

# Certificate in Family Services

**Pennsylvania Housing Finance Agency**

Special Achievement

**HFA Staff Contact**

Nicole Timbers

[ntimbers@phfa.org](mailto:ntimbers@phfa.org)

## **Special Achievement**

**Need and Innovation:** The U.S. Department of Housing and Urban Development (HUD) recognizes the need for service coordinators to diversify their skill set to be able to manage the complex scenarios they may face daily. Here in Pennsylvania, it was realized that there was a lack of affordable supportive services training opportunities. This has become a point of frustration for all players involved in affordable housing development, as not only does HUD have service coordinator requirements, but the Pennsylvania Housing Finance Agency (PHFA) also requires supportive services at Low Income Housing Tax Credit (LIHTC) properties. Properties face the challenge of not only being able to afford having an onsite supportive services coordinator, but those coordinators may lack the necessary training, which ultimately impacts the services provided to tenants.

Recognizing the need for affordable training, PHFA set out to meet the needs of the service coordinators working with families. In 2016, using feedback from those already working at the properties, and leaders in the field of supportive services, PHFA launched the Certificate in Family Service Coordination (CFSC) program.

PHFA partnered with California University of Pennsylvania's Master's in Social Work (MSW) department to create this program. Courses are directed at issues associated with populations residing at general occupancy/family properties. Participants obtain the required educational courses through a combination of virtual learning and attendance at PHFA's Multifamily Affordable Housing Conference, which is an annual conference that provides educational opportunities to housing services coordinators, property managers and other stakeholders in affordable housing. The virtual learning consists of monthly webinars that are recorded. If a participant is unable to participate in a live webinar, he/she is required to watch the recorded webinar at his/her convenience and take a short quiz in order to receive credit. The cost to complete CFSC and receive a certificate is \$50.

**Partnerships:** PHFA regularly partners with colleges and universities throughout Pennsylvania on various initiatives. In this instance, PHFA already had an established relationship with the California University of Pennsylvania, and they were willing to assist in the design and development of the curriculum and to provide the CFSC certificates to participants who satisfactorily complete the mandatory 20 hours of educational training in one year. As a result of this partnership, the basic goals of CFSC are to:

- Create an affordable training opportunity for all service coordinators.
- Improve service coordinator's expertise in serving residents at general occupancy properties.
- Establish a base level of knowledge to improve service delivery statewide.

In addition to PHFA's partnership with the California University of Pennsylvania, many individuals and organizations agreed to participate as instructors in the CFSC program. Organizations such as BluePrints of Washington County, Allegheny County Department of Human Services, and private counseling practices have provided curriculum and presenters for the program. The CFSC program also partners with professors from local universities.

As part of the initial process to design the CFSC curriculum, PHFA conducted a focus group and invited veteran service coordinators, property management companies, representatives from the department of human services and HUD representatives to provide input regarding course design and curriculum. A total of 22 people participated in a focus group to refine topics related to continuing education and content delivery strategies.

**Effective Use of Resources:** Development of the curriculum was accomplished in consultation with several professors of social work with the California University of Pennsylvania, as well as experts in the field of family supportive services. The program lasts one (1) year with the curriculum consisting of 20 hours of training through the following 13 core modules:

- Manager and Service Coordinator Relationship & Confidentiality
- Ethics & Boundaries
- Diversity and Inclusion
- Service Coordinator and Liability: Documentation
- Service Coordinator 101 Basics
- Mental Health and Housing
- Collaboration and Safe Communities
- Budgeting / Financial Goal Setting and Education
- Family Dynamics
- Effectively Communicating
- Helping Families Access Specialized Services
- Substance Abuse and the Family
- Domestic Abuse and the Family

Upon establishment of the curriculum, CFSC was implemented by PHFA's Housing Services Department. These webinars are available exclusively through the CFSC program, allowing participants to obtain a specialized curriculum at an affordable cost.

PHFA took advantage of its existing webinar capacity through the WebEx platform to deliver approximately 85% of the 20 hours via virtual learning, making it very attractive to both employers and CFSC participants. This became ever more beneficial when the pandemic hit in early 2020. PHFA was able to continue the CFSC with no disruption of courses. When the next cohort began, PHFA was not certain how the 2021 Multifamily Affordable Conference would be held, as the world was in uncertain times. As it became clear that the conference would need to be virtual instead of in person, the CFSC program was able to endure, and participants were required to attend the first ever virtual PHFA Multifamily Affordable Housing Conference. Moving forward, PHFA will continue to offer about 85% of the courses virtually via webinar and the remaining classes will be incorporated into the in-person conference. However, it must be noted that whether the conference is in person or held virtually, there is no additional cost incurred by PHFA, the employer or the participant. By building on these opportunities, PHFA has structured a very affordable comprehensive baseline training program in family service coordination.

