Multifamily Property Managers' Satisfaction with Service Coordination

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Prepared by

Cheryl A. Levine, Ph.D.
Ashaki Robinson Johns, MSW
U.S. Department of Housing and Urban Development
Office of Policy Development and Research
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Executive Summary

This study evaluates the level of satisfaction among property managers with the provision of service coordination that links residents of U.S. Department of Housing and Urban (HUD)-assisted, multifamily housing to needed supportive services. Overall, this study finds a high level of satisfaction with the program and a strong belief among property managers that service coordination improves residents' quality of life. Also, the study finds that service coordination appears to lengthen tenure; the average length of occupancy was 6 months longer among residents of properties with HUD-funded service coordination as compared with residents of similar developments without service coordination. By forestalling or preventing unnecessary institutionalization, service coordination programs help to promote independent living, improve residents' quality of life, and ultimately save taxpayer dollars. The study also explores how residents in developments with service coordinators continue to live independently as compared with residents of developments without formal service coordination.

Background

The U.S. Department of Housing and Urban Development's (HUD's) privately owned, assisted multifamily housing provides an affordable, independent living option for low-income elderly and nonelderly people with disabilities. These residents may require additional assistance to support independent living, such as assistance with housekeeping, personal care, meal preparation, or short-term counseling. Supportive services are provided by a host of community-based and government agencies to residents in their homes. These services are often able to prolong independent living and facilitate aging in place. Through the provision of funding for service coordination, the Department helps frail and at-risk, low-income elderly and nonelderly people with disabilities access the services they need to live independently in their homes for as long as possible.

In 1990, the Cranston-Gonzalez National Affordable Housing Act authorized HUD to administer the Service Coordinator Program (SCP).[1] The program is intended to match low-income elderly and nonelderly people with disabilities living in HUD-assisted housing with necessary services. Goals of the SCP include the following:

- Facilitating the provision of services in federally assisted housing to prevent premature and inappropriate institutionalization.

- Improving the capacity of management to assess the service needs of eligible residents, coordinate the provision of supportive services that meet the needs of eligible residents, and ensure the long-term provision of such services.[2]

Since 1992, HUD has provided guidance for the provision of service coordination as well as additional rent subsidy or grant funds.[3] In this report, the SCP refers to the provision of service coordination using HUD funding (including the HUD grant, operating budget, and residual receipts) in HUD-assisted, multifamily properties that serve the low-income elderly or nonelderly people with disabilities.[4]

A service coordinator is defined as a social service staff person hired or contracted by an owner or management company. Requirements and guidelines for operation of service coordinator programs are specified in the authorizing legislation, Notices of Funding Availability, HUD notices, and handbooks.[5] HUD guidelines are flexible concerning service coordinators' working arrangements—they can be hired directly by the development or be contract employees from another organization, work either full- or part-time, and serve as coordinator for more than one development. HUD guidelines suggest that a full-time service coordinator could serve about 50 to 60 frail or at-risk low-income elderly or nonelderly people with disabilities.

The service coordinator's primary role is to coordinate the provision of supportive services to the low-income elderly and nonelderly people with disabilities to prevent premature and inappropriate institutionalization, thereby improving residents' quality of life. The service coordinator is charged with the following:

- Determining the service needs of eligible residents.
- Identifying appropriate services available in the community.
- Linking residents with the needed services.
- Monitoring and evaluating the effectiveness of the supportive services.
- Performing other functions to enable frail and at-risk low-income elderly and nonelderly people with disabilities to live with dignity and independence.

Service coordinators are specifically prohibited from being assigned responsibility as the project's recreational or activities director, providing support services directly, or assisting with other project administrative work.

As of February 1, 2008, 3,742 multifamily housing developments for low-income elderly and nonelderly people with disabilities were served by HUD-funded service coordinators. The total number of residents in multifamily, HUD-assisted developments with service coordinators was more than 348,000 low-income elderly and nonelderly people with disabilities.

The study found four ways that service coordination could be funded at a multifamily, HUD-assisted development. First, service coordination could be HUD-funded. Second, service coordination could be funded by another state or local government program. Third, service coordination could be supported through volunteerism. Fourth, residents could pay for service coordination independently. Among those developments that offered service coordination, the majority (85 percent) were HUD funded.

Research Methods

The study involved a survey of property managers of SCP-eligible multifamily developments to measure their opinions on the role of service coordination in HUD-assisted housing programs that serve low-income elderly and nonelderly people with disabilities. The Office of Policy Development and Research (PD&R) designed and administered a mixed-methods (quantitative and qualitative) survey to a representative sample of multifamily property managers in the summer of 2007. (See Appendix A for the survey instrument).

PD&R developed the survey instrument in coordination with the Office of Housing. In addition, feedback on survey questions was solicited from experts on service coordination in HUD-assisted housing and during site visits to multifamily properties with service coordinators. The survey was piloted twice and the survey language was adjusted based on measures of reliability and validity of the survey instrument.

The survey was administered by telephone to a nationally representative, random sample of property managers of SCP-eligible multifamily developments during the summer of 2007.[6] The sample was drawn from the universe of multifamily housing developments designated for the low-income elderly and/or nonelderly people with disabilities that receive a project-based rental subsidy (with the exception of Section 811 projects, because there is no statutory authority for these projects to have service coordinators). At that time, the universe was 12,184 eligible properties serving 542,420 residents (see Appendix B for a comparison of eligible property residents with the sample residents).

To compare the effect of service coordination at developments with and without service coordinators, we surveyed property managers. Throughout the report, respondents are reported as "property managers." Occasionally, the property manager could not be reached for the telephone interview. To preserve the integrity of the sample, if the property manager could not be reached after repeated attempts, either another knowledgeable staff member (such as a property management agent or executive director) was interviewed, or the sampled property was recorded as a nonresponse.[7] To obtain a nationally representative sample of HUD-assisted, multifamily housing, a sample size of 384 was determined adequate to achieve a 95- percent confidence interval. Based on pilot testing of the survey instrument, we anticipated a high nonresponse rate (due to difficulty reaching property managers) and thus oversampled from the population. Survey results reflect a total of 363 successfully completed surveys out of a sample size of 653 for a total response rate of 56 percent. The nonresponse bias in the survey appears random; survey responses included slightly fewer Section 202 properties with Section 8 and more Insured Subsidized properties as compared with the nonrespondents (see Appendix C for a comparison of survey respondents with nonrespondents).

The telephone survey collected data at the individual property level. Analysis involved the use of a secondary data set, HUD's Tenant Rental Assistance Certification System (TRACS). TRACS contains data, such as numbers of residents and vacant or occupied

units, at both the property and resident level for all multifamily housing with a rental subsidy contract.

Research Questions

This report attempts to address four overall research questions. First, are properties with service coordinators different from properties without service coordinators? Second, for properties without service coordinators, why do they not offer service coordination to their residents? Third, for properties with service coordinators, what are the perceived benefits? Finally, does having the SCP contribute to independent living and/or aging in place through increasing residents' length of occupancy, thereby preventing premature institutionalization?

Results

To measure the effectiveness of service coordination in HUD-assisted housing, survey administration included a mixture of SCP-eligible properties. A number of different HUD-assisted housing programs are eligible under the SCP: Section 202 with a project rental assistance contract (PRAC), Section 202 without rental assistance, Section 202 with Section 8 (hereafter referred to as Section 202/8), Section 8, Section 236, and Section 221(d)(3) Below Market Interest Rate. Among those surveyed, the largest groups were Section 8 (31 percent) and Section 202/8 (27 percent), followed by properties with both mortgage insurance and rental subsidy (22 percent) and Section 202 with a PRAC (18 percent) (See Table 1).

Table 1. Types of Properties						
	Sample		**Nonresponses**		**Universe**	
Type of Property	**Number of Properties**	**Percentage**	**Frequency**	**Percentage**	**Frequency**	**Percentage**
Section 202/PRAC	65	17.9	49	16.9	1,886	30.3
Section 202 without rental assistance	5	1.4	1	0.3	106	0.9
Section 202/8	98	27.0	98	33.8	3,694	30.3
Section 8	114	31.4	100	34.5	4,150	34.1
Other	1	0.3	4	1.4	190	1.6
Insured Subsidized	80	22.0	38	13.1	2,155	17.7
Total	363	100.0	290	100	12,184	100.0

PRAC = project rental assistance contract.

Among the property managers interviewed, most (73 percent) were responsible for more than one property. For this survey, however, property managers were asked to focus on the property that was randomly selected. Property managers were asked to describe the availability of service coordination at the sampled property. Just more than one-half of the properties provided either SCP or non-HUD-funded service coordination (54 percent) as compared with those that either no longer or never offered service coordination to residents (46 percent). Clearly, the presence of HUD funding (or SCP) was an important

factor in the availability of service coordination. As indicated in Table 2, nearly one-half of the properties surveyed had HUD-funded service coordination (46 percent) compared with almost as many properties (43 percent) that had never offered service coordination to their residents.

