Coordinating Property Management and Social Services in Supportive Housing

curriculum

supportive housing training series

Trainer's Preface

I. <u>Brief Summary of Curriculum Content</u>

This curriculum contains <u>at least</u> six hours of verbal content. This does not mean that all of the content must be covered in its entirety. Depending on the intended focus of the training and the format (exercises and small group discussions vs. large group presentation), portions of this training can be elaborated, abridged and/or deleted.

II. <u>Good Training Practice</u>

A. <u>How People Learn</u>
People learn through a combination of lecture, visual aids and participation. The more actively they are involved in the process, the more information they will retain. For this reason, eliciting answers from the group rather than presenting material is usually preferable. Additionally, it is important to include exercises that stimulate interaction and experiential learning and not spend all of the time lecturing. Be aware, however, that group participation and discussion takes more time than straightforward presentations and may cut down on the amount of content possible to cover. What is minimized or deleted from the curriculum should be based on the assessment of the group's learning needs and the goals initially contracted with the group.

B. <u>Know Your Audience</u>
The type of setting that the trainees work in and their roles will determine the areas of the curriculum that the trainer will focus on. Gathering as much information about the group beforehand is recommended.

C. <u>Introductions and Training Contract</u>
Introductions should provide the trainer with more information as to who the audience is. The trainer will want to know the person's name, program and role, and what s/he hopes to get out of the training. The trainer should then clarify what will and will not be covered. This is the training contract.

D. <u>Acknowledge and Use Expertise of the Participants</u>
This is important as it allows people to learn from each other, builds group cohesion, keeps people involved and establishes an atmosphere of mutual respect.

E. Flexibility

Throughout the training, the trainer should continually assess the needs of the group and revise the amount of time devoted to each specific topic. Responding to the needs and interests of the group must be balanced with the agreement to cover certain topics. It is the trainer's job to respond to the needs that arise and yet stay focused on the topic. The initial needs assessment should help determine what the training group is interested in and can help shape what to cover in greater depth.

III. Training Content

A. Sequence of Content

Optimally, the training should be presented in the order that it is written, with the material related to the development phase of a project proceeding the material on the operational phases.

B. Flexibility of Content

This curriculum can be adapted to meet the needs of the audience. Sections II. and III. are more relevant to the development phase of a project and should probably be omitted if the trainees' projects are all underway.

C. Personalizing Content

In order to personalize the training, it is important for the trainer to offer case examples or anecdotes regarding the topic. This can also be achieved by eliciting personal stories from trainees. Using these relevant stories will make the training more interesting and personal.

D. Matching Content to a Target Audience

It is important for the trainer to ensure that the trainees match the target audience for this training. Trainings will have a mixed group of participants (in experience) and the trainer should emphasize that some content of the training will be more relevant to some than others, but overall everyone will gain something. If there is adequate representation from both management and services, it is advisable to break up the small groups according to their functions. If not, the trainer can assign one group Services and one group Management, and ask them to imagine what it would be like to be in the other person's shoes. This is often a helpful exercise to do when there is a stalemate between management and services as it can create empathy and a newfound understanding.

IV. Time Management of Content

Each section of the agenda has time frames allotted. The trainer should be aware that if a great deal of time is devoted to one topic area, other content areas might be sacrificed. Group exercises can always be abridged if necessary for time's sake. For example, if the group exercise involves dividing into four groups to work on four separate cases, the trainer should consider having each group work on a smaller number of cases. This will shorten the report back time, but will not eliminate the group process. Remember, elicitation and discussion takes more time than lecturing but less time than small group exercises. The trainer needs to balance this with the fact that lecturing is also the least effective way to learn.

The trainer will find that each time this curriculum is trained, it will vary. Being mindful of good training practice and making adjustments to the timing and sequence will allow for a tailored training that will be most beneficial to participants.

I.   Introduction

Purpose and Goals of the Training

This training will examine the elements of an effective working relationship between property management and supportive services, whether or not they are provided by one or two separate organizations.

The goal of this training is for providers to better understand some of the common pitfalls in the relationship between management and services and to learn strategies to facilitate better collaboration and coordination.

