

SERVICE COORDINATORS

An Essential Link for Seniors to Age in Place

BY LARRY MCNICKLE

In 2006, the first wave of 76 million aging baby boomers turned 60 years old, ushering in a tsunami age-wave that will result in a significant increase in the number and percentage of senior citizens over the next few years. The current number of persons aged 65 and older is projected to double from 35 million (12.4%) to over 70 million (20%) in less than twenty-five years. Perhaps more importantly to public policy makers, those aged 85 and older—who are the most frail and in need of services—are projected to quadruple from 3.5 million to 14 million. Approximately 3.4 million (11%) of the elderly are poor; the poverty rate for elderly women (13.6%) is twice the rate of elderly men and the poverty rate of elderly blacks and Hispanics is more than double the rate for elderly whites.

How to Help Frail Elderly Remain in Public Housing

This graying of America will affect every aspect of our social, economic and community life, including an increased need for safe, decent,

affordable and suitable housing for seniors.

Public housing was established to provide safe, decent and affordable rental housing for low-income families, elderly and persons with disabilities. There are 1.3 million households living in public housing, and almost half of all residents are elderly or persons with disabilities. Senior households represent over one-third of public housing residents, including over 50,000 seniors age 83 and older. In some housing agencies (HAs), the elderly and persons with disabilities may represent over three-fourths of the HA's public housing units. While there are a number of federal programs to provide affordable housing for seniors, public housing is the largest single federal program for housing low-income (particularly very low-income) seniors.

As documented by the recent Congressional Seniors Commission and others, as a person ages (particularly those 85 years and older) they generally have an increased need for supportive services and health care. Increasing numbers of seniors who are aging in public

ACRONYMS

AASC	American Association of Service Coordinators
CDBG	Community Development Block Grant
CHSP	Congregate Housing Service Program
E/DSC	Elderly /Disabled Service Coordinators
HA	Public Housing Agency
HHS	Federal Department of Health and Human Services
HCV/FSS	Housing Choice Vouchers Family Self Sufficiency
PH/FSS	Public Housing Family Self Sufficiency
SuperNOFA	Notice of Funding Availability
ROSS	Resident Opportunities and Self Sufficiency



AND PUBLIC HOUSING

housing have a critical need for supportive services to enable them to remain in their home, i.e. to age in place. While generally there are many public and private programs available in the community to provide such services as meals, counseling, transportation, affordable housing, day care, housekeeping and health care, the fragmentation in these programs often makes it difficult for older persons, their caregivers, and others to access them.

In addition to the lack of awareness, the complexities of some of these programs have hindered timely access by many vulnerable elderly residents of public housing. If essential supportive services and health care are not accessed in a timely manner, frail elderly may be at risk of not being able to remain in their home. In response to service needs of the elderly and other special populations, some HAs have hired staff to help link these vulnerable residents with community-

based services. While HAs may have different titles for this position, they are usually referred to as service coordinators.

What is the Role of the Service Coordinator?

The role of a service coordinator is to assist frail seniors and other special populations to identify and link them with a wide range of community services. Without access to suitable and affordable options, many may be forced to move prematurely to a more costly living situation, such as a nursing home. Service coordinators are increasingly recognized nationwide as the vital linchpin in linking older persons with essential community supportive services. They have helped thousands of low-income elderly and others with their health and supportive service needs, thus enabling them to age in place and remain in their home and community.

HAs have long recognized and appreciated the invaluable role that service coordinators play in helping the elderly and persons with disabil-

"The benefits of Service Coordinators are innumerable. (They) offer educational workshops, provide counseling, have knowledge of services available in areas, offer support in times of need, assist with applications for available services, and act as a liaison between building management and residents. The Service Coordinators in our Agency stay extremely busy as they are available for any resident in their assigned communities, not just the residents on an 'active' caseload."

- Jacksonville Housing Authority, Fla.



