

TRAINING PROGRAM FOR BUILDING MANAGERS SERVING THE ELDERLY: A PARTNERSHIP DELIVERS

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My presentation will be in three parts. In the first part I will trace the history of my own agency's outreach efforts and the process in which our training program developed; the second part will be a detailed description of the training course itself; and the third part will be a discussion of our experience and the results of the project.

"If anything is important, it is the future. The past is gone, and the present exists only as a fleeting moment. Everything that we think and do from this moment on can affect only the future. And it is in the future that we shall spend the rest of our lives."¹

How poignantly this author has described the fleeting as well as the everlasting nature of time. It is this paradox that must be understood, integrated, and accepted in order to allow ourselves to claim our moments in time as our own and use them to their fullest. It is critical that as gerontologists, both individually and communally, we respect, guard, encourage, cherish, create, and strive to provide opportunity for meaningful productivity, throughout life's stages. In fact, we are not without proof and extensive role models of the highest caliber productivity

at later ages to mention a few: "old people who have achieved greatness—Einstein, Schweitzer, Eleanor Roosevelt . . . those whose creative urge was not banked but fanned to greater intensity by old age."²

In our Jewish tradition, compassion rather than disdain and disregard for the old is taught to us. The Talmud teaches that: We must be careful with an old man who has forgotten his learning because of his incapacity, so as not to shame him, and to treat him with dignity. For were not the broken tablets placed side by side with the whole ones in the Ark [of the Covenant]? (Sanhedrin 96 b; Berakhot 10a)

We accept the mandate of our tradition—a tradition that venerates the old. However, we are challenged with "keeping the tradition" in the context of an ever increasing aging society that is an international demographic phenomenon. The number of older persons in the world is expected to increase from 376 million in 1980 to 1.1 billion in 2025. In the United States, from 1950–1980, the total population over 65 years of age doubled in size, increasing from 12.4 million to 24.9 million. At the present rate of growth, the total older American population will double again, to 55 million, by the year 2030.

(Presented at the International Conference on Housing and Services for the Elderly, Jerusalem, February 12, 1987)

1. Edward Cornish, "The Study of the Future." Bethesda, Md.: World Future Society, p. 7.

2. Leivy Smolar, "Context and Text: Realities and Jewish Perspectives on the Aged," *Journal of Jewish Communal Services* (Fall, 1985), Vol. 62, No. 1, p. 2.

The elderly American Jewish population represents an even "larger proportion of the Jewish population than do the elderly of other ethnic and religious groups. Nationwide, Jews over the age of 65 constitute 13.7% of the Jewish population. This number will increase to 14.5% in 1986 and to over 15% by the year 1991."³

In 1986, a demographic study⁴ revealed that of Baltimore area's 91,700 Jews, 17% or 15,589 persons were over the age of 65, and 6%, or 5,502 were over the age of 75. The latter group, those between the ages of 75 and 85, the "middle old," are those that begin to need and use the more protected environment of congregate housing and supportive social services, much of which is provided by Jewish Family Services.

The Baltimore Jewish Family Services is a large, urban family services agency. The Aged Service Department, one of the earliest created in the United States, serves approximately 1,000 elderly clients monthly, of whom more than half are 75 years old and over. The aged services now comprises 60% of the total agency's caseload. Services include assessment and counseling, such as personal, couple, adult children, support groups, and Jewish family life workshops. We have recently completed intensive staff training for a specialized Grief and Bereavement Counselling Service. Case management, financial assistance and supportive housing such as adult family care homes, and Shalom (small group) Residences are part of a continuum of services. An extensive Home Care Program provides over 62,000 hours of care per year to the community elderly, ranging from home health care, to homemaker, to housekeeping services. JFS

subsidizes at least a portion of 37,000 of these hours. Additionally, with an Elder Bridge Program, JFS is a founding agency and part of the National Elder Support Network.