At the end of this training, participants will be better able to:

- Understand the rationale for separating management and service functions;
- Give consideration to whether or not to form a partnership with another provider organization;
- Identify the goals of management and services;
- Identify the roles of management and services;
- Recognize areas of shared responsibility and natural tensions;
- Learn strategies to avoid common pitfalls;
- Develop strategies that will facilitate effective communication and coordination.

Trainer reviews **HANDOUT: 1. *AGENDA***

AGENDA

I.   INTRODUCTION
  A. Rationale for the Training
  B. Go Round

II.   TWO MODELS OF COLLABORATION

III.   THE DEVELOPMENT PHASE: CREATING A PARTNERSHIP
  A. Considerations in Choosing a Partner
  B. The Process of Creating a Partnership

IV.   DIFFERENTIATING PROPERTY MANAGEMENT AND SOCIAL SERVICES
  A. Goals Management and Services
  B. Roles and Responsibilities of Each Partner
  C. Areas Requiring Shared Decision-Making

V.   IDENTIFYING COMMON PITFALLS
  A. Problems with Expectations
  B. Communication
  C. Collaboration

VI.   CASE STUDIES

HANDOUTS:

1. Agenda

2. Organizational Structures

3. Partner Selection Criteria

4. Partnership Exercise: Issues to Consider in Selecting a Partner Organization

5. The Process for Creating A Partnership

6. Supportive Housing Project Design: Program Goal Considerations

7. Property Management and Supportive Services Roles and Responsibilities: Areas of Overlap

8. Principles of Confidentiality

9. Maintaining Communication Between Property Management and Social Services

10. Case Studies: Property Management/Social Services Coordination

11. Annotated Bibliography

I.   INTRODUCTION

A.   RATIONALE FOR THE TRAINING

BRIEF LECTURE:

The concept of supportive housing is based on the notion that individuals with special needs can live in the community if they are provided with additional supports — supports that are accessible, flexible and target residential stability.

Aside from the provision of these essential services, what distinguishes supportive housing from generic housing is that property management and social service functions must be coordinated. A collaborative relationship between property management — those who are responsible for maintaining and operating the facility — and social services — those who are responsible for providing services which target residential stability — is essential to the smooth functioning of supportive housing. Additionally, there is usually some adjustment to standard property management procedures when housing people with special needs, which will be discussed later in this training.

Anyone who has ever worked in supportive housing knows that each project must balance among competing forces — the financial demands of the building, the security of the larger tenant community and the needs of the individual tenants. Staff often find themselves caught off guard and unprepared to deal with the tensions that arise as a result of these different goals. In addition to discussing how to effectively coordinate management and service functions, today's training will explore how these natural tensions can be used to generate creativity and add a new dimension to the work.

B.   GO ROUND

TRAINER STATES:
Let's go around the room and introduce ourselves. State your name, agency, role and what you hope to get out of today's training.

LEARNING POINTS: During the introduction, it is important to discuss what will and will not be covered in the training. This will let trainees know what to expect — this is the learning contract. If someone mentions something in the go round that is not on the agenda but related, see if it can be tied in at an appropriate point in the training. Similarly, if the group is interested in exploring certain topic areas more in-depth, the trainer may expand the time spent on particular subjects.

II.   TWO MODELS OF COLLABORATION

TRAINER ELICITS:
Let's have a show of hands. How many of you are working in residences where one agency provides both the property management and social services? How many work in residences where a different agency provides each of these services?

Different projects have different approaches to the provision of property management and social services in supportive residences. The basic alternatives are:

- **SINGLE PROVIDER** — In this model, one organization provides both social services with distinctions drawn between functions.

- **PARTNERSHIP** — In this model, two or more organizations partner for the provision of property management and social services depending on expertise.

TRAINER NOTE:
Review **HANDOUT: 2. *ORGANIZATIONAL STRUCTURES.*** In eliciting these two questions, the trainer should attempt to get as many specific examples from the group as possible. For example, ask "What are some examples of ideological conflicts regarding mission, visions and goals?", or "What do you mean that decision-making is not always so clear?"