Table 2. Service Coordination Available		
Type of Property	**Number of Properties**	**Percentage**
HUD-funded service coordination	168	46
Non-HUD-funded service coordination	29	8
Service coordination no longer available	10	3
Formal service coordination never established	156	43
Total	363	100.0

Most developments paid for service coordination using their operating budget, which corresponds with HUD's preference that property owners include service coordinators' salary in the operating budget. Among those developments with HUD-funded service coordination, the majority budgeted for service coordination as a permanent cost in their operating budget (1,992 developments, or 53 percent).[8] Other HUD-funded service coordination was paid for as follows: 1,541 (41 percent) developments had a HUD service coordinator grant and 209 (6 percent) developments used residual receipts (excess Section 8 rental subsidy), excess income generated in Section 236 developments, or another funding source.[9,10]

As indicated in Table 3, Section 202/8 (30 percent) properties were somewhat more likely to have service coordinators paid with the SCP as compared with Insured Subsidized (29 percent) or Section 202/PRAC (21 percent) properties; nearly one-half (47 percent) of properties with non-HUD-funded service coordination were Section 8.

Table 3. Property Type by Funding Source		
Type of Property	**HUD-Funded Service Coordination (N=168) (%)**	**Non-HUD-Funded Service Coordination (N=29) (%)**
Section 8	19.6	46.8
Section 202/8	29.8	20.5
Section 202/PRAC	20.8	14.7
Insured Subsidized	28.6	16.7
Section 202 without rental assistance	0.6	1.3
Other	0.6	0

PRAC = project rental assistance contract.

Beginning in 1992, HUD made available a supplemental grant program to expand the provision of service coordination. When property managers were asked if they had ever applied for the HUD service coordinator grant program, many said they had not. Among those with HUD-funded service coordination, 53 percent used their operating budget and

therefore did not need the supplemental grant. Of those that had non-HUD-funded service coordination, more than 96 percent had never applied for the HUD grant and more than 80 percent of those that had never established formal service coordination had not applied.

As shown in Table 4, when asked in an open-ended question why they had not applied for the HUD grant, 19 property managers with the SCP reported having other sources of funding, while 11 property managers with non-HUD-funded service coordination reported that services were provided by outside agencies.

Table 4. Have You Ever Applied for the HUD Service Coordinator Grant Program?			
	No (%)	Yes (%)	Do Not Know (%)
HUD-funded service coordination	29.8	64.3	6.0
Non-HUD-funded service coordination	96.6	0.0	3.4
Service coordination no longer available	40.0	60.0	0.0
Formal service coordination never established	80.1	7.1	12.8

In some locations, there were sufficient resources to support service coordination, so HUD funding was not needed. For example, in an open-ended response, one property manager reported,

> "Due to the nature of the on-site management of this development, it has not been necessary. We contract with a local group to provide on-site management and support to the tenants. The on-site management receives funding from the state."

Among the 46 percent of eligible properties where formal service coordination was not offered, there were various reasons why property managers did not apply for the HUD grant. Again, in open-ended responses to the question about why they had not applied, 14 property managers explained that service coordination was provided by outside agencies. Furthermore, 15 property managers stated that their residents did not need service coordination, which may reflect a belief that HUD-assisted housing is for the low-income elderly and/or nonelderly people with disabilities who can maintain independent living without supportive services on site. For example, in an open-ended response, one property manager explained:

> "[I am] not familiar [with the program]. This is independent not assisted living. Residents organize things on their own. I haven't been here long enough to do anything with them. I did have a coffee hour on Friday. If anything is going on, we call the social worker."

Likewise, another property manager shared the perspective that the provision of service coordination was not appropriate in HUD-assisted housing:

"[Service coordination is a] tremendous asset, but potentially detrimental to the well-being of the residents. Some residents really should be in assisted living. Having a service coordinator gives them a false sense of security and independence."

In open-ended responses from developments where formal service coordination was not offered, 35 property managers reported that they had never heard of the HUD grant, 22 described that residents' needs were informally taken care of on site, and 12 specified that they provided service coordination themselves. A property manager explained:

"I'm not really familiar with it. I do most of that. I fill out forms for all of them; some [residents] are on SSI [or Supplemental Security Income], [I] help them get food stamps. It's a small community."

Likewise, 11 property managers at developments without service coordination indicated a belief that their property was too small to merit a service coordinator on staff, while 10 property managers believed that they were not eligible for the HUD grant.[11]

Overall, HUD-assisted housing tends to have high rates of occupancy. As indicated in Table 5, among the HUD-assisted properties represented by the survey, the majority (88 percent) had occupancy rates between 91 and 100 percent. Among properties at the highest rate of occupancy, those with service coordinators had a higher rate of occupancy (at least 92 percent) than properties without service coordination (83 percent). This difference was not statistically significant.

Table 5. Occupancy Rate[12]								
Occupancy Rate (%)	HUD-Funded Service Coordinator Program		Non-HUD-Funded Service Coordination		No Service Coordination		Total	
	Percentage	N	Percentage (%)	N	Percentage	N	Sum	Percentage
41–50	0	0	0	0	0.6	1	1	0.3
51–60	0.6	1	0	0	0	0	1	0.3
61–70	0.6	1	0	0	1.9	3	4	1.1
71–80	1.2	2	0	0	3.2	5	7	2.0
81–90	6.0	10	6.9	2	11.0	17	29	8.2
91–100	91.7	154	93.1	27	83.2	129	310	88.1
Total	100.0	168	100.0	29	100.0	155	352	100.0

Resident Demographics

The SCP is available at HUD-assisted housing developments serving low-income elderly and/or nonelderly people with disabilities. As Table 6 shows, among the properties surveyed, nearly one-half reported serving a mixture of both low-income elderly and nonelderly people with disabilities (48 percent), while many served only low-income elderly residents (45 percent). The higher rate of nonelderly people with disabilities in developments with non-HUD-funded service coordination was likely due to the presence of state Medicaid and/or other sources (state or local departments, agencies, or block grants) that provide funding for supportive services for this population.

Table 6. Type of Residents Served [13]								
Population Served	HUD-Funded Service Coordinator Program		Non-HUD-Funded Service Coordination		No Service Coordination		Total	
	Percentage	N	Percentage	N	Percentage	N	Sum	Percentage
Low-income elderly	53.6	90	48.3	14	34.0	53	157	44.5
Nonelderly people	3.0	5	20.7	6	9.0	14	25	7.1
Both low-income elderly and nonelderly people	43.5	73	31.0	9	57.1	89	171	48.4
Total	100.0	168	100.0	29	100.0	156	353	100.0

Overall, as Table 7 and Table 8 indicate, the majority of residents in SCP-eligible, HUD-assisted developments were White (65 percent), female (71 percent), more than 62 years of age (84 percent), and lived in their HUD-assisted property for 5 to 8 years (63 percent). For those 353 properties in the survey where resident information was available, the average number of residents per development was 60 (with a median of 49).[14]

Table 7. Race and Gender Demographics [15]								
	HUD-Funded Service Coordinator Program		Non-HUD-Funded Service Coordination		No Service Coordination		Total	
	Percentage	N	Percentage	N	Percentage	N	Sum	Percentage
Race and Ethnicity								
White	58.0	6,801	73.3	823	74.0	5,456	13,080	64.7
Black	27.8	3,256	7.9	89	16.8	1,239	4,584	22.7
Hispanic	8.4	979	18.2	204	5.9	433	1,616	4.1
Asian	5.2	612	0.5	6	2.8	208	826	8.0
American Indian	0.6	75	0.1	1	0.5	35	111	0.5
Total	100.0	11,723	100.0	1,123	100.0	7,371	100.0	100.0
Gender								
Female	70.0	8,346	68.0	771	73.0	5,456	14,573	71.1
Male	30.0	3,494	32.0	370	27.0	2,062	5,926	28.9
Total	100.0	11,840	100.0	1,141	100.0	7,518	20,499	100.0

Resident incomes ranged from $0 to more than $63,000 per year. This wide range was attributed to factors such as age, disability status, and geographic locations. The median income for all residents was $10,578, with 75 percent of all residents making less than $14,372 per year.