PORTLAND

CHSP Struggling to Survive to Assist Frail Elderly

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The Housing Authority of Portland, Ore. (HAP) has one of the nation's longest operating and most successful Congregate Housing Service Programs (CHSP). HAP is the largest provider of affordable housing in the state of Oregon, offering a variety of housing options, including 3,900 housing units in 32 properties, 2,400 units of public housing in 19 buildings, and 8,000 Section 8 rent assistance vouchers. HAP was one of the original CHSP grantees and has been able to continue its operation since 1981; it is also one of the few HAs funded in the second-phase CHSP program.

The CHSP program operates in four of HAP's ten mixed population high rises. Through CHSP funds, HAP has staffed three Service Coordinators, and provides one meal seven days a week, as well as a range of services that are contracted out, such as housekeeping, transportation, senior companion, personal care, wellness clinics and podiatry care. The first-phase of CHSP provides 30 slots in one building; while the second phase provides 90 slots. At all sites HAP is responsible for 50 percent of the costs and collects 10 percent of program cost from the average of one hundred CHSP participants. Through collaboration with Multnomah County and the State Department on Aging, HAP has been able to secure Medicaid waiver funds for the required

"A key concern throughout the quarter century history of our successful CHSP program has been our ongoing struggle to survive the various waves of federal, state and local funding cuts. We need to develop sustainable funds for Service Coordinators to enable effective linkages with essential support service needed by our frail and vulnerable residents."

*Veronica Sherman King,
HAP Director of Resident Services*

CHSP match. However, recent cuts in the state's Medicaid program have provided challenges for HAP since there are few if any alternative sources of funds for the required match. The program is very successful and has waiting lists through "word of mouth" and referrals by the Area Agency on Aging.

In addition to CHSP, there are several other HAP programs that staff Service Coordinators and provide or link residents with services, including the ROSS Resident Service Coordinators for Elderly and People with Disabilities, PH and HCV Family Self-Sufficiency (FSS) programs, and through HOPE VI grants and Homeownership programs. Additional information on the HAP CHSP program is available at: www.hapdx.org/business/pdfs/0608-Addendum1.pdf and from HUD's Senior Housing Information Center at: www.hud.gov/offices/pih/pihcc/holgatehouse.ppt

ities remain independent, as well as helping families become more self-sufficient. The critical issue for many HAs, however, is how to secure the necessary funds to staff sufficient numbers of service coordinators to effectively assist the elderly and others with special needs. A recent NAHRO survey indicated that half of the HA respondents did not have a service coordinator staff position, even though nearly 82 percent believed that there was either a great or moderate need for them.

Where to Obtain Adequate Funding for Public Housing Service Coordinators?

Even though there are a number of potential public and private funding sources for staffing service coordinators, most of these funding sources are scarce, competitive, short-term, uncertain, complex and inadequate to sustain service coordinators as a routine part of sound management of public housing for the elderly and others with special needs. HAs have had to struggle to piecemeal together bits and pieces of short-term and uncertain funding sources. Through sheer perseverance and creativity, some HAs have been able to patch together a quilt-like arrangement of ongoing funding for their service coordinator(s). Sources that have been used to fund service coordinators include federal funds through HUD, such as ROSS, FSS, CHSP, HOPE VI, HOME, CDBG, E/DSC, and Operating Funds; funds through the Department of Health and Human Services, such as the Older Americans Act, Medicaid waivers, System Change, and Social Service Block Grants; and funds from other federal agencies, state and local governments, foundations, and private donations.

The Congregate Housing Service Program (CHSP) was the first federal program to provide

grants to public housing authorities (as well as non-profit sponsors of Section 202) to fund service coordinators and a range of non-medical services, including meals (required), transportation and other services to frail elderly and persons with disabilities. The program was established in 1978 (PL95-557) and

revised in 1990. Public housing agencies represented about half of the hundred-plus grantees; however, many HAS have dropped out of CHSP because of difficulties in securing the required match (usually 50 percent). Limited funds (about \$8 million in FY 2007) have been provided to extend existing CHSP

projects (including 19 HAS of the current 75 grantees). No new CHSP grants have been awarded since 1995, and CHSP funds are not available to expand the program. HAS involved with CHSP have extensive long-term experiences with staffing service coordinators and linking services for targeted residents.