This network consists of Jewish family agencies, members of the Association of Jewish Family and Children's Agencies which have "cooperatively agreed to provide assessment and support services to persons over the age of 60 whose support systems are distant or unable to provide the essential basic psychological and logistical support required for continued independent living in the community."⁵

Also, socialization is provided to those 60 years and over through a neighborhood multi-purpose senior center which combines educational and recreational programming with co-located social services.

With services reaching so many of the elderly over so long a period of time, the agency has not only been responsive to the needs of the community but to be in the forefront of planning.

The agency has been instrumental in the research and planning for all of the HUD subsidized congregate housing facilities in its area. There are 750 units with the capacity to house 1,000 persons in Northwest Baltimore city just adjacent to the local Jewish social services buildings. These housing facilities were originally designed for a reasonably healthy aged population capable of independent living. However, it has become more and more apparent that with the passage of time the "aging in place" phenomenon has occurred. Many of the tenants who had moved in as younger, well-functioning, self-directing individuals have experienced illnesses and other changes and stresses that have resulted in physical and emotional disability and social isolation. One of the overall programming goals is to assist the elderly residents of the congregate apartment buildings to deal with these changes

3. Steven Huberman, "Growing Old in Jewish America: A Study of Jewish Aged in Los Angeles," *Journal of Jewish Communal Service*, (Summer, 1984), Vol. 60, No. 4, p. 314.

4. Gary A. Tobin, "A Population Study of the Jewish Community of Greater Baltimore," sponsored by Baltimore Associated Jewish Charities & Welfare Fund, 1986.

5. "Elder Support Network, Agreement in Principle," Association of Jewish Family and Children's Agencies, New York, June 30, 1986.

and to maintain independent living in their own homes for as long as possible.

Through collaboration with public, proprietary, and other constituent voluntary agencies, the agency continues to advocate, develop, and deliver programming to the tenants. In one high-rise building we maintain a state-sponsored Sheltered Housing Program providing each participant a daily staff contact, three meals per day, and weekly personal care and housekeeping services. Hot kosher lunches are available on a voluntary basis in several buildings, with another building serving a mandatory dinner meal. Social group programming through various resources is provided in each building.

Even with all of these programs and services in place, we remain ever concerned about the continuing problems of the elderly tenants. Well over one-third of the total population of the buildings' residents are JFS clients on an individual social services basis. In order to meet these needs, we are constantly seeking innovative ways to develop and provide overall programming, and in addition, to develop programs and services to encourage and facilitate earlier referrals, thereby enabling prevention and earlier intervention to occur.

Historically, multiple outreach efforts have been designed to alleviate the isolation, loneliness, and frailty of the elderly. In 1979, a Homebound Alert Program⁶ recruited and trained volunteers of all ages to visit the elderly in their homes. In 1982, a Good Neighbor Program⁷ was implemented to develop self-help networks within two of the neighborhood high-rise buildings serving the elderly. In 1983, the JFS initiated the Jewish Caravan, an interagency⁸ collaborative effort that sent a team

consisting of a clinical social worker, a group worker, and a public health nurse, into the community to locate the isolated "hard to reach" elderly. In 1986, Elders on the Edge, an award-winning program⁹ identified characteristics of those at-risk elderly who were frequently known to many agencies but were either unwilling or unable to make use of services, and a method of service delivery followed.

In 1985, JFS initiated a comprehensive program of supportive services to two of the congregate apartment buildings in cooperation with the Jewish Community Center. The project was funded by a grant awarded to the Wallace H. Campbell (Management) Company by the National Administration on Aging through the Maryland Office on Aging. The purpose of the grant was "to demonstrate how the corporate community and private non-profit agencies can work together to meet the needs of older people."¹⁰

The Wallace H. Campbell Company manages many of the age-segregated HUD subsidized buildings in the area. The company has many years of involvement with CHAI, Comprehensive Housing for the Aged, Inc.,¹¹ at the Concord Apartments, a congregate housing facility where JFS social services are an intrinsic part of the housing afforded the elderly tenants. Through this experience, the management company has come to understand the critical need for early diagnosis, counseling, and supportive services as well as social interaction and activities in main-

6. The JFS Homebound Alert Program was an award winning grant of the Harry Greenstein Fund of the Associated Jewish Charities & Welfare Fund of Baltimore.