The average age of residents was 72.15 (with the median age of 74). Although developments without service coordination tended to have a higher percentage of residents less than 62 years of age compared with those with service coordination (20

versus 13 percent), the age distribution for the low-income elderly was similar across the different groups at the time of survey administration.[16]

Table 8. Age of Residents Served [17]								
Age Range	HUD-Funded Service Coordinator Program		Non-HUD-Funded Service Coordination		No Service Coordination		Total	
	Percentage	N	Percentage	N	Percentage	N	Sum	Percentage
Less than 62	13.1	1,560	13.1	167	19.9	1,498	3,309	15.7
62–69	19.3	2,294	14.6	175	19.0	1,429	4,002	19.0
70–74	17.8	2,116	15.3	198	15.6	1,174	3,556	17.0
75–79	18.1	2,153	18.9	216	16.2	1,219	3,676	17.5
80–84	16.0	1,906	17.3	197	15.3	1,146	3,313	15.8
85–89	10.4	1,241	11.3	129	9.5	714	2,132	10.1
90+	5.3	632	5.2	59	4.5	337	1,042	5.0
Total	100.0	11,902	100.0	1,141	100.0	7,517	20,560	100.0

Effect on Length of Occupancy

As noted in the Background section above, the service coordinator's primary role is to coordinate the provision of supportive services to low-income elderly and nonelderly people with disabilities to promote independent living, prevent premature and inappropriate institutionalization, and thereby improve the quality of life for the residents of HUD-assisted multifamily housing developments. One way to test if service coordination is successful at preventing premature institutionalization is to assess how it affects residents' length of occupancy. The average length of occupancy was 6.4 years (with the median length of occupancy being 4.4 years). Controlling for the size of the development, average resident age at the time of entry into the development, and the average income of residents, we found that the length of occupancy at developments with the SCP was 10 percent (more than 6 months) greater than at those developments without service coordination (see Appendix D for the results from the regression analysis).[18] These findings are statistically significant at the 94-percent confidence level. In sum, it appears that residents in developments with HUD-funded service coordination may remain in their own homes roughly 10 percent longer than those residents in developments without a service coordinator.

When the following two factors are combined, the positive effect of service coordination is magnified: (1) service coordination enables residents to live independently in their own homes 10 percent longer, and (2) service coordination translates into a cost savings to taxpayers by forestalling the need for institutionalization.[19]

Service Coordinator Program Satisfaction

The following information compares satisfaction across properties with the SCP (n=168) versus non-HUD-funded service coordination (n=29). Among properties with the SCP, most reported that they paid for service coordination through the HUD grant (50 percent)
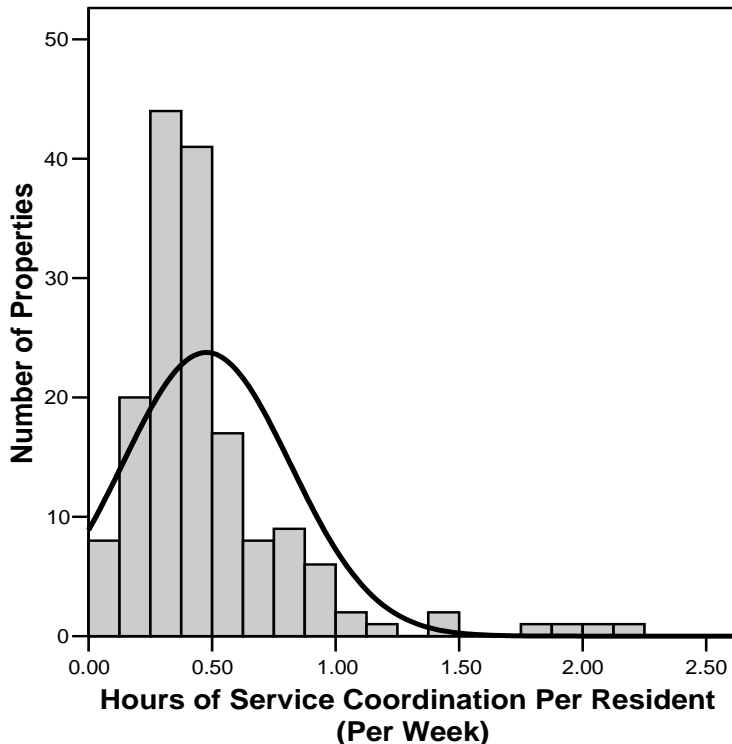
or their operating budget (47 percent). Fundamentally, survey questions on program satisfaction compared the experience of property managers at developments with service coordination against the expectations of those without service coordination. To the extent that there were notable differences between subsets of properties with the SCP, the results are also reported.

Among properties with the SCP, the primary source of funding was equally split between the HUD grant (48 percent) and the operating budget (47 percent). Only a few service coordinators were funded through another HUD resource, such as residual receipts, a combination of operating budget and residual receipts, or the operating budget and some other funding source (5 percent). Among those properties with non-HUD-funded service coordination, the majority (86 percent) indicated that funding was acquired through a state or local Medicaid program (64 percent), private funding sources (21 percent), local volunteers (7 percent), or was paid by the residents (7 percent). Fourteen percent did not know how service coordinator funding was received.[20]

Among properties with the SCP, the median amount of time that a service coordinator was available on site was 32 hours per week, which was significantly higher than at properties with non-HUD-funded service coordination, where the median amount of time that a service coordinator was available on site was 20 hours per week.

In addition, based on the reported number of hours worked by HUD-funded service coordinators, we calculated the ratio of service coordinator hours to the number of residents (see Chart 1).

Chart 1. Service Coordinator Hours per Resident by Property

On average, a service coordinator worked on site a sufficient amount of time to provide 30 minutes of service coordination each week for every resident in properties with the SCP. Although this is a rough calculation, this estimate is consistent with HUD's guidelines, which suggest that a full-time service coordinator can serve about 50 to 60 frail, at-risk low-income elderly or nonelderly people with disabilities.

Among developments with the SCP, 93 percent of service coordinators were directly employed by the property owner or management agent (rather than by another organization), as compared with 55 percent of developments with non-HUD-funded service coordinators.

Only 34 percent of property managers at developments where service coordination was paid for using their operating budget reported ever applying for the HUD grant, whereas, among properties with non-HUD-funded service coordination, 97 percent had never applied for the HUD grant. This trend corresponds with HUD's preference that property owners not depend on supplemental grant funding for the operation of a SCP. Rather, including the service coordinators salary in the operating budget provides a stable and constant source of funding and saves the management staff time they would otherwise use administering and renewing a grant.

Overall, HUD-assisted housing tends to have high rates of occupancy. Within our sample, occupancy rates were higher among properties with the SCP as compared with those with non-HUD-funded service coordination (92 versus 83 percent) for properties at the highest rate of occupancy (91 to 100 percent). Across properties with the SCP, occupancy at those with the HUD grant trended to be slightly higher than those using their operating budget to pay for service coordination (94 versus 90 percent) for those at the highest rate of occupancy (91 to100 percent). In comparison, slightly fewer (83 percent) developments with no service coordination had the highest rate of occupancy (91 to 100 percent).

As Table 9 indicates, among SCP-eligible developments, the majority population served was low-income elderly; however, there was variation between those with the SCP (54 percent) versus those with non-HUD-funded service coordination (48 percent).[21] In contrast, developments with non-HUD-funded service coordination were more likely to serve only nonelderly people with disabilities (21 percent). In response to an open-ended question about other sources of funding, 14 property managers with non-HUD-funded service coordination indicated the availability of state or local Medicaid or another government resources, 5 cited private funding or volunteers, and 2 explained that residents apply for and arrange their own services.

Table 9. Types of Residents Served by Funding Source		
Population Served	HUD-Funded Service Coordination (%)	Non-HUD-Funded Service Coordination (%)
Low-income elderly	53.6	48.3
Nonelderly people with disabilities	3.0	20.7

As indicated in Table 10, regardless of funding source, most developments with service coordination were able to serve all residents. Across properties with the SCP, developments with the HUD grant trended slightly higher than developments using their operating budget in providing service coordination to all residents (94 versus 89 percent).

Table 10. Residents Served by Funding Source		
Population Served	HUD-Funded Service Coordination (%)	Non-HUD-Funded Service Coordination (%)
All residents	91.7	89.7
Low-income elderly and nonelderly members of the community who are not residents of the property	7.7	6.9
Some residents	0.6	3.4

Training on Service Coordination

Property managers at developments with the SCP are significantly more likely to have training on the roles and responsibilities of service coordinators in comparison with those with non-HUD funding; 63 percent of property managers at developments with the SCP received training in contrast with only 16 percent of properties with non-HUD-funded service coordination. Across properties with the SCP, property managers with the HUD grant trended slightly higher than those using the operating budget (65 percent versus 61 percent) in whether they received training on the roles and responsibilities of service coordinators.[22] When asked in an open-ended question where and from whom they received training on the roles and responsibilities of service coordinators, property managers with the SCP were more likely to respond. Examples of sources of training received by property managers are listed in Table 11.