RICHMOND

Using Multiple HUD Grants to Assist Elderly in Various Housing Settings

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The Richmond Redevelopment and Housing Authority (RRHA) serves more than 10,000 residents in 4,100 public housing units. These units are located in 16 family housing developments, 9 senior housing developments, and 2,900 units using Housing Choice Vouchers (Section 8) in scattered-sites throughout the city. To assist the nearly 1,000 elderly, RRHA has used a number of HUD grants to enable frail elderly to age-in-place in various housing settings. These settings including 580 senior households in the 9 senior high rises; 538 seniors residing in the seven family developments; and 653 seniors (55+) using Housing

Choice Vouchers (HCV). The average age of older persons in senior housing is 70 years of age with over 90 percent living alone, compared to an average age of 61 for seniors in family housing with about 28 percent living alone; and an average age of 67 for HCV senior households with two-thirds living alone.

To assist frail older persons in senior housing, RRHA secured in 1995, a ROSS Elderly and Disabled Persons Service Coordinator (E/DSC) grant. The grant enables RRHA to hire Service Coordinators to assist frail elderly in linking with various community services. In FY2004, the E/DSC program was shifted by HUD from the ROSS program to the Public Housing Operating Fund. Since RRHA had received E/DSC funds in 1995, it has been one of the approximate 130 HAS that have been able to extend their existing program.

Over the past few years, E/DSC grants have been reduced contributing to a reduction in the number of Service Coordinators from seven to currently only three based in part on other RRHA priority needs. In addition,

RRHA has received Public Housing Family Self-Sufficiency (PH/FSS) grants to assist families and elderly, and Housing Choice Voucher Family Self-Sufficiency (HCV/FSS) grants. Even though the HCV/FSS program is primarily for families, many seniors benefit from HCV/FSS programs such as the Hope for Healthcare program. Many of RRHA's social, recreational and supportive services can be obtained in the Calhoun Family Investment Center, a one-stop center offering a range of services from City and other community agencies, including health screening by the Richmond Health Department.

In response to a critical shortage of nursing aides, a partnership between RRHA and the YMCA trains public housing residents for a career as nursing aides. The award winning nurse aide education program, "Hope for Healthcare" includes funding from the HOPE VI and FSS programs. Counselors arrange for transportation, child-care, and other supportive services to assist residents with their nursing aide training and career goals. Not only does the program assist low-income public housing families to gain economic self-sufficiency, but also helps to provide nursing aide staff needed by frail elderly and others. Information on the "Hope for Healthcare" program is available at: www.rrha.org/html/hope6/healthcare.shtml Information on RRHA is available at www.rrha.org.

"Service Coordinators have proven to be an extraordinary resource linking essential community services to seniors. and have particularly been a life-saver to many isolated older persons. There is a critical need to sustain ongoing funding for Service Coordinators since it is difficult to plan with multiple short-term and uncertain federal funds."

Joe McGreal, RRHS Grants Manager

CHICAGO

Sustaining Funds for Service Coordinators to Link Senior Services

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The Chicago Housing Authority (CHA) is actively involved in a fifteen-year comprehensive Plan for Transformation to improve the quality and culture of its nearly 25,000 units of public housing, including 9,500 units reserved for senior citizens. The Transformation Plan, approved by HUD in 2000, is a blueprint to renew the physical structure of CHA properties, to promote self-sufficiency for public housing residents, and to reform CHA management. CHA provides affordable housing for approximately 139,000 residents through family housing, senior housing, and scattered site with Housing Choice Vouchers. The comprehensive \$1.56 billion Transformation Plan is funded with City General Funds, Hope VI, Section 8 and other federal and state funds, and private funding. The CHA Transformation Plan represents the largest overhaul of public housing in the nation's history.