TRAINER ELICITS:
What are some of the **ADVANTAGES OF THE SINGLE PROVIDER MODEL** — having one organization provide both property management and social services?

(Expected responses include:)

- There is less interagency compromise and one organization retains overall control of the project

- There are fewer ideological conflicts regarding mission, vision and program goals.

- Decision-making, chain of command and ultimate authority is more likely to be clear.

- Time is saved if you don't have to structure a long-term collaborative effort with another agency and coordinate day-to-day operations.

- Communication is simplified; principles of confidentiality are less confusing.

- There is a "double bottom line" for services and property management. The organization will be monitoring both the physical plant and the financial viability of the project as well as the quality of the supportive services. One function will often end up taking precedence over the other.

TRAINER ELICITS:
What are some of the **ADVANTAGES OF THE PARTNERSHIP MODEL** — collaborating with another organization to provide either social services or property management?

(Expected responses include:)

- Potential conflicts that occur when one organization (and perhaps the same person) acts as both service provider and landlord. For example, a tenant will likely refrain from disclosing potentially damaging information to their case manager if s/he recognizes that this person reports to or is management.

- Many agencies do not have adequate capacity and experience in the provision of both property management and services. A great deal of time (and money) may be lost to developing this expertise through training and trial and error. Even if the organization hires people with this capacity, they may not be able to assess and/or monitor the quality of their work.

- Collaborating with another agency can bring fresh ideas, talents and new resources to the project.

- Creative solutions often arise out of the tensions and conflicts that are natural with collaborative efforts.

- From the tenant's point of view, housing is more generic and less institutional when a housing provider, not a service provider, operates housing.

- Making services separate, and not a condition of housing, allows tenants a greater sense of control and autonomy.

- Social services can advocate for tenants who are having difficulty meeting the obligations of tenancy if these two areas are separated.

LEARNING POINTS: If one agency has chosen to provide both functions, it should be clear that these two roles will need to be distinguished from each other in the form of separate departments or, in smaller projects, at the very least separate roles and job functions. The person who collects the rent and is responsible for eviction cannot also be expected to run the weekly relapse prevention group. Providers should be clear which staff is responsible for what.

III. THE DEVELOPMENT PHASE: CREATING A PARTNERSHIP

> **TRAINER NOTE:**
> This section can be omitted if the trainees have passed the development phase and are currently operating supportive housing or if the agencies are not interested in exploring partnership.

TRAINER STATES:
Now that we have reviewed some of the advantages and disadvantages of establishing a partnership between agencies or providing both services under one organization, your organization may be in a better position to assess whether or not it is willing to consider a partnership. When choosing a model for your project, an assessment of your organization's current capacity, needs and goals can help you make this decision. The next section of this training is intended to help you choose a partner if you decide to go that route.

A. CONSIDERATIONS IN CHOOSING A PARTNER

TRAINER STATES:
In determining whether your organization should consider partnering with another organization, it will need to be evaluated whether or not there is a "good fit" between the two. Just as in any relationship, it needs to be assessed whether or not the two of you are compatible.

The following broad areas should be looked at to help assess this goodness of fit or compatibility of your organization and a potential partner.

> **TRAINER NOTE:**
> Distribute and briefly review **HANDOUT: 3. *PARTNER SELECTION CRITERIA.***

The Organization's Mission and Goals
- ❑ What do you think the goals of this program should be?
- ❑ What populations are you interested in serving and why? (e.g., singles, families, people with special needs)

The Organization's Values and Philosophy
- ❑ Does your agency have an approach to services in supportive housing?
- ❑ What motivates your agency to be involved in this project?

The Organization's Experience with Similar Projects
- ❑ How much experience does your organization have with projects of this type?
- ❑ What experience do you have working with a partner?

The Organization's Expectations for Tenant Behavior

- What kinds of behavior from residents will be unacceptable to you? (e.g., alcohol use, drug use, bizarre dress, poor personal hygiene, noise disturbances)
- What will you expect from residents and what should they expect from you?
- How have you or do you plan to involve tenants in activities?
- What should the eviction criteria be?