Table 11. Sources of Training by Those With HUD-Funded Service Coordinators		
	Number of Property Managers	Percentage
American Association of Service Coordinators	19	20.2
In-house	17	18.1
Other nonprofit agency	13	13.8
Handbook or manuals	9	9.6
Local or state agency	6	6.4
HUD resources	24	25.5
Total	88	100.0

The presence of training is noteworthy. The influence of a property manager who understands the roles and responsibilities of service coordinators might facilitate a more service-rich environment that prevents premature and inappropriate institutionalization. The fact that property managers at developments with HUD-funding were more likely to receive training and have additional reporting requirements (including training of the

service coordinator) might positively affect residents' independent living and quality of life.

In addition, when asked to what extent they agreed that residents were able to obtain and complete applications for benefits or entitlement programs (such as Medicare or Medicaid, Social Security, food stamps, pensions, etc.), 95 percent of those with the SCP agreed, while only 83 percent of those with non-HUD-funded service coordination agreed. The difference in responses was statistically significant. Likewise, in open-ended responses, property managers indicated that service coordinators played a vital role in obtaining and maintaining residents' benefits. As one property manager explained,

> "[Service coordination] has made our tenants' life a lot
> more pleasant, has provided many entree to entitlements—
> Medicare, SSI, utility bills, etc. Makes their life much
> easier to take."

Quality of Life

The survey included a series of questions that measured property managers' perceptions of residents' quality of life. In order to compare the perceived benefits of service coordination across the sample, the questions were tailored to property managers with and without service coordination. Therefore, the comparison in the following text includes the opinions of property managers with service coordination at their developments against the expectations of what service coordination might provide at developments without it.

Property managers without service coordination who perceived it as unnecessary offered the following explanations: (1) the property manager took care of their residents' service needs themselves, (2) service coordination was considered a duplication of services available in the local community, (3) too few services were locally available from which a service coordinator might effectively link residents, or (4) their residents did not need this type of assistance.

Across the quality of life questions, responses from property managers with service coordination reflected a stronger belief that it positively affected residents, which is to be expected. Two responses to questions, however, were notably strong: one regarding the extent to which residents obtained needed services and the other indicating that service coordination improved quality of life.

First, when asked their perception on the extent to which service coordination had enabled (or would enable) residents to obtain needed services, the majority of property managers at developments with either the SCP or non-HUD-funded service coordination (95 percent and 86 percent respectively) generally agreed. In comparison, when property managers of developments that never had service coordination were asked the same question, more than one-half of their responses were positive (55 percent), yet just more

than one-fourth (26 percent) generally disagreed that a service coordinator would enable residents to obtain needed services. (See Table 12.)

	HUD-Funded Service Coordination (N=168) (%)	Non-HUD-Service Coordination (N=29) (%)	Service Coordination No Longer Available (N=10) (%)	Never Had Service Coordination (N=156) (%)
Table 12. Residents Obtain Needed Services				
Strongly agree	79.8	62.1	50.0	24.4
Agree	15.5	24.1	30.0	30.8
Neither agree nor disagree	2.4	6.9	20.0	18.6
Disagree	0.6	3.4	0	23.1
Strongly disagree	1.2	0	0	2.6

In addition to benefiting residents, several property managers indicated that the presence of the service coordinator made their job easier. Through the division of labor, property managers were able to rely on service coordinators to care for residents' social service needs while they attended to the development's administrative work. Property managers listed several benefits provided by service coordination to the operation of their development, including reduction of vacancies, help with annual recertification of residents, and assistance with discharging residents when the need arose for a higher level of care. One property manager described the program as follows:

> "It's a fantastic program—she can help people understand things, written documents, social security mail—in that area she helps them out tremendously. [Otherwise,] I would be here all day and I don't have time for it."

Likewise, another property manager remarked on her ability to do a better job thanks to service coordination:

> "It has taken a load off the management. I go back 20 years in this business. In those days, a property manager used to do it all. Residents came to me for everything, social services was a big part of it! Residents with special needs require special attention."

Also, property managers described that, as resident advocates, service coordinators are equipped to deal with confidential issues. For example, a property manager explained that service coordinators intervened in health-related issues on behalf of residents:

> "With the healthcare situation—service coordinators figure out Medicare benefits; assistance with getting medicine paid. With new laws, service coordination is helpful in alerting adult protective services of situations. Sometimes residents are overmedicated. They notice changes in the

person's personality. The service coordinator can intervene, they can get past the HIPAA/privacy laws if tenants can sign confidentiality releases. The service coordinator has more leeway than the manager and has more time to have private conversations."

Property managers without service coordination perceived that the presence of a service coordinator would help streamline their operation. They recognized that their development might operate differently if a service coordinator were on staff. A few noted that a service coordinator would "take the pressure off" management by providing a "back up" staff member to deal with residents' supportive services needs. For example, one property manager without service coordination said, "If we had such a person, we would have higher occupancy. We just don't have that many elderly residents." Even among property managers at some developments without service coordination, it was perceived as facilitating aging in place.

Although several property managers at developments without service coordination did not offer additional insights because they simply were not familiar with the program, some property managers at developments without service coordination expressed concern that it would create a duplication of services. For example, one property manager advised the following:

> "Check with other services available in the area. This is a small city and the Office of the Aging is available to help tenants or refer them to the appropriate person. I would not like to see more duplication of services if it is not necessary."

Table 13. Service Coordination Improves Residents' Quality of Life				
	HUD-Funded Service Coordination (N=168) (%)	Non-HUD-Funded Service Coordination (N=29) (%)	Service Coordination No Longer Available (N=10) (%)	Never Had Service Coordination (N=156) (%)
Strongly agree	78.0	62.1	10.0	26.9
Agree	16.7	27.6	10.0	27.6
Neither agree nor disagree	3.0	3.4	10.0	21.2
Disagree	1.2	3.4	10.0	21.2
Strongly disagree	0.6	0	0	2.6

When asked, "to what extent do you agree that a service coordinator has improved (or would improve) the residents' quality of life?" again, the majority of property managers at developments with service coordination (95 percent of those with SCP and 90 percent of the non-HUD funded) generally agreed as compared with those that never had service coordination (49 percent). Among property managers at developments that never had service coordination, 23 percent generally disagreed that a service coordinator would improve residents' quality of life. (See Table 13).

Similar to their opinions on aging in place, the opinions of several property managers at developments with service coordination also described enhancements to residents' quality of life. Property managers "couldn't say enough" about the ways that service coordinators helped residents "in all aspects of their life." One explained, "The position is a huge asset and the quality of life would diminish significantly without a service coordinator. [It is a] huge help to both management and residents."

Paralleling the views expressed by property managers at developments with service coordination, some of those at developments without service coordination perceived that service coordinators would positively affect residents' quality of life. One described their belief that "service coordination would provide a better atmosphere and better morale among residents and staff."

In response to the open-ended question about the effect of service coordination on residents' quality of life, 22 property managers at developments without service coordination indicated that they take care of service coordination themselves. One property manager explained, "We are small. We are able to get people the services they need, refer them to appropriate agencies." In addition, 20 property managers at developments without service coordination explained that they refer residents to appropriate services in the community, 12 stated that either their property or community was too small to benefit from the program, 9 indicated that their residents are largely independent or self-reliant (and therefore do not need service coordination), and 7 said that funding either had been or continued to be an obstacle to implementing service coordination.

In addition, property managers were asked what other aspects of service coordination positively affected residents' quality of life. In general, property managers commented that the provision of service coordination benefited their residents. Specifically, among property managers at developments with the SCP, several perceived service coordination as providing critical support to residents. For example, one property manager said the following:

> "[Service coordination is] indispensable because seniors don't know about the services available. The service coordinator becomes a trusted confidant who empowers the residents."

Likewise, another property manager described the service coordinator as providing vital social and emotional support, as follows:

> "They use her just as an ear—if they are depressed, have had a fight with their daughter. [The service coordinator provides] tremendous emotional support for these people to feel better. They get personal attention."

As Table 14 shows, most respondents agreed that service coordination enables residents to age in place; in particular, property managers at developments with the SCP responded very positively (99 percent overall agreement).

	HUD-Funded Service Coordination (N=168) (%)	Non-HUD-Funded Service Coordination (N=29) (%)	Service Coordination No Longer Available (N=10) (%)	Never Had Service Coordination (N=156) (%)
Strongly agree	65.5	55.2	50.0	31.6
Agree	32.7	31.0	40.0	59.4
Neither agree nor disagree	0.6	6.9	10.0	4.5
Disagree	0.6	3.4	0	4.5
Strongly disagree	0	0	0	0

Table 14. Residents Age in Place

As noted earlier, regression analysis supported this observation by property managers. The regression analysis showed more than a 6-month (6.326) increase in the average length of occupancy for developments that had the SCP relative to those without service coordinators.

Another quality of life topic that emerged during interviews with property managers was that service coordinators facilitate independent living. Several property managers with service coordination at their developments provided additional information to demonstrate this benefit. For example, a property manager said, "I think it helps with their sense of security and feeling that they can live independently; they have someone to talk to when they need it." Several property managers with service coordination at their developments recognized the importance of an onsite advocate, akin to a social worker, who provides residents a sense of security, well-being, and reinforced peace of mind in knowing that they can live independently. Many described the value provided to residents in "knowing there is someone they can talk to" who can help navigate complicated systems and has information "at her fingertips" to link them with needed supportive services.