As part of the Transformation Plan, CHA will rehabilitate approximately 9,500 senior housing units and provide supportive service in each of its 55 senior buildings. As a means to improve the quality of life and management of suitable and



“Chicago’s Plan for Transformation is about making sure that families, and particularly seniors, who live in public housing units are integrated into the fabric of Chicago. Integration happens on a physical level, so the CHA’s buildings need to be a part of the larger community, but integration also happens on an economic and social level. It is important that seniors are connected to the city’s resources as well as the cultural and social vibrancy of the city.”

*Donna Dixon,
CHA Director of Senior Programs*

affordable housing for seniors, the City designated in 2005, as part of the Transformation Plan, 55 buildings as “senior housing” and restricted future admission to persons aged 62 and older (younger disabled persons were given an option to remain or use Housing Choice Vouchers to move to more suitable housing). The \$500 million renovation of senior housing will be completed this year, and include individual apartment renovations, enhanced community space for services, improved access, and other interior and exterior

market appeal improvements.

The Resident Service Coordination Program provides on-site Resident Service Coordinators (RSC) to all CHA senior buildings. The goal of RSC is to “significantly improve the residents’ quality of life, ensuring accessibility to services they need and for which they are entitled, along with providing recreational and cultural activities within the building to decrease isolation. Through these services, senior citizen public housing residents are able to ‘age in place,’ that is to remain independent and live in their own apartment as long as possible.” CHA has decided to contract out both the management of the senior housing buildings, and staffing of the Service Coordinators. The objective is to partnership with other City departments, as well as with other public and private agencies that have experience, expertise, and a mission for linking services for public housing senior residents. Senior residents can choose to participate in the program, including an initial assessment of need to develop a care plan. In the first phase of the program, CHA collaborated with the City’s Department on Aging (an Area Agency on Aging) to staff RSCs in 42 of the senior housing buildings. The City and CHA have other programs to promote linkages with services, promote self-sufficiency, and for Service Coordinators to assist elderly and family public housing residents.

For additional information on the program, please see the CHA website: www.thecha.org/housingdev/senior_housing.html.

Are There Existing Federal Grants to Fund Public Housing Service Coordinators?

There are two primary federal grant programs that HAs can use to staff service coordinators: Resident Opportunities and Self Sufficiency (ROSS) and Family Self-Sufficiency (FSS). Both of these program funds are available through annual, short-term, targeted, competitive grants administered by HUD that can assist elderly, as well as persons with disabilities and families, residing in public housing or using Section 8 vouchers.

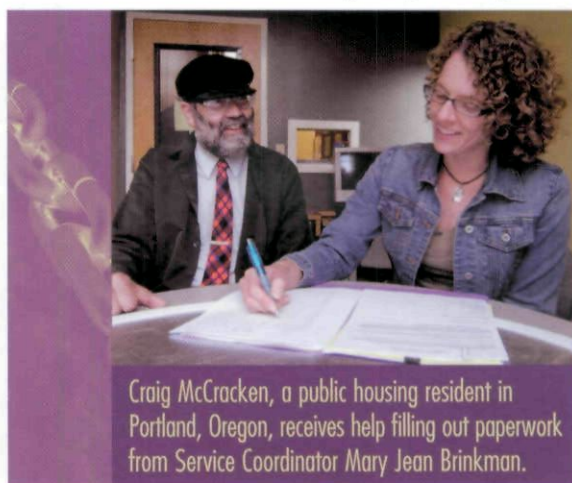
Resident Opportunities and Self Sufficiency (ROSS) – The ROSS program provides competitive grants to public housing authorities, and others, to link elderly and disabled residents to services that can help them continue to live independently, as well as grants to support linking public housing residents with job training, supportive services, resident empowerment activities, and assistance in becoming economically self-sufficient. There are a number of separate programs within ROSS that have been restructured as ROSS evolved. While consolidated under ROSS, these programs have separate NOFAs. In FY 2003, ROSS was restructured from CDBG to the Public Housing Capital Fund. In FY 2004 HUD shifted the Elderly/Disabled Service Coordinator program from ROSS to the Public Housing Operating Fund (Notice PIH 2003-22), and shifted the Public Housing Family Self-Sufficiency (PH/FSS) program from Operating Fund to ROSS. In March 2007, HUD announced the FY 2007 NOFA for the Elderly and Persons with Disabilities (\$20 million) to fund service coordinators and supportive services to assist elderly and persons with disabilities residing in public housing. The other two ROSS