7. The JFS Good Neighbor Program, *Ibid.*

8. The participating agencies were: Jewish Family Services, Levindale Hebrew Geriatric Center and Hospital, the Jewish Community Center.

9. Recipient of the First Annual NACHES Award for Excellence, (National Association of Jewish Family and Children's Agencies) presented to Harry Citron and Natalie Freiburger of Baltimore JFS, Cleveland, May 1986.

10. J. Kurland and G. Lipsitz, "Rose Finally Unpacked Her Belongings: An Apartment Management Firm Takes a Social Work Approach," *Aging*, the Department of Health and Human Services, #355, 1986.

11. CHAI—a non-profit corporation operating the Concord Apartments, one of the high-rise buildings affiliated with the AJC & WF of Baltimore.

taining and/or enhancing the physical and emotional health of elderly tenants. Most importantly, the company has begun to realize that management has a responsibility to be responsive to this need.

Through a long history of participation in major outreach efforts, especially those focusing on the many elderly living in congregate senior housing facilities, JFS has become increasingly aware of the inter-relationship which exists between elderly tenants and the building managers. Day by day, hour by hour, the managers are in the position to see either gradual or dramatic physical and psychological changes that occur in their tenants. At the same time that they serve as daily "listeners," they are also being called upon in emergencies and crises.

According to Little and Laing, "Effective housing management indeed includes tenant management, or people management. "People management"—or in more humanistic terms, meeting human needs—ensures the marketability of property by addressing tenant needs prior to their becoming problems and to deal with problems before they escalate into crises."¹²

The challenge to JFS was to define how best to work with the building managers to help them learn to be better prepared to meet human needs while also meeting management needs. The task was to engage their help to work together with the agency staff to better serve the needs of their mutual "clients," the elderly residents of the congregate housing buildings.

The agency, using community organization skills, was to invite a group of the managers themselves with whom staff had been working on an individual case by case basis to participate in an intensive series of interviews, dialogues, and group

discussions. Their input was essential and enlightening. The process revealed that the managers' major areas of concern were:

1. Tenant isolation and frailty.
2. Site managers' responsibility and limitations in regard to tenants' well-being.
3. Site managers' burden to "keep the peace."
4. "Burn-out" among site managers.
5. Ways to improve resource knowledge and enhance referral systems for tenant needs.
6. Ways to improve personal effectiveness with tenants.

One of the most telling statements to emerge from this group was that of a manager who said, "Making a referral to a social service agency makes you feel so guilty, it feels like a failure." It was obvious that a deeper understanding between agency staff and the managers was of the utmost importance to help define and understand what their mutual goal could be and how they could be achieved.

The plan, which was tailored to meet the needs expressed by the managers, included the following:

1. To help the managers become more knowledgeable and understanding of the aging process, thereby becoming more knowledgeable and understanding of the conditions and needs of their tenants.
2. To share resource information and develop and enhance referral systems, thereby strengthening the lines of communication and service between the tenants, our agency, the company, and the managers.
3. To teach crisis intervention skills, thereby enabling managers to more effectively intervene in tenant situations.
4. To conduct assertiveness training, thereby enabling managers to more effectively interact in their daily management activities.
5. To teach stress management techni-

12. L. Little, and S. Laing, "Resident Services Coordinator: A New Role for Counseling Psychologists in Property Management," *The Counseling Psychologist*, Vol. 13, No. 4, (October 1985), pp. 685-693.

ques, thereby enabling managers to more effectively cope with their daily management stresses.