In addition, some property managers indicated that service coordinators advocated for physical changes to the development that benefited residents. For example, one property manager said the following:

> "Here's an example: the building did not have a bus stop; the service coordinator worked with residents and management to advocate with local decision-makers to get a bus stop in front of the building."

Ultimately, having an advocate for residents was characterized by property managers as promoting independent living and aging in place. One manager described this quality of life for residents, as follows:

> "Staying longer is really key. Without a service coordinator, we would be a senior apartment building with little or no services. Management is not the advocate for the resident. They are not linking the resident with services outside the building."

As indicated in Table 15, most property managers agreed that service coordination enabled residents to remain self-reliant (98 percent SCP, 94 percent non-HUD-funded, and 90 percent never had service coordination). In addition, many property managers that previously had a SCP perceived the benefits for residents. For example, one property manager whose service coordinator recently moved on, said the following:

> "[Having a service coordinator could provide] peace of mind for many home-bound residents...Many tenants at [our development] also have mobility issues. Some tenants suffer confusion and could use the attention of a service coordinator."

Table 15. Residents Are Self-Reliant				
	HUD-Funded Service Coordination (N=168) (%)	**Non-HUD-Funded Service Coordination (N=29) (%)**	**Service Coordination No Longer Available (N=10) (%)**	**Never Had Service Coordination (N=156) (%)**
Strongly agree	69.0	58.6	40.0	25.0
Agree	29.2	34.5	40.0	64.7
Neither agree nor disagree	0.6	3.4	10.0	4.5
Disagree	0.6	0	10.0	5.1
Strongly disagree	0	0	0	0

Table 16 shows that most respondents agreed that service coordination promoted social interaction among residents (97 percent SCP, 90 percent non-HUD funded, and 79 percent never had service coordination).

Table 16. Residents Have Access to Social Interaction				
	HUD-Funded Service Coordination (N=168) (%)	**Non-HUD-Funded Service Coordination (N=29) (%)**	**Service Coordination No Longer Available (N=10) (%)**	**Never Had Service Coordination (N=156) (%)**
Strongly agree	61.9	69.0	50.0	30.1
Agree	34.5	20.7	20.0	48.7
Neither agree nor disagree	1.2	6.9	0	6.4
Disagree	1.8	0.0	20.0	14.1
Strongly disagree	0	0	10.0	0

Some saw the role of the service coordinator as facilitating social cohesion among residents and staff and keeping residents engaged. For example, a property manager described the effect of a service coordinator on social interaction:

> "The residents are more involved. There's an improvement in their health because we can offer aerobics and exercise classes. They have an increase in mobility; they were used to living in isolation in their apartments, now they have regular activities."

Another example of providing support to residents involved improved communication. A property manager explained that, through the efforts of the service coordinator, overcoming language barriers helped facilitate social cohesion among residents:

> "About 50% of [our] population is Korean and Korean-speaking. The other half is African-American. The service coordinator has organized language assistance. The service coordinator helps to create a [positive] atmosphere for residents."

Furthermore, property managers commented that residents benefited from improved communication among each other, their families, and staff as facilitated by the service coordinator who serves as a "conduit" among different parties.

Although many communities offered services to support independent living and aging in place, a few property managers at developments without a service coordinator perceived that their presence would provide additional benefits. One property manager explained how the presence of a service coordinator might assist residents:

> "Probably they would stay independent longer. I think we could offer much more for the residents—things of no cost. [With a service coordinator,] we could enhance the residents' life at no additional costs."

Despite these positive observations, an issue reported by some property managers with the SCP involved staffing issues or conflict between the service coordinator and residents. Six property managers commented that residents do not make use of the service coordinator when they are distrustful of or unfamiliar with the person due to staff turnover. One property manager described the importance of trust between residents and the service coordinator:

> "This particular service coordinator—since she came on board—has created rapport with residents and they trust her. The other service coordinators did nothing at all. I've heard this from residents. They not only like her, but they respect her. She worked previously in a mental ward, taking care of elderly and disabled. She has a wide background and is very knowledgeable about what's out there. She takes time to become

more informed. She's trying to put together a network of service coordinators in the area so they can have each other as a resource."

As demonstrated in this quote, it was not simply the presence of an additional staff member that added to residents' quality of life or lessened the burden on the property manager; rather, the value added involved having a knowledgeable service coordinator who was engaged as a liaison between the residents and the property staff and community at large.

Table 17 indicates that most respondents perceived that service coordination facilitated residents' ability to obtain and complete applications for benefits. In particular, property managers with the SCP generally responded positively (95 percent), and, within this group, property managers with the HUD grant were slightly more likely to agree than those using the operating budget to pay for service coordination (96 versus 92 percent).

	Table 17. Residents Complete Applications for Benefits			
	HUD-Funded Service Coordination (N=168) (%)	**Non-HUD-Funded Service Coordination (N=29) (%)**	**Service Coordination No Longer Available (N=10) (%)**	**Never Had Service Coordinator (N=156) (%)**
Strongly agree	66.1	62.1	40.0	14.7
Agree	28.6	20.7	40.0	64.7
Neither agree nor disagree	3.6	10.3	10.0	5.8
Disagree	1.2	3.4	0	12.2
Strongly disagree	0	0	10	1.9

Property managers applauded the efforts of service coordinators in navigating residents through the multitude of complicated benefit programs. Several property managers with service coordination gave additional information to demonstrate the many ways that service coordinators supported residents, including obtaining entitlements, transportation, and mental health services. One property manager said the following:

> "They assist residents in finding services they need; [otherwise] residents would not know who to contact or where to go. They help with paperwork, Medicare/Medicaid, transportation to and from doctor's appointments, counseling here and there for grieving. They help them to stay very independent. They have had a huge impact."

Likewise, a property manager at a development without service coordination stated, "I think obtaining services would be easier because of service coordinator's knowledge—office staff does not have this expertise." They perceived that the presence of a service coordinator would facilitate residents' access to benefit programs.

In particular, the introduction of Medicare Part D in 2006 created a lot of confusion for residents and staff; however, service coordinators often helped them navigate the changes. Several project managers indicated that, without a service coordinator, they would have been "totally lost" in trying to help residents navigate changes introduced by Medicare. Another property manager commented as follows:

> "I think the service coordinator is excellent. Without her we would not be able to get our work done. I wouldn't have enough time in the day to help them—different forms for Medicare/Medicaid. She does one-on-one assistance. I wouldn't be able to get any of that done. Whoever thought of that, it was an excellent idea."

Table 18 shows that property managers at developments with service coordination generally responded more positively that the presence of a service coordinator reduced the number of emergency or 911 calls (approximately 41 percent). Within the group that had the SCP, those that used their operating budget were slightly more likely to agree that service coordination reduced the number of emergency or 911 calls than those with the HUD grant (44 versus 40 percent). Across all groups, more property managers at developments with non-HUD-funded service coordination neither agreed nor disagreed that it reduced emergency or 911 calls (45 percent). Among property managers who never had service coordination, almost one-half generally disagreed that service coordination would reduce the number of emergency or 911 calls (49 percent).

Table 18. Number of Emergency/911 Calls Is Reduced				
	HUD-Funded Service Coordination (N=168) (%)	Non-HUD-Funded Service Coordination (N=29) (%)	Service Coordination No Longer Available (N=10) (%)	Never Had Service Coordination (N=156) (%)
Strongly agree	11.9	20.7	10.0	6.4
Agree	29.2	20.7	30.0	16.7
Neither agree nor disagree	38.7	44.8	0	26.9
Disagree	16.1	6.9	50	40.4
Strongly disagree	3.6	3.4	10	9.0

A property manager added that, with the service coordinator on staff, safety at their development had improved:

> "Our development has become a safer place with a service coordinator. When I started, we would have stoves catch on fire, etc. There is great value [to the safety of the property] with service coordination."

Table 19 shows that most respondents agreed that service coordination promoted residents' access to affordable transportation. In particular, most (93 percent) property

managers that had non-HUD-funded service coordination generally agreed that it supported residents' access to affordable transportation.

