Introduction
For the elderly, "aging-in-place" has become a term used to describe the increasing age of residents in federally-assisted, public housing and other affordable housing communities. Longtime residents have aged in their residences with the risk of becoming more frail.

For families, “self sufficiency” has become a term used to describe the family’s non-reliance on subsidies and/or other public supports to maintain a job, housing or other basic needs of daily life. For low income families trying to rise out of poverty, there may be barriers that hinder these efforts.

Historically, resident managers, who were hired to address the business and maintenance aspects of their housing community, found themselves dealing more and more with complex social and personal resident problems. While resident managers have often been involved extensively in coordinating services for residents, they often lack the time and available resources needed to perform this service, or may not have the educational background sometimes required for complex resident issues.

It is the mission and policy of this housing organization to assist its residents in maintaining or achieving a self-reliant lifestyle. Further, the U.S. Department of Housing and Urban Development (HUD) has responded to this need providing for service coordinators in selected HUD programs. Additionally, state/local housing finance entities may provide tax incentives to affordable housing developers that include a service coordinator program as part of their housing development.

Service coordinators are persons with the background and training to assist in the identification of resident needs and the accessing of community services and support systems to address these needs.

Purpose of the Memorandum of Understanding (MOU)
The property manager and service coordinator are both professionals whose special positions enhance the lives of residents and add to the welfare of the housing community as a whole. The property manager is responsible for the healthy operation and maintenance of the entire housing community as well as the safety and security of the residents. The service coordinator expedites service management within the housing community. Each should consider the other as part of the facility team, with the understanding that each has separate identifiable roles.

Each has specific responsibilities which are outlined in the following "Memorandum of Understanding" (MOU). This agreement outlines most of the responsibilities of each participant as it pertains to the service coordinator position at this facility. However, the management company and/or owner of the property may use this document in accordance with company policies as long as they do not counteract HUD’s administrative policies.

As with other contracts or agreements affecting the community, the property manager has broad oversight of implementing them and this includes the service coordinator program "Memorandum of Understanding". The property manager may not be responsible for the direct supervision of the service coordinator, still they are responsible to see that the content of this agreement is being responsibly managed and enforced.
The management team (including all appropriate staff) will participate in an orientation of the service coordinator program before implementing this "Memorandum of Understanding".

The Service Coordinator will:

- Provide hours of service to the housing facility
- Participate in orientation of the service coordinator program
- When possible and appropriate, will participate in training
- Follow and abide by housing authority/organization/facility rules
- Become familiar with housing industry regulations surrounding tenancy, Fair Housing, and 504 regulations (reasonable accommodation)
- Inform management of any resident incident or issue which adversely impacts management or the safety and security of other residents or the building
- Maintain an office in the facility
- Communicate with manager(s) about changes in residents’ condition that does not compromise resident privacy
- Ensure confidentiality of resident files including the acquisition of a 'release of information' form from residents
- Meet at least weekly with the manager to review work activities and # of residents being served
- Complete and distribute appropriate reports in a timely fashion and document appropriate information in resident files
- Inform management of resident problems that interfere with the safety or security of the building
- Report any suspected cases of abuse, neglect or exploitation of a resident to appropriate agency
- Advise residents and families of community resources, services and service options but not compel residents to accept their services or the services of outside providers
- Link residents, as requested, to appropriate community services
- Monitor the effectiveness of services and inform management of any concerns.
- Report problems of service providers to the appropriate agency
- Advise management of the potential changes in a resident's condition which may interfere with their residency (decisions involving Long Term Care) or lease violations
- Inform all residents of the availability and purpose of the service coordinator position
- Provide information for reporting to HUD as appropriate

Management will:

- Whenever possible, participate in the evaluation process of the service coordinator
- Meet or communicate regularly (at least once weekly) and on an as needed basis with the service coordinator regarding service management and their awareness of changes in a resident’s condition
- Ensure that the service coordinator does not provide direct services to residents and sees to it that the service coordinator is not involved in the planning or preparation of social or recreational activities of the overall housing community
- Allow the service coordinator access to manager’s resident files on an as needed basis with a release of information from the resident unless specifically prohibited by Federal law or regulation (e.g., EIVS information)
- Inform the service coordinator of changes in a resident's condition that may impact the resident's ability to meet lease obligations
- Introduce the service coordinator to residents, families, and known service providers
SERVICE COORDINATOR AND HOUSING MANAGEMENT
MEMORANDUM OF UNDERSTANDING

- Ensure that the service coordinator will not act on behalf of or in place of the manager
- Advise the service coordinator that they are not to act as a Notary Public nor as a witness to a Health Care Proxy, or Power of Attorney
- Advise the Service Coordinator that they are not to accept valuable gifts from residents or service providers
- Provide (as appropriate) necessary training of the service coordinator
- Participate in setting goals and objectives in relation to facility needs affecting the residents
- Supervises the M.O.U. with communication to the Quality Assurance Administrator as to its' effectiveness and/or suggestions for modification

The Quality Assurance Administrator will:

- Implement the M.O.U. after consultation with the housing management, the property manager and the service coordinator
- Initiate the reporting and policy procedures of the position and see to the adherence of such procedures including HUD requirements by all participants
- Assist in the development of the service coordinator program at each housing community
- Be available for conferencing in unresolved issues facing the service coordinator and management
- Select resident files to review to ensure that the service coordination and follow up monitoring provided is appropriate and in accordance with federal regulations and recommended standards of practice
- Provide guidance on problem-solving methods and service coordination practices
- Recommend and monitor educational opportunities regarding service coordination
- Provide necessary training and orientation of service coordinator and manager, as appropriate, and ensure the service coordinator follows training guidelines, where required

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Prior to signing the 'Memorandum of Understanding,' it is recommended that all parties review the job description of the Service Coordinator as a further clarification of this document.

All parties will meet at least _______ ________ to discuss results achieved and directions for future efforts.

This Memorandum of Understanding is made as of ________________, by and between the following parties:

_________________________________  _________________________
Housing Management                  Service Coordinator

_________________________________
Director of Resident Services (insert appropriate title)