We suggested day long in-service training workshops as the format with which to begin a training program for the managers. The workshops' agendas were presented to the company for consideration and were approved in total.

The company's managers from all over the area were invited to participate, with full encouragement from the management company. The company's encouragement included guaranteed paid time for the training day for all participating managers. This encouragement not only continues to include a paid work day for the managers, but JFS is now paid a fee by the company for each participant.

From the beginning, agency professional staff has served as the main faculty for the workshops. Various participating staff members have given presentations in the area of their special expertise. Topics were presented in an interesting manner, always leaving much room for questions and discussion. Examples of topics include:

1. Characteristics of the older population:

Demographics

- Who are they?
Family, friends and eventually ourselves, hopefully.
- How many are there?
In the year 2000, one out of every five people will be 65 years old or older.
- Where do they live?
Only 5% live in nursing homes, many are in senior housing.

2. Health changes:

- Sight: The yellowing of the lens is problematic.
- Hearing: Why don't they wear hearing aids?
- Nutrition: Some do survive into their 90's on buns and coffee, but it's not the best way.

-Emotion: Isolation and depression are prevalent.

3. Alternative planning:

- In-home services: How long will they hold?
- Group apartments: What are they?
- Nursing home: When and how to choose.

Of continuing concern in working with the elderly is recognition of the many losses that occur in one's later years. Staff presented conceptual material and led discussions on retirement, relocating, widowhood, and normal and problematic grieving.

Additionally, in every session sensitivity exercises were included. As Cowley states, "Put cotton in your ears and pebbles in your shoes. Pull on rubber gloves. Smear vaseline over your glasses, and there you have it: instant aging."¹³

The inclusion of case vignettes to stimulate dialogue and joint working out of problem-solving strategies proved highly successful and prompted much lively interaction among managers offering various approaches to understanding and resolution of the situations represented. Case examples were introduced with such questions as:

- How to apply what we have learned.
- Do these sound familiar?
- Who talks to the family?
- What do you say?
- What do you do?
- What can be done?

Two examples of case vignettes are:

1. Mrs. G is an 82 year old woman who has been living in her present apartment for six years. Last week, late one night, she walked outside and said she was going to the beauty shop.
2. Mr. and Mrs. S are in their late 70's. They have not been seen as much lately in

13. Malcolm Cowley, "The View from 80." New York: *The Viking Press*, 1980, pp. 3-4.

the building. When they are seen, they seem to have lost a considerable amount of weight.

Twenty managers attended initial training sessions. By acknowledging the demographics, health aspects and ethnic and psychosocial idiosyncracies of this population, group leaders hoped to displace myths and stereotypical prejudices with valid and objective guides for evaluating residents' needs. Through sensitivity exercises the managers could be helped to get in touch with their own feelings about the losses and changes accompanying the aging process. By using the case vignettes and "triggering mechanisms," dialogue was generated and attendee participation stimulated. This afforded members of social work staff the opportunity to reply, reassure, refute or reinforce the attitudes and behaviors of the site managers. The training workshops provided a non-threatening arena in which site managers and social workers could advocate, advance, and exchange suggestions and ideas. These discussions were used by the managers in an honest and open fashion to share their concerns, experiences, and frustrations.

Of special note were the selected presentations and vignettes to describe various cultural and religious traditions, customs and practices. A manager learned of tradition when he alarmingly reported that an elderly tenant appeared suddenly depressed and sad, and refused to shave or attend a party in one of the buildings. Upon further investigation it was found that he was marking the anniversary of the death of his wife; he was observing her *yahrzeit*.

Intrinsic to each training series were the segments devoted to skills development such as assertiveness training exercises, stress management exercises, and crisis intervention skills. Various techniques were used in a multidimensional approach, including imagery and visualization, muscle relaxation, and role play, to name a few.