	HUD-Funded Service Coordination (N=168) (%)	Non-HUD-Funded Service Coordination (N=29) (%)	Service Coordination No Longer Available (N=10) (%)	Never Had Service Coordination (N=156) (%)
Table 19. Residents Have Access to Affordable Transportation				
Strongly agree	39.3	51.7	20.0	28.2
Agree	48.8	41.4	50.0	49.4
Neither agree nor disagree	4.8	0	0	8.3
Disagree	3.6	3.4	30.0	11.5
Strongly disagree	3.0	0	0	1.9

Across the quality of life questions, property managers at developments that had service coordination at the time of survey administration rarely disagreed with the quality of life questions. In contrast, property managers at developments that never had service coordination were less likely to perceive that it would affect residents' ability to obtain needed services. Interestingly, the responses of property managers at developments where service coordination was no longer available tended to be more similar to the responses of property managers with service coordination than those without. The one exception was the effect of service coordination on the reduction of emergency or 911 calls; both property managers at developments that no longer had and those that never had service coordination (60 versus 49 percent) tended to disagree with this question.

The presence of the service coordinator was also generally perceived as "removing the burden" of the property manager's time to attend to their main tasks. One respondent commented, "Our complexes that have service coordinators are able to run more smoothly—leaving our managers the time to handle the day-to-day tasks."

Discontinued Service Coordinators

There were a small number (n=10) of properties whose developments offered service coordination at one time, but, at the time of survey administration, were without a service coordinator. The reasons why the program was discontinued varied. In open-ended responses, four property managers cited personnel changes and two indicated underutilization of service coordinators as what prompted program termination. One property manager explained, "The residents were very independent and they did not use it that much. We had a very active [resident] association; we didn't need a service coordinator."

A few respondents commented that many times the work of the service coordinator duplicated services that were available either within the community or at the property. Only two respondents identified financial reasons for the termination of service coordination at their property. One indicated that they could not afford to fund the service through their residual receipts and the other said that when the HUD grant ran out, they simply never replaced the service coordinator.

Other Resources for Service Coordination

Although property managers at developments with the Service Coordinator Program tended to describe positive benefits for residents, property managers at developments without service coordination indicated that residents' needs were adequately met through other resources. Several property managers listed outside agencies and individuals that provided service coordination and related services to residents, including the following:

- Salvation Army.
- City transportation services (including Access Bus).
- Family members.
- Social workers.
- City or county services for the elderly/office of aging.
- City- or county-subsidized benefits (including meals, health care, heating, literature, and house care events services).

Property managers, particularly of small developments or those in rural settings, indicated that, between the resources available locally and what they could provide on site, residents' supportive service needs were adequately met. One property manager said, "Between their families, us, the Senior Center, and the community—we provide all kinds of services that residents need. I think we are pretty well set up."

Despite these observations, several property managers without service coordination conceded that, if available, a service coordinator would more effectively support their residents. One property manager shared this story:

> "I had a lady who needed a walker. She was using an old one that someone gave away. I found her another one a couple of days later. That happened only because I tried to find something for her. But if there was someone here, residents could get those things more quickly."

Likewise, property managers indicated that as residents face issues of declining health, they would likely benefit from supportive services facilitated by service coordination and furthermore, "their health might not decline as much with a service coordinator on site."

Recommendations for the Service Coordinator Program

The survey included a final open-ended question soliciting suggestions on making services available to residents. Property managers at developments with the Service Coordinator Program thought the program provided positive results to residents, produced an overall cost savings, and "saved managers from stress and from difficult situations." Property managers credited service coordinators with "being able to hold things together" at their developments. One property manager described a particularly volatile time during which the service coordinator was essential to ensuring residents' well-being:

> "In post-Katrina New Orleans, it has been very vital. As residents have come back, we have seen them more than ever in need of supportive services. Service coordinators have been very significant in support of them."

Although property managers at developments with service coordinators provided more positive responses to this open-ended question, property managers at developments without service coordination responded positively about the program as well. For example, in developments without service coordination, property managers perceived the role of service coordinators as eliminating the "double duty" that occurs within the context of providing for residents with special needs "where it's easy to get caught up in multiple tasks and the daily grind can get the better of you." Some were quite familiar with the program, as described in the following observation:

> "We have service coordinators on other properties and they are an asset— it does make a difference. We are working to get a service coordinator and hope to have one soon. We want to do it and value it."

Those with the SCP described the program as essential to the daily functions of their developments. Many thought that the service coordinators helped to free up the property staff from duties that are outside their expertise. A property manager explained as follows:

> "Service coordination should be mandatory for elderly facilities because it allows residents to age in place very well. It's like a physical—it's proactive rather than reactive."

Many respondents thought that the SCP should continue and most thought that more funding was needed to expand the scope of the program beyond serving developments for the low-income elderly and nonelderly people with disabilities to also include developments for families with children.[23] One property manager gave the following justification:

> "More funding should be made available to family complexes. Not just the elderly need assistance in maintaining their housing and finding services

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to assist them. Parenting, GED, drug counseling and housekeeping are only a few areas in which our families need the services of a service coordinator."

When asked for suggestions to improve the provision of service coordination, property managers without service coordinators were more likely to indicate that they needed more information about the program. In the final open-ended question, 13 property managers without service coordination responded by requesting information about the program. Other respondents commented that their facilities were either too small to need service coordination or that the range of resources available to be tapped in their local community were too limited to benefit from service coordination. One property manager described her development in a rural setting as follows: "I'm sure in a larger facility it would be a necessity. With me having a small facility on an island, we have certain people we contact for help."

In addition, some perceived that there were sufficient resources in their local community and that the addition of service coordination would lead to a duplication of services.

Conclusions

Based on our random sample, survey findings suggest that just more than one-half of HUD's privately owned, assisted multifamily housing developments for low-income elderly and nonelderly people with disabilities offer service coordination to residents. More than one-half (53 percent) of those that pay for service coordination with the Service Coordinator Program use their operating budget, which corresponds with HUD's preference that property owners include the service coordinator's salary in the operating budget. Rather than depending on supplementary grants, funding service coordination through the operating budget has the added benefit of providing a constant funding source and saving management time they would otherwise spend on administering a grant program. In addition, answers to the four questions that this survey set out to address are discussed in the following text.

First, we found that developments with service coordinators differed from developments without service coordinators in several ways. Basing our calculations on the reported number of hours worked by HUD-funded service coordinators, we determined the ratio of hours to the number of residents and found that they each resident received about 30 minutes of service coordination per week. This finding is consistent with HUD's guidelines that suggest a full-time service coordinator serves about 50 to 60 frail, at-risk low-income elderly or nonelderly people with disabilities. Also, analysis of the quality of life questions for residents indicated that developments with service coordination trended higher than those without service coordination.

Second, for developments without service coordinators, we found several reasons why they do not provide service coordination to residents. Property managers at developments with a small resident population or those located in rural areas indicated that service coordination was not a good use of resources; either there were too few residents to merit an additional staff member (often the property manager handled their service coordination needs) or there were insufficient supportive services available in their local community to link residents Although many communities offer a service-rich environment to support independent living or aging in place, a few property managers at developments without service coordination perceived that the presence of a service coordinator would benefit their residents. In contrast, other property managers described a philosophical difference wherein they perceived their development as emphasizing "independent living" and either viewed their residents as not needing service coordination or as being responsible for taking care of their own supportive services needs. Also, several property managers at developments that did not offer service coordination to residents were not aware of the program and indicated they needed more information.

Third, for developments with service coordinators, property managers described the range of perceived benefits to residents and to property managers themselves. Overall, property managers at developments that offer service coordination had a more positive opinion of service coordination. When asked to what extent service coordination had affected or would affect residents' quality of life or their ability to obtain services,

property managers at developments with service coordination responded more positively than those without service coordination. Property managers at developments with service coordination described the importance of an onsite advocate as someone who provided residents with a sense of security and well-being, facilitated social cohesion among residents and staff, kept residents engaged, and reinforced independent living. In addition, property managers indicated that the presence of a service coordinator who attended to residents' supportive services needs enabled them to focus on the operation of the property. Furthermore, having a service coordinator who was well connected with community resources and understood benefits programs provided a sense that residents' needs were being met. Property managers recognized that it was not simply the presence of an additional staff member that improved residents' quality of life or lessened the burden of the property managers; rather, the value added involved having a knowledgeable and engaged service coordinator who is a conduit between the residents and their families, the property staff, and the community at large.

In addition, there were differences between having the SCP versus having a non-HUD-funded service coordinator. First, there was a statistically significant difference in the responses to whether the property manager had received training on the roles and responsibilities of service coordinators. Two-thirds of property managers at developments with the SCP had received training in contrast with only 16 percent of property managers at developments with non-HUD-funded service coordination. The presence of training is notable. The influence of a property manager who understood the roles and responsibilities of service coordinators might contribute to a more service-rich environment that facilitated residents' independent living or aging in place. Second, the median number of hours per week an onsite service coordinator was available was 32 for developments with the SCP and 20 for developments with non-HUD-funded service coordination. Third, among properties with non-HUD-funded service coordination, most had never applied for the HUD grant (97 percent). This observation may indicate that properties with non-HUD-funded service coordination were less likely to consider HUD as a potential sponsor for expanding the scope of their program to support residents. Because properties with non-HUD-funded service coordination served a higher percentage of exclusively nonelderly people with disabilities, perhaps this population variation could be attributed to the availability of funding from state or local Medicaid or other government source for residents of those developments. Finally, analysis of the quality of life questions for residents indicated that property managers at developments with the SCP tended to respond more positively than those with non-HUD-funded service coordination. Perhaps this trend may be attributed to the frequent training and reporting required under the SCP.