**Benefits that Outweigh Costs:** The benefits of CFSC to management agents and service coordinators are to ensure that:

- They have a baseline level of training and expertise in family service coordination despite varying educational or experiential backgrounds.
- Management agents have a system to provide support and training to newly hired service coordinators.
- A Networking vessel for service coordinators to connect with others in the same field.

For the management agent/owner, these benefits are achieved with minimal time away from work by the service coordinator and an insignificant budgetary impact. For PHFA, the benefit is to have a system

in place that ensures the availability of a basic level of expertise by service coordinators across its family portfolio.

**Achieve Intended Results:** To date 132 participants completed all CFSC requirements and received their certificates from the California University of Pennsylvania and there are 50 more expected to graduate in June 2022. This brings our total to 182 graduates in the five years the program has been active. CFSC graduates provide supportive services at affordable family/general population properties in states outside Pennsylvania, including Ohio and New Jersey. The 132 successful participants directly provide supportive services to over 2,500 residents at their properties. The knowledge they gained by successfully completing CFSC has enabled them to assist their residents in obtaining individualized levels of self-sufficiency as well as remain safely housed.

Upon completion of CFSC, participants were surveyed regarding curriculum content, benefits, and relevancy of CFSC. With responses from more than three-fourths of CFSC graduates:

- 100% stated that the curriculum was relevant to their position.
- 100% reported that they benefited from CFSC related to professional development and hiring capacity.
- More than 42% participated in CFSC as part of the training requirements for their current position (reflecting the value that employers/management agents place on CFSC).
- 39% of supervisors that were polled either require or plan to require the CFSC program as part of their new hire process.

Feedback received from graduates continues to help fuel the program. As a former graduate stated, “With operational budgets being constrained as of lately in the affordable housing industry, it is vital that staff has opportunities to attain applicable field specific knowledge for free or at an affordable price. These programs allow for that. They also allow for opportunities to connect to other like professionals in the field and to learn of new networking groups from which to gain further knowledge and learn from others’ experiences.” PHFA’s goal with this program is to ensure those working with the families on the properties have the tools needed to successfully empower residents.

**Future/Replicability:** Based on these overwhelming approval ratings from participants and the continued participation of the California University of Pennsylvania, PHFA plans to continue the CFSC program. PHFA will continue to solicit input from participants, management agents and other relevant parties. Curriculum updates will be made as important issues arise and the ways of doing service coordination are impacted by other forces. For example, the Drug Abuse module continually gets updated as the myriad of available drugs and paraphernalia grows, the module content must stay current. CFSC has been a unique response to a recognized need. It is one that has been beneficial to CFSC participants, their employing management agents, PHFA and, most importantly, the residents who are directly impacted by CFSC graduates.

We believe CFSC is not unique to Pennsylvania, but rather a cooperative concept and program that can be replicated in other states to better assist residents at family properties. It is a program with a recognized record of success that can easily be adopted by other states at a minimal cost. PHFA is willing to assist other state housing finance agencies develop and implement this training.

Visual 1

**Course: Accessing Services for Families**

**Delivery: WebEx Recording Delivered July 2020**

**Instructor: Mallory McHugh**

**Hours: 1.5**

**Objectives:**

1. Discuss the concept of Specialized Services
2. Discuss treatment and intervention options for families with problematic behaviors
3. Discuss special education programs and other services
4. Discuss cross-functional supports and services available to families

**Mallory McHugh** is a two-time California University of Pennsylvania graduate holding a BA in Sociology and a Master's in the Art of Teaching. Mallory serves as Supervisor at Blueprints, a Family Centered Non-profit social service agency located in Washington PA. Mallory and her team work to help families achieve their goals and reach financial stability.