The Organization's Management Style/Organizational Culture

- Describe your staff team (include staffing pattern, expertise, scheduled hours, supervisory hierarchy)
- What decisions do you think should be made jointly between property management and social service teams?
- How does your agency handle conflicts in working relationships?
- How do you propose to handle client information sharing between your agency and staff from other agencies, including your partner?

The Organization's Vision for Collaboration

- What kinds of issues do you think your partner agency should be responsible for? (address primary responsibility during rent-up, house rules enforcement, evictions, staff hiring, etc.)

TRAINER NOTE:
Distribute **HANDOUT: 4. *PARTNERSHIP EXERCISE: ISSUES TO CONSIDER IN SELECTING A PARTNER ORGANIZATION*.** Instruct the trainees to break into dyads and pretend they are interviewing each other to form a partnership. Have one assume the role of services and one property management. Allow 15 minutes for this exercise. When they are finished with the interview, process what happened — Did they decide to meet again? — why or why not? Did they agree on everything? If there was disagreement, did they still feel like they could work together? — why?

B. THE PROCESS OF CREATING A PARTNERSHIP

TRAINER STATES:
The following are suggested steps in the process for creating a partnership.

TRAINER NOTE:
Pass out **HANDOUT: 5. *THE PROCESS OF CREATING A PARTNERSHIP*.**

- **Research and identify potential collaborators**
- **Send a Request for Proposals** to a short, pre-screened list of qualified and interested providers which have been identified through interview and recommendations
- **Arrange a meeting to discuss selection criteria with respondents to the RFP**

- **Visit each other's sites and offices**
- **Arrange a series of meetings to further explore compatibility**
- **Write down agreed upon concrete project goals which balance the interests of the parties**
- **Work on preliminary project tasks together,** such as creating a project specific organizational chart, house rules, resident handbook, etc.
- **Solidify the agreement:** *After* you have chosen a partner and agreed to work together, you can draft a letter of intent between your organizations. This will specify the date the parties enter the agreement, your intent to work together to develop and/or maintain the supportive residence and the tenancy to be served. The roles of each party should be outlined, which party will be responsible for various costs and a project timeline should be included. It should also contain information about terminating the agreement if either party fails to perform their responsibilities. Later in the process, a more formal agreement, or Memoranda of Understanding, can be executed. This will clarify specific roles, responsibilities and relationships between the parties. Legal counsel should review this document.
- **Invest in mutual cross training**: Two subjects which invariably come up include how to share information and principles of confidentiality, and training on understanding people with special needs for building staff.

IV.   DIFFERENTIATING PROPERTY MANAGEMENT AND SOCIAL SERVICES

A.   GOALS OF MANAGEMENT AND SERVICES

EXERCISE

TRAINER NOTE:

Instructions for group exercise: Break the trainees into two groups. If there are enough representatives from each function, divide by property management and social services. If there are not enough staff from each area, assign one group property management and one group social services. Allow 15 minutes for each group to write on newsprint some of **the primary goals of social services or property management**. Bring them back together as a large group and post responses. Ask for a volunteer facilitator to circle goals that are similar or overlap using one color marker, and identify which goals are different or contrasting using another color. Refer to **HANDOUT: 6. *SUPPORTIVE HOUSING PROJECT DESIGN: PROGRAM GOAL CONSIDERATIONS*** when processing this exercise**.**

Goals of Management:
Ensure the financial viability of the project.
Ensure the viability of the physical project.
Create a safe community.
Provide affordable housing.

Goals of Services:
Help residents maintain the obligations of tenancy.
Increase residents' skills.
Increase residents' socialization activities.
Tend to each resident's individual service needs.
Create a safe community.
Maximize the independent functioning of each residence.
Build community.
Stabilize tenants' mental and physical health.
Provide advocacy.

Compatible/Mutual Goals
Ensuring the effective operations of the building.**
Providing safe, secure and affordable housing.