programs in the FY 2007 NOFA are Family and Homeownership (\$30 million) and Public Housing Family Self-Sufficiency (\$12 million). Despite the critical need for service coordinators and other ROSS programs, funding for ROSS has been cut over the past few years and the administration's FY 2008 budget seeks no new funds for ROSS.

Family Self-Sufficiency (FSS) – The FSS program provides competitive grants to HAs to promote employment, increase savings, and enhance economic independence and self-sufficiency. There are two separate FSS programs: the Housing Choice Voucher (HCV/FSS) program, targeted to participants (approximately 63,000 families) with Section 8 vouchers, and a separate program for public housing residents (PH/FSS) with approximately 8,300 families. The National Affordable Housing Act of 1990 that established the program specified "HUD shall provide for the inclusion under the performance funding system under section 9 of ...eligible administrative costs (including the costs of employing a full-time service coordinators)...." (Section 554). HAs can staff coordinators to link FSS families with training opportunities, job placement organizations, and local employers, as well as assist participants to access support services, such as child care, transportation, credit counseling and education. Each FSS participant works with a case manager who helps them develop and fulfill a five-year action plan to become more self-sufficient, including the establishment of an interest-bearing escrow account. In FY 2004, HUD made a number of changes with the structure and allocation of FSS funds. For the HCV/FSS program

changes were made to more actively promote homeownership, and HUD shifted the PH/FSS program from the Public Housing Operating Budget to the ROSS program (PIH 2003-22). Funding for the HCV/FSS program has remained essentially flat-funded at \$48 million for the past few years (although about one-third of the 771 HAs that participated in the HCV/FSS program were not funded due to technical problems with their application), and no FY 2008 funds are requested for ROSS, which now includes the PH/FSS program.

Confusion over some of the program realignment, the shifting focus of the various ROSS and FSS, as well as significant funding shortfalls, have contributed to disincentives for some HAs to apply for funds; they have also contributed to some HAs' proposals being rejected based on technical errors. Nonetheless, these two grant programs provide an opportunity for HAs to secure much-needed funds to staff service coordinators. The specific HUD programs that HAs may seek for service coordinators may depend upon a