Visual 2

**Course: Mental Health and the Family**  
**Delivery: Webex Meeting August 2020**  
**Instructor: Dawn Bartha, BS, MEd, HCCP**  
**Hours: 1.5**

**Objectives:**

1. Discuss the most common signs of Mental Health issues
2. Discuss the common interventions that may be used to help families affect by mental health issues in the home
3. Learn about various resources available for professionals and family caregivers
4. Discuss the symptoms of mental health and how it affects the family unit

**Dawn Bartha** holds a BS in Psychology from Slippery Rock University with a minor in Women's Studies and a Master's of Education in Counseling from Duquesne University. During her time at Slippery Rock, Dawn co-authored a study entitled: "College Students Perceptions of the LGBT Community", which was featured at that Pittsburgh Psychology Association Conference. During her graduate work, she focused on "at risk" students, ensuring they were equipped with the skills and resources needed to succeed. Her diversified experience includes case management, in home therapy and behavior modification, home care for those with Alzheimer's and traumatic brain injuries and classroom education prek-12<sup>th</sup> grade. In addition, Dawn has extensive experience in affordable housing, working as a resident service coordinator for over 4 years before moving to Pennsylvania Housing Finance Agency as the western Pa Housing Services Representative. Here, Dawn continues to be an advocate for services to ensure individuals can obtain self-sufficiency and age in place. Dawn enjoys spending time with her family, volunteering as a community sports coach, reading mindless mysteries, and daydreaming about traveling the world!

Visual 3

**Course: SC and Liability: MGR/SC Relationship & Confidentiality**

**Delivery: September 2020 Webinar**

**Instructor: Kimberly A. Fry, BS in Business, BS in Humanities**

**Hours: 1.5**

**Objectives:**

At the end of the course, participants will be able to:

1. Identify how the roles of the MGR/SC are similar and different
2. Discuss the components of a good working relationship
3. Define confidentiality and its importance for the SC
4. Identify specific strategies to maintain confidentiality

**Kimberly A. Fry, President of Kimberly Fry Consulting Services Inc. has over thirty years of professional experience in all aspects of housing and community development related activities. Having held leadership positions in public, private and non-profit organizations, Kim's experience includes real estate finance and development, property management operations, marketing and lease-up strategies, supportive service provision, and corporate training and organizational development. Specializing in affordable housing, she has underwritten multifamily real estate deals across the country utilizing a myriad of financing programs, has managed substantial loan funds, delivered numerous presentations on real estate finance and the development process, property management and supportive services delivery.**

Currently, Kim provides contracted services to various property management organizations, assists both for-profit and non-profit companies with training and organizational strategies to improve overall operations. She also teaches a Master's-level course for Rutgers University, School of Social Work – a curriculum designed by Ms. Fry in collaboration with Rutgers and the New Jersey Housing and Mortgage Finance Agency. Prior to creating her own consulting firm, Kim ran the property management operations for Pennrose Management Company, a large, nationally recognized property management firm with 450 employees consisting of 140 properties valued at over \$1B located in 10 states.

Visual 4

**Course: Service Coordination and Liability: Ethics and Boundaries**

**Delivery: October 2020 Webinar**

**Instructor: Ronald Costen, Ph.D.**

Hours: 1.5

Objectives:

At the end of the course, participants will be able to:

1. Define ethics
2. Demonstrate the core values of the service coordination profession
3. Understand values and how they relate to ethics
4. Define appropriate service coordination boundaries

**Ronald Costen** is the Legal and Forensic Consultant on Protective Services at Temple University and Professor Emeritus of Social Work. He is both an attorney and social worker specializing in the problems of elder victimization. Dr. Costen received his Doctor of Philosophy Degree from the University of Pittsburgh and his law degree from Temple University. He has been a graduate school faculty member for over 30 years and has practiced law for 29 years. Dr. Costen's law practice has focused on the prosecution of those who victimize people with special needs such as older Pennsylvanians, people with developmental disabilities, and children. He served as an Assistant District Attorney in Lackawanna County and as a Pennsylvania Deputy Attorney General in the Criminal Law Division for 9 years. He also assists in the drafting and enactment of legislation designed to better protect populations that are at high risk of being victimized. He serves as a consultant to numerous groups and organizations in Pennsylvania and is a member of the Pennsylvania Supreme Court Elder Justice Task Force.

Visual 5

**Course: Collaboration and Safe Communities**

**Delivery: Webex Recorded Webinar, November 2020**

**Instructors: Bethany Friel, Kara Rea and Montia Robinson**

Hours: 1.5

**Objectives:**

Service Coordinators to gain an understanding of organic and nontraditional ways to collaborate for safety in communities and to be provided with tangible next steps for immediate utilization as needed.