Further research is needed to document the costs and benefits of the SCP. When the following four factors are considered, the positive effect of service coordination is significant: (1) service coordination allows residents to live independently in their own homes 10 percent longer, (2) service coordination translates into a cost savings to taxpayers by forestalling the need for institutionalization, (3) the median number of hours per week a HUD-funded service coordinator was available on site was 32, and (4) property managers at developments with service coordination were very positive about

the effect on residents' quality of life. By forestalling or preventing unnecessary institutionalization, service coordination programs help to improve residents' quality of life and save taxpayer dollars. Considering the importance of quality of life, where residents continue to live independently in their own homes (rather than placement in skilled nursing facilities), and the significant cost savings to taxpayers by preventing premature institutionalization, the SCP may offer greater implications than are demonstrated by this report.

Appendix A

1. Demographic Information

Introduction: HUD is currently conducting a national study in order to improve our housing and service programs that serve low-income elderly and persons with disabilities.

This study involves a telephone survey administered to a nationally representative, random sample of HUD-assisted properties. The survey will assess Property Manager's current level of satisfaction with the provision of service coordination, which links residents of HUD-assisted housing to needed supportive services.

As someone with direct experience working with HUD-assisted housing, your participation in our national survey will be a very important contribution for our research on service coordination at HUD-assisted housing. Learning about your experiences will help HUD to improve programs that serve your residents. Through learning about what is happening in HUD-assisted housing properties and in communities, we can make our programs work better.

It takes about ten minutes to complete the survey. In order to protect your privacy, the information you provide will be summarized in our research reports and will not identify you personally.

Would you be willing to participate? Is now a good time?

If you want to contact someone at HUD with any questions, you can reach Carissa Janis in the Office of Multifamily Housing at (202) 402-2487.

OMB CONTROL NUMBER: 2528-0246; EXPIRATION DATE: 03/31/2010

1. Participant Contact Information

First and Last Name	
Title (Job Description)	
Phone Number	
Email	

2. Property Address

HUD Property ID/HUD Contract Number	
Street Address	
City	
State	
Zip Code	

2. Survey Questions

3. For this survey, we will only focus on those properties selected for the survey. What type of property do you manage?

☐ Section 202/PRAC

☐ Section 202/without rental assistance

☐ Section 202/8

☐ Section 8

☐ Section 236

☐ Secton 221(d)(3) BMIR

☐ Other (please describe)

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[                              ]
[                              ]
[                              ]
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4. What type of population do you serve?

☐ Elderly

☐ Non-Elderly Disabled

5. Do you manage more than one property?

◯ Yes   ◯ No

3. Skip page

6. How many properties do you manage?

[   ]

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Survey of Multifamily Property Managers on Service Coordination

4. Skip to residents

7. How many residents currently live at your property?

◯ A. 2-20
◯ B. 21-40
◯ C. 41-60
◯ D. 61-80
◯ E. 81-100
◯ F. 101-200
◯ G. 201 or more

8. Over the past year, what would you estimate is the occupancy rate for your property (percent occupied)?

◯ 0-10%   ◯ 41-50%   ◯ 81-90%
◯ 11-20%   ◯ 51-60%   ◯ 91-100%
◯ 21-30%   ◯ 61-70%
◯ 31-40%   ◯ 71-80%

9. Have you ever applied for the HUD Service Coordinator Grant Program? (By definition, a "Service Coordinator" is a social services staff person who is responsible for assisting the elderly and persons with disabilities to obtain needed supportive services. Supportive services are those that promote and enable independent living and aging in place.)

◯ Don't know
◯ Yes
◯ No. Please briefly tell me why not?

[text box]

10. Which of the following best describes the availability of service coordination at your property now?

◯ HUD funded on-site service coordination (funded through operating budget, excess income, residual receipts, or HUD-grant)
◯ Non-Hud Funded (provided by a public/private agency etc. or residents pay for SC)
◯ Residents received formal service coordination in the past, but this is no longer available

◯ Residents have never received formal service coordination

5. Skip for no service coordination

11. Which of the following best describes/described employment of the service coordinator for your property?

◯ Service coordinator is employed by the property owner or management agent

◯ Service coordinator is employed by another organization

6. Skip to Number of Service Coordinators

12. Approximately, what date did a service coordinator first become available at this property?

Date   MM   DD   YYYY

[ ] / [ ] / [ ]

13. How many hours per week do you have service coordinators available for the residents?

Total Number of Service Coordinator Hours per week   [ ]

14. Now I will ask you about funding for service coordination. How is/was this positon funded?

[ ] HUD Service Coordinator Grant Program

[ ] Operating Budget

[ ] Residual Receipts or Excess Income

[ ] Don't know

[ ] Other (please describe)

[text area]

15. The Service Coordinator Program allows owners to assist elderly individuals and persons with disabilities living in HUD assisted projects and in the surrounding area to obtain needed supportive services from the community. At

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your property, who does/did receive services coordination?

☐ Available to all residents

☐ Only available to some residents

☐ Available to elderly and non-elderly members of the community who are not residents of your property

☐ Other (please briefly describe)

[text box]

7. Skip for HUD Service Coordinator Program

16. Briefly, please tell me why service coordination ended at your property?

[text box]

17. Approximately, when did service coordination end at your property?

```
              MM    DD    YYYY
Approximate date  [  ] / [  ] / [    ]
```

18. Do you know whether or not the owner plans to request funding for a service coordinator in the future?

◯ Don't know   ◯ Yes   ◯ No

8. Skip if no service coordination

19. Now I am going to ask you about the impact of service coordination. For your residents, please tell me which of the following items are/would be impacted by service coordination?

☐ Increase in the variety of services available

☐ Increase in quality of services available

☐ Residents stay independent longer

☐ No discernable impact

☐ Don't know

☐ Other (please specify)

>

20. Have you received training on the roles and responsibilities of service coordinators?

◯ No

◯ Yes. Where and from whom did you receive this training?

>

21. Now I am going to ask you about the current conditions of your residents. For each of the following items, please tell me to what extent you agree that your residents are able to obtain needed services?

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
Residents are able to age in place: Residents are able to stay in their home rather than move to housing with a higher level of care.	◯	◯	◯	◯	◯
Residents are able to maintain a self-reliant lifestyle such as having access to assistance with housekeeping, shopping, or personal care tasks.	◯	◯	◯	◯	◯
Residents have access to social/recreational interaction such as participating in planned activities and resident groups.	◯	◯	◯	◯	◯
Resident are able to obtain and complete applications for benefits or entitlement programs such as for Medicare/Medicaid, Social	◯	◯	◯	◯	◯

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Security, Food Stamps, Pension, etc.

The number of emergency/911 calls made from your property could be reduced if appropriate services were available to the residents/has been reduced since you have SC.	○	○	○	○	○
Residents have access to affordable transportation options.	○	○	○	○	○
Overall, to what extent do you agree that having a service coordinator has enabled/would enable your residents to obtain needed services?	○	○	○	○	○
Overall, to what extent do you agree that a service coordinator has improved/would improve the residents' quality of life?	○	○	○	○	○

22. Thinking about the aspects of service coordination I mentioned so far, is there anything else that you would like to add about the impact of service coordination on residents' quality of life?

23. Is there anything else you would like to suggest to HUD about service coordination or making services available for the residents?

9. Closing

Thank you for taking the time to complete the survey.

Appendix B

Comparison of Service Coordinator Program-Eligible Property and Sampled Property Residents							
Eligible Property Residents (N=542,420)							
	Age Range						
Type of Property	People With Disabilities (%)	62–69 (%)	70–74 (%)	75–79 (%)	80–84 (%)	85–90 (%)	Older Than 90 (%)
Section 202/PRAC	1.4	8.2	8.2	8.3	6.5	3.6	1.5
Section 202/8	13.6	8.9	7.6	8.4	7.8	5.2	2.5
Section 8	28.0	17.3	13.5	14.7	13.4	8.8	4.3
Insured subsidized	8.8	5.1	3.8	4.0	3.7	2.4	1.1
Total percentage	23.5	17.9	15.0	16.1	14.2	9.0	4.3
Sampled Property Residents (N=21,030)							
	Age Range						
Type of Property	People With Disabilities (%)	62–69 (%)	70–74 (%)	75–79 (%)	80–84 (%)	85–90 (%)	Older Than 90 (%)
Section 202/PRAC	0.8	23.3	22.9	21.6	17.1	10.1	4.3
Section 202/8	15.7	18.2	16.7	17.6	16.3	10.5	5.0
Section 8	16.5	18.4	15.9	16.9	16.2	10.5	5.6
Insured subsidized	22.8	18.2	15.1	15.9	14.1	9.3	4.6
Total percentage	15.7	19.0	16.9	17.5	15.8	10.1	5.0

PRAC = project rental assistance contract.
Note: Tenant Rental Assistance Certification System resident data as of October 2007

Appendix C

Comparison of Survey Respondents and Nonrespondents				
	Nonrespondents		Survey Respondents	
Type of Property	Number of Properties	Percentage	Number of Properties	Percentage
Section 202 without rental assistance	1	.3	5	1.4
Section 202/8	98	33.8	98	27.0
Section 202/PRAC	49	16.9	65	17.9
Insured subsidized	38	13.1	78	21.5
Section 8	100	34.5	114	31.4
Other	4	1.4	1	.3
Total	290	100.0	363	100.0

PRAC = project rental assistance contract.

