of hire, include the tenant selection plan and application packet, the lease agreement and related addendum's, the tenant handbook/house rules, the policies and procedures which govern the facility (ie. evictions, work orders, etc.) and the by-laws of the tenant organization, if any. It is recommended the manager be involved with training the SC on these matters whenever possible. Having the SC 'shadow' the manager for a length of time will help the SC understand the responsibilities and pressures of management. Additionally, residents should receive an orientation to the position where community service providers can also be invited to attend. Whenever possible, the manager and SC should attend resident related training seminars together, at least once a year. Learning builds confidence, trust, and respect. Team training can also contribute to an increase in self-esteem and pride.

Recognize the importance of networking with peers. The SC position is unique and varied. Over time, the SC is likely to facilitate, coordinate, communicate, arbitrate, deliberate, advocate, empower, reach out and listen. A support network is essential for SC's to have opportunities to meet and exchange information with others experiencing like responsibilities, challenges and gaps in the service delivery system. Information acquired locally, statewide and nationally will give SC's expanded knowledge and ideas that can serve management as well as residents. It is *essential* that SC's be provided the appropriate tools and technology (computer and software) which gives them access to information regarding grants, service programs, and other networking opportunities to perform their job.

➤ **Supervision:**

Establish clear and appropriate supervisory arrangements. The SC supervisor plays an important role in promoting a sense of trust, mutual understanding and respect among the SC and other members of the property management team. He/she must be able to remain objective and supportive if the ethics and underlying principles that guide the SC position clash with those of other property management personnel or with existing residential policies. It is strongly recommended that Quality Assurance be performed by a qualified third party with a background in social work practice. It is often customary for the SC to be supervised by management within the employer/employee policies. In circumstances where this is not possible, arrangements should be made for the SC to have access to a social work professional (organization or individual) with whom they may address social work issues and addresses quality assurance systems necessary for the position. This can protect the manager if liability becomes an issue.

Recognize complementary roles surrounding lease violations and reasonable accommodations. The manager and SC assume very different roles when addressing lease violations or interacting with residents in the reasonable accommodation process. The housing manager is responsible for advising residents of lease violations. The SC may be asked to assist residents in addressing issues that threaten their tenancy, but only if the SC referral is made with the residents' concurrence. The SC should never be expected to address a lease violation incident if the housing manager has not notified the resident of the issues involved and suggested assistance by the SC. The same complementary role applies to the reasonable accommodation process in which the manager advises residents that the SC is an available resource for them to access or explore reasonable accommodation options. The SC can help prevent evictions from happening with early intervention.

➤ **Job Expectations:**

Have realistic expectations. The SC should not be expected to ‘perform miracles’ or to solve all resident problems and community issues that arise. Long-standing chronic issues are not likely to go away overnight, if at all. Hopefully, however, the SC can assist residents in keeping problems at manageable levels or help prevent problems from escalating to crisis proportions.

Be willing and able to “let go”. This means willingly transferring responsibility for the provision of supportive services to the SC. This can be difficult for some members of the management team if they have derived their primary job satisfaction from “helping” residents. From the onset, however, the willingness to direct resident’s inquiries and request for assistance of the SC establishes a clearly defined role for him/her.

➤ **Conflict Resolution:**

Support the confidentiality boundaries of the position. The SC has an ethical and sometimes legal responsibility to safeguard resident confidences. The promise of confidentiality is essential for establishing trust between SC’s and residents. Without it, residents may not disclose important information. Management should not expect the SC to divulge specific information about residents’ problems or expect access to SC files without the knowledge and informed consent of the resident. This is also true, if and when the SC requires information from the manager’s files. In situations, where the SC files are to be used in court for any reason, a subpoena is recommended.

Respect the ethics and guiding principles of the position. Failure to clearly recognize and support the SC’s values concerning resident autonomy, self-determination, rights to privacy and other professional principles will eventually lead to problems, conflict and dissatisfaction. Problems or conflicts can result particularly if housing management focuses exclusively on the outcomes without understanding the importance of the underlying process involved in working with residents and ensuring they are active participants in the resolution of problems.