Conflictual Goals/Tensions
How to balance the needs of the individual tenant with the needs of the entire community?
When is it helping to support tenants' independent functioning and when is it enabling them?
Advocating for tenant's rights can threaten property management functions, for example, creating tenants' organization, which decides to withhold rent.

LEARNING POINTS: These differences in goals can lead to tensions that are actually healthy and normal in partnerships. Keeping our common goal in mind, the effective operation of the building.** It is essential to differentiate our roles and responsibilities. We can work to optimize the relationship even though our priorities may at times clash; conflicts of opinion should not be ignored. Instead, these conflicts should be acknowledged, discussed openly within the context of shared building goals and resolved.

TRAINER NOTE:

OPTIONAL EXERCISE:

Break into small groups, mixing management and service staff if possible. Instruct groups to take 10 minutes to identify what have been the biggest challenges to meeting their responsibilities and then identify their biggest sources of gratification and success. Do not process as a large group.

B. ROLES AND RESPONSIBILITIES OF EACH PARTNER

TRAINER NOTE:
Use newsprint to list the following responsibilities for management and services.

TRAINER ELICITS:
What are some of the responsibilities you associate with the social service team in a supportive residence? Think about responsibilities both before and after the project opens.

Responses should include:

- Designing and implementing the support services plan
- Raising funds for implementing the plan
- Participate in developing the house rules
- Participate in tenant screening, selection and rent-up
- Participate in orienting incoming tenants
- Meet individual needs of residents through the provision of case management services (money management, relapse-prevention services, ADL services and training, medication management, psychiatric and medical services)
- Facilitate and coordinate groups, educational forums, information sharing opportunities and activities
- Assist with rent arrears collection
- Assist in dealing with disruptive residents
- Crisis management
- Evaluate services
- Keep records of services provided and individual service plans
- Participate in community organizing
- Participate in developing and implementing emergency policies and procedures

TRAINER ELICITS:
What are some of the responsibilities you associate with property management?

Responses should include:

- Providing routine and preventative maintenance
- Trash removal
- Repairs
- Inspections
- Security
- Participate in the process of developing the project design
- Managing the rent-up process, including marketing, outreach, interviews, and tenant selection
- Overall fiscal management & accounting responsibilities

Coordinating Property Management and Social Services in Supportive Housing

- Maintain compliance with government and private funds and tax credit compliance
- Rent collection
- Coordination of service contracts (pest control, trash removal, etc.)
- Keep records on rent collection and prepare financial reports
- Filling vacancies
- Evicting residents
- Hiring resident manager
- Participate in community organizing
- Participate in developing and implementing emergency policies and procedures

C.   AREAS REQUIRING SHARED DECISION-MAKING

TRAINER ELICITS:
Now circle the areas that you think require shared decision-making and coordination.

TRAINER NOTE:

EXERCISE ON SHARED-DECISION-MAKING

Instructions for exercise — Break into small groups so that each group has one category heading below. List headings on newsprint. Instruct the group to decide what is property management's function and social service's function under each category. Come back and write responses on the newsprint and discuss findings. Refer to **HANDOUT: 7. *PROPERTY MANAGEMENT AND SUPPORTIVE SERVICES ROLES AND RESPONSIBILITIES: AREAS OF OVERLAP*.**

- ❑ **Intake**
- ❑ **Orientation of Incoming Tenants**
- ❑ **Rent Collection**
- ❑ **Dealing with Nuisance Behavior/House Rules**
- ❑ **Crisis Procedures**
- ❑ **Tenant Grievance**
- ❑ **Community Building**
- ❑ **Dealing with Health and Safety Issues**

Intake: Tenant Selection and Interviewing
- Service Interview — focus on service history and current needs.
- Management Interview — focus on ability to pay rent and meet obligations of tenancy.
- Tenant Interview — focus on characteristics of a good neighbor.
- Common Concerns: Who makes the final decision? How much information can be shared from the service interview?

Orientation of Incoming Tenants
- Services can help tenants with concrete needs around the move in such as unpacking, getting familiar with the building routine and location of laundry, neighborhood resources, staff locations and responsibilities.
- Management orients tenants about building maintenance issues, fire drills, tenant meetings.