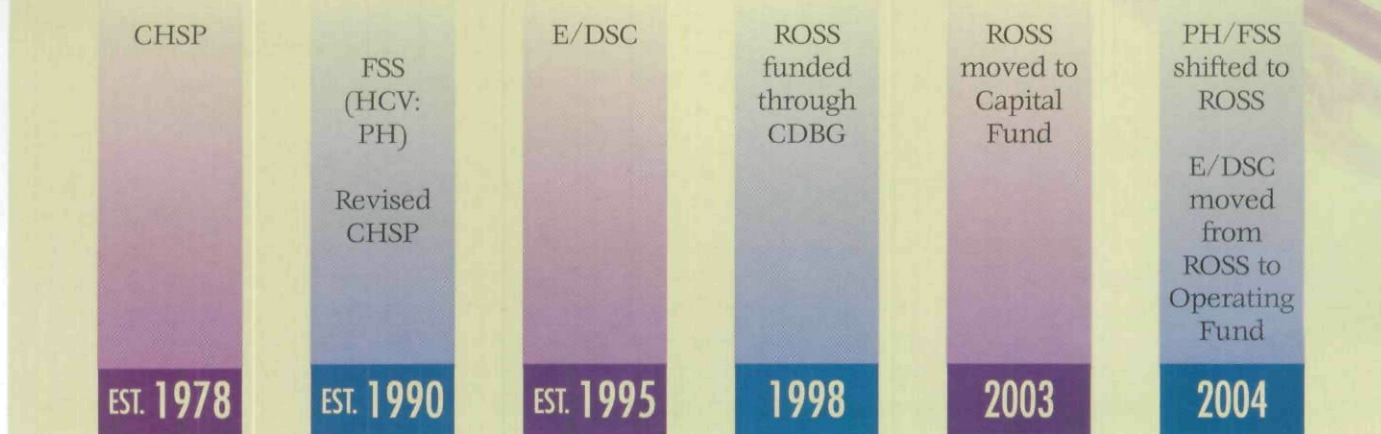


Craig McCracken, a public housing resident in Portland, Oregon, receives help filling out paperwork from Service Coordinator Mary Jean Brinkman.

RICHARD WILHELM, HARE IN THE GATE PRODUCTIONS, LLC

resident's place of residency and service needs – e.g., whether the HA is trying to assist the elderly residing in housing specifically designated for seniors (and/or mixed population with persons with disabilities), for seniors living in

SERVICE COORDINATORS IN PUBLIC HOUSING FUNDING *Timeline*



family housing, or seniors using Housing Choice Vouchers (Section 8) in scattered-site housing.

Although we tend to think of seniors primarily residing in "senior housing," many HAs have significant numbers of seniors residing in family housing, including many seniors who moved into family housing when they were younger, raised their family and now have aged in place and chose to remain in their home. A recent study of the Boston Housing Authority (BHA) revealed that nearly 40 percent of seniors living in BHA housing developments reside in family housing rather than senior housing; and have lived in the same development for 30 years or more. Therefore, HAs seeking funds for service coordinators will need to develop multifaceted strategies for funding based on the type of housing setting in which their elderly are aging.

Can Service Coordinators Be Funded Through Public Housing Operating Budgets?

The National Affordable Housing Act of 1990 (PL101-625) authorized the staffing of a service coordinator through the Public Housing

Operating Budget. As specified in the Act (Section 507(b)(1)(B)), "...any public housing agency for any project with a sufficient number of residents who are frail elderly or persons with a disability may be used with respect to...the cost of a management staff member to coordinate the provision of any services within the project provided through any agency of the Federal Government or any other public or private department, agency or organization...to enable such residents to live independently and prevent placement in nursing homes or institution." However, the conferees for the Act specified, "the cost of a service coordinator is an eligible cost to be paid out of public housing operating subsidies but is not required and is not a separate authorization." The act also authorizes HAs to fund up to 15 percent of the costs for the provision of services such as meals, housekeeping and chore assistance, personal care, laundry assistance, transportation services and health-related services. A few years later, Congress sought to address the mixed population issue and to ensure linkages of services for frail elderly and for persons with disabilities by expanding the staffing of service coordinators to public and

other federally assisted housing (previously only authorized for Section 202 elderly housing and Section 811). Section 661 of the Housing Act of 1992 authorized new budget authority under Section 5(c) of the 1937 Housing Act of \$30 million to staff service coordinators in public housing. The statute provides that "amounts made available under this clause shall be used to provide additional annual contributions to public housing agencies only for the purpose of providing service coordinators and services under this clause for public housing projects."

As previously noted, in FY 2004 HUD shifted the Elderly/Disabled Service Coordinator (E/DSC) funding to Public Housing Operating Funds; yet, funding is eligible only to those HAs that were recipients of an E/DSC grant in 1995. There are approximately 130 HAs that currently are funded through the E/DSC program, and they may be renewed annually provided that sufficient funding is appropriated and that the HAs meet the annual competitive requirements. The E/DSC objective is to assist elderly and persons with disabilities to continue to live independently without having to move to more expensive assisted care environments. Grant funds may be

used to pay for the staffing of service coordinators who are responsible for such actions as working with community service providers to tailor services to the needs of eligible residents, establishing a system to monitor and evaluate service delivery and outcomes, and coordinating with other independent living programs.