Agency staff and building managers having shared in a cohesive group experience, developed a sense of partnership. The managers' desire and willingness to continue to participate in the training were evident and constant. Examples of their evaluative remarks include the following: Important things I learned in the workshops were:

- a. to keep an awareness of our relationship to our tenants
- b. ways to assist us in handling and understanding problems of tenants
- c. managers and JFS have the well-being of tenants in common
- d. we can work together to improve the lives of tenants
- e. stress management techniques can work.

The management training initiative is a cooperative venture between a private for-profit management company and a voluntary, non-profit social service agency. Two structural elements have operated to administer programs. The position of coordinator of Senior Congregate Housing was created at JFS to act as liaison to the management company and to the managers for line staff who relate to managers on an individual case basis. A committee of four to six managers was formed to work with agency staff to plan agendas and workshops.

Their experience has helped the two organizations deliver services to "mutual clients," the tenants, more effectively. Communication is open and comfortable. Participants have learned to actively discuss differences of opinion and work toward solutions in a more reciprocally understanding way. Information and referrals are processed more quickly and more knowledgeably. Better understood is the mutuality of concern for the tenants' well-being by both management company and social service agency. Information and resource sharing continued during and informally between sessions among managers

and staff, developing a sense of "support" and "partnership."

The agency is encouraged with the responses and results of our project. Its work can serve as a prototype for other collaborative ventures in training building managers serving the elderly. A training manual is presently being developed for use by individual trainees, with an addendum for use by trainers. The JFS curriculum may become part of a national model as well as a model for the State of Maryland. During the 1986 legislative session of the Maryland General Assembly, a bill (HB 1863) was approved, creating the Maryland Senior Housing Managers Training Program. The law has authorized the Maryland Office on Aging to develop a training program for individuals who manage housing facilities for the elderly.

JFS lobbied on behalf of this legislation and is looking forward to further participation in helping with the development of a state-wide program. Its management training project is a prime example of agency foresight and capability in creating, developing, and delivering quality programming and services to its community. As in this case, working in partnership with a proprietary for-profit company and with the public sector, a private non-profit social service agency is continuing to perform its "traditional role: namely, pioneering innovative and creative approaches to social welfare and offering people freedom of choice and quality service."¹⁴

Jewish tradition is incorporated with sound professional philosophy in a pro-

14. Baltimore Jewish Family Services, "Position Statement on Public-Private Partnership," January 28, 1987.

gram that has proven beneficial to all involved. As Leivy Smolar states, "The Jewish tradition deliberately points to the heart of the care of old people: that we know how frightened they are of abandonment; how important it is that they stay among us as long as possible . . . It is largely a gentle tradition which affirms life and strengthens hope, which values old age, and which has called upon us over the centuries to cushion the advent of the inevitable, to support the living, to urge respect for the old . . ." ¹⁵

Gerontology promises that continued psychological resolution and growth are possible at any age. Judith Viorst, in her book *Necessary Losses*, writes, "Psychoanalysts report that psychoanalysis with the elderly has helped their patients retrieve their sense of self-worth . . . has helped them find new adaptations when old age has rendered their past adaptations unworkable . . ." ¹⁶

Birnbaum says, "In primitive times, age was a necessary condition for authority."¹⁷

An opportunity to learn from such an "authority" was given in the revealing and inspirational statement of a 76-year-old woman who was asked "Why are you seeking therapy at your age?" Reflecting both her losses and hopes, she answered unforgettably, "Doctor, all I've got left is my future."¹⁸

15. Leivy Smolar, op.cit., p. 7.

16. Judith Viorst, "Necessary Losses." New York: Simon & Shuster, 1986, p. 303.

17. Philip Birnbaum, "Book of Jewish Concepts." New York: *Hebrew Publishing Co.*, 1964, p. 197.

18. Martin Berezin, "Psychotherapy of the Elderly," *Aspects of Aging*, No. 4, Unpagged.