Appendix D

Regression Output of Average Length of Occupancy (Controlling for Missing Data)

	Unstandardized Coefficients		t.	Significance
	B	Standard Error		
(Constant)	7.764	0.862	9.007	0.000**
Service Coordinator Program (SCP)	0.558	0.296	1.885	0.060*
Age of resident at entry	– 0.085	0.013	– 6.326	0.000**
Number of residents in property	0.005	0.003	1.534	0.126
Average income (in thousands)	0.016	0.070	2.291	0.023**
Fair Market Rent (in hundreds)	0.003	0.001	3.719	0.000**

N=315.
Notes: Resident data and Fair Market Rent data retrieved from HUD's Tenant Rental Assistance Certification System, which contains data for all multifamily housing with a rental subsidy contract. SCP information obtained from the SCP survey. Thirty-five properties did not have Fair Market Rents; therefore, an average of all the Fair Market Rents was used as a dummy for this variable.
Adjusted R-square: .170.
*p < .10.
**p<.05.

Regression Output of Average Length of Occupancy

	Unstandardized Coefficients		t.	Significance
	B	Standard Error		
(Constant)	7.611	0.873	8.717	0.000**
Service Coordinator Program (SCP)	0.581	0.293	1.984	0.048**
Age of resident at entry	– 0.081	0.014	– 5.734	0.000**
Number of residents in property	0.003	0.003	0.972	0.332
Average income (in thousands)	0.150	0.076	1.981	0.049**
Fair Market Rent (in hundreds)	0.003	0.001	3.980	0.000**

N=294.
Notes: Resident data and Fair Market Rent data retrieved from HUD's Tenant Rental Assistance Certification System, which contains data for all multifamily housing with a rental subsidy contract. SCP information obtained from the SCP survey. Thirty-five properties did not have Fair Market Rents; therefore, an average of all the Fair Market Rents was used as a dummy for this variable.
Adjusted R-Square: .168.
*p < .10.
**p<.05.

Notes

[1] Section 808 of the Cranston-Gonzalez National Affordable Housing Act (42 USC 8012) amended Section 202 of the Housing Act of 1959 (12 USC 1701q (g)).

[2] All U.S. Department of Housing and Urban Development (HUD)-funded service coordinators must submit the Semi-Annual Performance Report, form HUD-92456, to the local HUD field office. This report includes data on the number, age, and impairment level of residents; the types of services received as a result of the service coordinator's work; the types of education and wellness programs offered; training sessions that the service coordinator attended; and accounts of the successes or difficulties in getting access to services for the residents.

[3] In the first year of funding, only Section 202 developments were eligible for HUD grants under the Service Coordinator Program (SCP). Since the enactment of the Housing and Community Development Act of 1992, all multifamily assisted developments designed or designated for the low-income elderly or people with disabilities (except Section 811) can now use HUD funds to pay for service coordination. Of the 3,742 developments that currently have a service coordinator, 1,858 (50 percent) are Section 202 developments and 1,884 (50 percent) are another project type. The multifamily project types eligible for service coordinator funding covered in this report include Section 202 with a project rental assistance contract (PRAC), Section 202 without rental assistance, Section 202 with Section 8, Section 8, Section 236, and Section 221(d)(3) Below Market Interest Rate. These project types are named for the section of the acts that created funding for the construction or operation of such projects. In addition, all projects eligible for HUD service coordinator funding must be designed or designated only for the low-income elderly and/or people with disabilities. Although Section 811 projects are specifically built for people with disabilities, they are not eligible for service coordinator funding because there is no statutory authority that allows for this provision.

[4] Participation in the SCP is not restricted to HUD funding. All funding sources may be used to pay for the service coordinator's salary; fringe benefits; training; travel; quality assurance; creation of private office space; and office supplies, furniture, and equipment. Because funding for service coordination could be from one source or a combination of different sources, we did not have sufficient information to make these distinctions here.

[5] For example, HUD requires that service coordinators either have or receive within 12 months of hiring a minimum of 36 hours of training in nine areas, seven of which are statutorily mandated. After meeting the statutory requirement, all service coordinators are required to have at least 12 hours of continuing education annually.

[6] The survey instrument contained mainly closed-ended questions with some open-ended followup questions. The majority of the survey was administered via the telephone; however, a few surveys were self-administered by property managers who were too busy to participate in the telephone survey. For those surveys collected over the telephone, survey administrators used the open-ended questions to probe respondents for more detailed information about the properties and for clarification on responses on closed-ended questions and to obtain general assessments of residents' well-being.

[7] The majority of the respondents were property managers (47 percent); 36 percent were directors, administrators, or managers; 10 percent were executive directors, presidents, owners, or chairpersons; the other 7 percent ranged from administrative assistants to accountants for the property.

[8] The operating budget consists of Section 8 or PRAC rental subsidy funds that are combined with tenant rental payments to cover daily operating expenses that constitute a development's operating expenses.

[9] This table includes data from HUD's Real Estate Management System for all multifamily projects that have a project-based rental subsidy and that are designated for low-income elderly individuals and/or people with disabilities. These data are valid as of February 1, 2008.

[10] Op cit note 4.

[11] All respondents interviewed for this survey were selected from developments that were eligible for HUD's SCP; however, some were not eligible for the HUD grant.

[12] This table excludes those properties that previously had service coordination (n=10) as well as one property missing occupancy rate information.

[13] This table excludes properties that previously had service coordination (n=10).

[14] Resident data were retrieved from HUD's Tenant Rental Assistance Certification System, (TRACS), which contains data for all multifamily housing with a rental subsidy contract. Residential demographics reflect 353 properties; however, individual resident information was not available for 10 properties included in the sample because they do not currently receive rental subsidy payment from HUD. For these 10 excluded properties, 70 percent reported the number of residents in the property as more than 100.

[15] This table excludes those properties that previously had service coordination (n=10) as well as missing resident information.

[16] When age, race/ethnicity, and gender are accounted for, the demographic profile demonstrated here is similar to that of aging Americans overall. See http://www.agingstats.gov.

[17] This table excludes properties that previously had service coordination (n=10).

[18] This analysis involved the use of the secondary data source, TRACS, which contains data for all multifamily housing with a rental subsidy contract. Data for tracking length of residence in properties with non-HUD-funded service coordination, however, were not available.

[19] In 2006, the average annual cost of care in a nursing home was $70,000. See http://www.kaiserfamilyfoundation.org/medicaid/upload/7452.pdf.

[20] As stated previously, property managers were the intended survey respondents but occasionally could not be reached. After several attempts to reach a property manager, either another knowledgeable staff member (such as a property management agent or executive director) was surveyed or the sampled property was recorded as a nonresponse. Thus, it is not surprising that some respondents did not know how the details of service coordination were funded at the sampled property.

[21] Across developments with HUD-funded service coordination, those using the operating budget to pay for service coordination trended slightly higher than those using the HUD grant in serving exclusively low-income elderly residents (58 versus 50 percent). As previously noted, however, the prevalence of Section 202/PRACs skews the numbers because these developments are exclusively for people older than 62 and can use only the operating budget to pay for service coordination, and thus are ineligible for the HUD grant.

[22] This is particularly interesting because grant funds can be used to pay for training only for service coordinators but not for property management staff.

[23] HUD's Resident Opportunities and Self Sufficiency (ROSS) Service Coordinator Program also funds service coordination, yet it is generally available to all resident of conventional public housing or Indian housing. It provides funding to hire and maintain service coordinators who will assess residents' needs to

coordinate available resources in the community to meet those needs. Offered to a broader population, services provided under ROSS enable participating families to increase earned income, reduce or eliminate the need for welfare assistance, make progress toward achieving economic independence and housing self-sufficiency or, in the case of low-income elderly or people with disabilities, help improve living conditions and enable residents to age in place. See http://www.hud.gov/offices/pih/programs/ph/ross/about.cfm.