Rent Collection
- Services can provide tenants with assistance in paying their rent (budgeting, addressing cost of substance abuse, vocational services).
- Management is usually responsible for collecting rent and addressing issues of rent arrears.
- Services and property management usually need to meet regularly to discuss plans for complementing each other's roles in dealing with rent arrears problems.

Dealing with Nuisance and Disruptive Behaviors
- House rules are generally developed jointly by Management and Services. Staff may develop some basic rules, and tenant input can be solicited to add or revise these. All staff can help promote healthy cultural norms for the building; it is frequently service staff who help to structure these efforts.
- Property management's role is generally to issue warnings and notices of violations; services try to help the tenant correct the problem. Other tenants are also important to involve in creating a safe and enjoyable living environment.

Procedures in Crises (e.g., psychiatric, medical, physical or fire)
- Clear policies and procedures should be in place for dealing with disruptions. These should clearly spell out the chain of command in case of emergency, what information to provide to EMS, when to beep staff on call, what information to record and how.

Tenant Grievance Procedures
- Staff and tenants should be aware of systems for evaluating the program and the services given. Management and Service staff generally work on this together, with service staff informing tenants about procedures through individual case management meetings or tenant meetings.

Community Building

❏ Many issues mentioned above involve aspects of community building. The tenants, as well as management and service staffs, are members of the building community and influence the culture of the community.

❏ Staff should be aware of trends in the community and plan strategies for positively influencing the culture.

Dealing with Health and Safety Issues

❏ Management may want to conduct regular room inspections together with social services staff.

❏ Services can teach ADL skills to tenants, such as practicing good hygiene habits, cooking and cleaning skills, etc.

❏ Services can assist with obtaining home health services if indicated due to inability to maintain health and safety standards.

> **LEARNING POINTS: Supportive housing requires coordination between property management and social service functions. Structures and policies and procedures will need to be revisited at different phases of the project.**

V.   IDENTIFYING COMMON PITFALLS

TRAINER STATES:
When collaborating with another agency, we are forced to form a new culture distinct from our own. Collaborations have no fixed rules and what rules there are constantly change. It is natural for conflict to arise as we create this new culture.

TRAINER ELICITS:
Using examples from your imagination or actual experiences, what do you think are some of the issues that might arise in a supportive residence that would cause management and services to clash?
Responses should include:

• Different views about program goals
• Disagreements about resident selection
• Disagreements about how to handle inappropriate behavior from residents
• Inconsistent enforcement of house rules
• Issues related to resident confidentiality
• Disagreements about resident evictions
• Disagreements about hiring residents to work for the program
• Disagreements about program participation policies
• Resident dissatisfaction with the program
• Philosophical or approach differences (example — residents should live as independently as possible, services should be offered on a voluntary basis)

A.   PROBLEMS WITH EXPECTATIONS

BRIEF LECTURE:

A common problem between management and services is each side holding different expectations about how tenants should behave. There is often disagreement over how much assistance and support to provide tenants who are having difficulty meeting the obligations of tenancy (i.e., not maintaining their rooms, engaging in disruptive and or nuisance behavior, not paying rent, etc.). It is very common for services to take a more "care-taking approach" to such tenants and to have a greater tolerance for their difficulties. Management may be less forgiving in these instances and put pressure on services to work toward eviction or alternative placement in a more supervised setting.

These conflicts are common, and there is no "right way" to handle them; they must be handled on a case-by-case basis. If, however, both sides revisit their goals and roles and are open to trial and error in a blameless atmosphere, all will benefit. Service providers in supportive housing may need to revisit the basis for the model; that is, tenants should be able to maintain the obligations of tenancy with support. Management may also need to remember that the population has special needs, and reasonable accommodations include formulating plans with social services and allowing for more time and effort.

B.   COMMUNICATION

BRIEF LECTURE: PRINCIPLES OF CONFIDENTIALITY

> **TRAINER NOTE:**
> Refer to **HANDOUT: 8. *PRINCIPLES OF CONFIDENTIALITY*.**

There is often a great deal of confusion about what information can be shared, by whom and how. *Principles of confidentiality* apply to treatment information, such as the name and type of services a person is receiving.