HUD also changed the requirement for HAS to include the Elderly/Disabled Service Coordinator in their PHA Plans. PHA Plan regulations (24 CFR Part 903) permit HUD to request other information in addition to the required plan components. HUD is undertaking efforts to streamline rather than expand PHA Plan submission requirements, so HAS will not be required to include the E/DSC Program in their PHA Plan. Instead, HAS will need to provide support for the subsidy amount entered on Part D, Line 3 of form HUD-52723, Calculation of Operating Subsidy, in Section 3, Remarks, of the same form or as an attachment to the form.

However, the existing E/DSC coordinators now need to compete with other critical operating budget priorities, and are subject to the same proportional cuts with Public Housing Operating Funds. Furthermore, HAS with E/DSC funding are not eligible to apply for the ROSS Elderly/Disabled program. HUD has indicated that it will not provide funding for any new E/DSC programs. Unfortunately, many HAS have not been able to include new or continued funding for service coordinators due to cuts in their operating budget over the past few years. For FY 2007, the 110th Congress restored some additional Public Housing Operating Funds and identified service coordinators among critical needs. However, the conferees acknowledged that HUD was funding public housing agencies at 76 percent of their operating budgets. NAHRO projects

a \$1 billion shortfall in FY 2008. Therefore, staffing service coordinators has to compete with other pressing needs for limited public housing operating funds; and HAS must seek other means to sustain ongoing funds to staff service coordinators.

Other Sources of Funds for Service Coordinators

Some cities and states have developed affordable housing funds, used tax incentives, and general funds to develop and operate affordable housing for seniors and other special populations, including actions to staff service coordinators and promote linkages between affordable housing and community-based services. For example, the City of Chicago, as part of its 15-year Transformation Plan for public housing, has undertaken a multifaceted strategy to renovate and improve access to services for seniors, and to include the staffing of service coordinators for each of its public housing senior housing facilities.

While there may be an emerging recognition of the need for suitable and affordable housing for increasing numbers of elderly, including the staffing of service coordinators, HAS are caught in a financial squeeze between the competing needs of the elderly and other special populations compared to other priorities and pressing needs. This situation is exacerbated by the flat-funding or significant cuts in recent years with various federal funds for public housing. These cuts affect specific grants such as ROSS, FSS, Hope VI; formula-based funds such as CDBG, HOME and CDBG; and particularly the Public Housing Operating and Capital Funds. Because of federal funding cuts, a number of HAS have been forced to layoff or reduce their service coordinator programs. This action—necessary given the funding limitations of HAS—is counter-productive

for broader national economic policies for self-sufficiency and long-term care policies that seek to enable frail elderly and persons with disabilities to be more independent and to avoid premature admission to more costly settings.

During Hurricane Katrina and other national disasters, service coordinators also demonstrated the critical role that they can play in helping the elderly and other vulnerable populations to prepare for and successfully survive natural and other types of emergencies. Service coordinators have not only been able to improve the quality of life for the elderly and others, but also save public funds by delaying or avoiding costly nursing home. However, HAS and HUD do not directly benefit or receive any of the public funds saved through these housing-linked-with-services actions. Therefore, it is sound public policy to increase public investment of limited federal funds in service coordinators to ensure their routine staffing as part of sound management of public housing. NAHRO is collaborating with the American Association of Service Coordinators (AASC) to expand sustainable federal funds for Public Housing Service Coordinators.

Larry McNickle has served as a special assistant to NAHRO on senior housing issues. He has extensive experience in public policy for affordable senior housing and related issues. His previous experience includes: Director of Housing Policy for the American Association of Housing and Services for the Aging; Senior Associate for the U.S. Conference of Mayors; and Legislative Assistant to two Congressional Members. He was instrumental in the establishment of the American Association of Service Coordinators and served as a charter Board member. He has received numerous awards in recognition of his leadership on behalf of older persons. ■

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