For social service staff, only information that is obtained in the context of professional service — that means through a counseling session, through a collateral contact and/or through a chart — is privileged. Confidentiality does not apply to information observed in a public forum, for example, a tenant who was observed drunk or a tenant who is disruptive in common area.

Because there is a great deal of misconception about what is confidential information, service staff may appear withholding or secretive when it comes to providing information to support staff. This may frustrate support staff. It is important for all programs to establish what is confidential, plus what can be shared by all levels of staff.

Also, there are ways in which services can communicate with property management, which does not divulge confidential information. Instead of saying, "The tenant is on 100 mg. of methadone and seeing a psychiatrist," it can be said, "The tenant is receiving treatment, and we can expect she will stabilize soon."

TRAINER ELICITS:
What are some ways you have or you could prevent problems with communication?

TRAINER NOTE:
Review **HANDOUT: 9. *MAINTAINING COMMUNICATION BETWEEN PROPERTY MANAGEMENT AND SOCIAL SERVICES*.**

- Maintain a log/communications book between security/front desk staff and services

- Orient each discipline early on to each other's role

- Schedule regular meetings between the director of property management and the director of social services to review key issues in the relationship, address policies and procedures and resolve conflicts between staff

- Ensure that there is a clear decision-making process (what will be decided by team leaders, by consensus, by democratic process?) and clear lines of authority within and between property management and social services

- Schedule joint staff meetings

- Appoint an incident-review committee

- Provide team-building retreats

- Provide joint training on such topics as: confidentiality, understanding special needs populations, substance abuse, etc.

C.   COLLABORATION

TRAINER STATES:
It has been pointed out throughout this training that property management and social services must bring together their different focuses and roles to any successful housing project. Coordinating an approach and sharing goals is necessary even when a single agency provides both property management and supportive services for a building.

Action through collaboration requires new work skills that many of us are not familiar with using. As one partner states in the Wilder Foundation Collaboration Handbook, "Now, I have to think of everybody all the time, not just the fastest way to get the job done. It's like marrying into a family with lots of kids; suddenly it's not just me anymore."

Collaborative work habits include:

❑ Model conflict-resolution skills and agree to not engage in splitting

❑ Create accountability standards so everyone knows what's been accomplished individually and together

❑ Reiterate the commitment to shared decision-making, compromise and conflict resolution

❑ Think about what's best for the entire community, not just one area

❑ Gain commitment to decisions, encourage buy-in by involving all those affected and soliciting their input into decisions

❑ Talk enthusiastically about the benefits of collaboration and acknowledge successes

OPTIONAL EXERCISE:

TRAINER NOTE:

Instructions for exercise: Ask participants to break into small groups. If the management and service staff from the same project are present, break groups by projects so that management and service are together. Ask participants to brainstorm recommendations to improve collaboration within their program and identify specific steps for doing so.

TRAINER STATES:

We are in the people business and the majority of us got into this field to help people succeed in their housing. This makes the stakes personal for most of us and our value system drives our decisions at work. This can make for a volatile situation when we feel our value system is being attacked or criticized. At times, it might be helpful to bring in an outside facilitator if the problem has reached the level of upper management and it cannot be resolved. A facilitator of conflict mediator should be considered in the following situations:

❑ When there is not agreement about the problem. A facilitator can help clarify the central issues based on information given by each party.

❑ When there is a risk of unfair representation of some group members. A skilled facilitator can make sure everyone's voice is heard and that no one group or group member dominates the discussion.

❑ When the conflict becomes personal and people see it as a threat to right and wrong or to their belief systems. When conflict touches the core principals of the parties involved, emotions run high, and it can be difficult to remain professional and objective.

LEARNING POINTS: When working with another agency, we should expect conflicts and build systems for dealing with it into our collaboration. The first step for resolving conflicts is to clarify the issue and recognize its source, requiring effective and open communication channels.

VI. CASE STUDIES

1. **A caseworker visits a tenant in her room. She has been difficult to engage and the caseworker is pleased to be invited in. The worker finds a room that is piled with old magazines, cans and newspapers, leaving only a narrow path to her bed. The tenant tells the worker that she is working on a project that will make her very rich and asks the worker not to tell management about all the stuff in her room.**

   Trainer's Key:
   Social Services is obligated to inform management that the room is a health hazard, while at the same time working with the tenant to clean the room by offering a cleaning service, home heath aid, etc.
   Management should monitor the room to ensure that it is brought up to standards.
   Management and Services should maintain communication.

2. **A tenant has been the source of numerous complaints from his neighbors, mostly for noise. He is behind on his rent. The service team has been trying to work with him, but he has refused all assistance. The tenant receives an eviction notice and he goes in to talk to the management team. He states that he got mugged and then missed his entitlements appointment, which is why he is behind on his rent. He tells the manager that he wants to pay his rent and remain a tenant, but he just has bad luck. He says he has tried discussing these things with services, but they are not helpful.**

   Trainer's key:
   Management and services should not fall into the trap of splitting, as there is a need to coordinate with this person and engage him in services.
   Management and Social Services could meet together with the tenant to discuss strategies to help the tenant meets his obligations.
   Management should maintain communication with services about this person's rent payment.

3. **A tenant has dementia. He has been leaving the stove on and leaving his room. The superintendent comes to social services and tells them this situation is an emergency and something must be done immediately.**

   Trainer's key:
   Social services should follow through with an assessment of the tenant's ability to live in this setting and investigate whether additional services such as Protective services and home care would provide adequate support.
   Management should maintain ongoing communication and assessment of tenant's abilities with services.

4. **A frail, older tenant is beginning to decompensate and has been screaming during the night. Social services staff have been working with his doctors to adjust his medications, and his behavior does not yet warrant hospitalization. His neighbors are complaining, and they are angry at both management and services for not doing anything about their complaints.**

   Trainer's Key:
   Social Services should inform the community that everything is being done to assist the tenant without breaching confidentiality after considering offering additional services, such as a home health aide or increased contact with staff. If there is no progress after a specified period, consideration should be given to referring to a higher level of support.

   Management can continue to assess the situation with clinical staff. If this remains an ongoing problem, eviction or placement in another, more supervised setting should be considered. Management should issue notices to the tenant regarding the noise and the consequences if it continues.

5. **A tenant accidentally cuts himself and leaves blood in the hallway. While social services are dealing with the tenant, the maintenance man cleans up the blood. Later, another tenant tells the maintenance man "that was probably AIDS blood." The maintenance man goes to social services demanding to know whether or not the tenant has AIDS.**

   Trainer's Key:
   Social Services might provide in-service training on universal precautions and HIV and related issues such as confidentiality to tenants and staff.

   Management should have trained staff on Universal Precautions and have policies and procedures in place for accidents.

6. **In the middle of the night one of the tenants comes downstairs and tells security staff that he's "had it" and won't be seen after tonight.**

   Trainer's Key:
   Social Services should insure that security is trained to recognize potentially dangerous behaviors. The individual should not be left alone. Social Services should provide ongoing supervision and follow through during the crisis.

   Management should see that Security and front desk staff are trained to contact the appropriate personnel in case of an emergency after hours and to call EMS, if necessary.

7. **One of the tenants has just died. How is this dealt with in your building?**

   Trainer's Key:
   Social Services might want to reach out to the community to help with grieving, hold a community meeting and offer support with contacting the family and arranging burial and services, if necessary.

   Management should follow policies and procedures for death of a tenant and ensure that an incident report is filed.

8. **A tenant is having problems with the heat in his apartment. He filed a work order yesterday and has not had a response. The tenant complains to social services and demands that something be done.**

   Trainer's Key:
   Social Services should inform the tenant of the expected time frame for a response from maintenance and assist the tenant in following up with property management.

   Management should respond to all requests in a timely manner and make sure that the protocol for tenant repairs is being followed.