1. How does collaborating in nontraditional ways lead to enhanced safety for everyone?
2. Ways to empower neighborhoods and communities to self-regulate on safety.
3. Evidence based practice methodology

**Bethany Friel** has a strong foundation in social work that includes 20 years of serving families and individuals in the Greater Pittsburgh region and beyond. Bethany has become a leader in housing programs and the delicate circumstances of housing in marginalized communities/neighborhoods. She earned her Master's in Social Science Administration from Case Western Reserve University in Cleveland, Ohio, and has worked in a variety of community agencies in the Pittsburgh area including providing direct services and leadership to transitional and permanent supportive housing programs.

Bethany Friel joined TREK Development Group in 2014 as the Supportive Services Coordinator and now serves as the Director of Mission, Culture and People. She is responsible for company strategic planning efforts, staff leadership and growth initiatives, community engagement for planning and development efforts, supportive services for residents and human resources.

Bethany brings her social skill set in the art of empathy and humanism to the field of property management that is largely immersed in logical analytics and numerical data. Her ability to keep empathy & social insight in the same conversations as (income and compliance centric operations), and strategic planning lend to a holistic company approach that sees tangible gains. Through this partnership, TREK has developed a human-centered culture in a Property Management company that meets TREK's mission to Create Value, Enhance Lives and Strengthen Communities.

**Kara Rea** is the Community Manager for Thomas Village Apartments and Jeremiah Village. Both are affordable communities north of Pittsburgh. Kara has a degree in Social Work from The Ohio State University and has been working in the area of housing, in one way or another for over 20 years. Kara is a wife and has three children; two in high school and one in Elementary who keep her busy outside of work. She enjoys running, reading books and magazines and recently has started watching Downton Abbey with her daughter.

**Ms. Montia Robinson-Dinkins** is currently the Senior Community Builder and Diversity, Equity, and Inclusion Manager for Trek Development Group. In this role, she utilizes her skill set to train staff in diversity and inclusion practices, while creating and supporting human-centered approaches to enhance the lives of residents in Western Pennsylvania mixed income communities. As a certified Diversity, Equity, and Inclusion professional from Cornell University, Robinson-Dinkins is leading conversations to empower meaningful impact in Pittsburgh's community network, charged with building affordable housing spaces.

Visual 6

**Course: Budgeting/Goals/Employment and Education**

**Delivery: Webex Delivered January 21, 2021**

**Instructor: Holly Zugay (Chase)**

**Hours: 1.5**

**Objectives:**

1. Learn basic budgeting skills that can be shared with families as a tool
2. Learn basic goal setting skills that can be shared with families as a tool
3. Discuss current educational and employment opportunities

**Holly Zugay** is a seasoned financial educator, writer, and presenter specializing in community-based financial education for adults. She has worked with national, state, and local non-profit organizations and government agencies in the areas of financial education program development, training, and outreach; trained over 1700 educators, counselors, and social workers in financial content and delivery; and delivered over 200 financial education workshops to Pennsylvania consumers. Ms. Zugay has extensive experience with at-risk populations including, low-income families in subsidized housing, homeowners facing foreclosure, veterans transitioning from homelessness, ex-offenders preparing for re-entry, and people with disabilities.

Ms. Zugay co-authored the EIFLE™ Award winning program, Right On the Money and was nominated for the Secretary's Award for Excellence by the Pennsylvania Department of Banking.

Ms. Zugay is currently the senior financial education officer with the Pennsylvania Housing Finance Agency (PHFA). In this capacity, she leads the financial literacy initiatives and training across the organization, including housing counseling and education, housing services, and mortgage servicing divisions. Ms. Zugay designed PHFA's flagship pre-purchase financial education program, Building Your Financial House, and the online borrower-delinquency prevention course, Securing Your Financial House. She also provides professional development, curriculum consultation, and outreach to national, state, and local housing community stakeholders and partners.

Ms. Zugay began her financial career as an advisor with American Express Financial Advisors (now Ameriprise) and Merrill Lynch, followed by housing counseling and education with the Housing Alliance of York. Prior to joining PHFA, she spent several years with the Pennsylvania Office of Financial Education, supporting the financial education efforts of community-based organizations.

Ms. Zugay holds a BS degree in chemistry from the University of Wisconsin and is a Certified Financial Planner™ certificate.

Visual 7

**Course: Intimate Partner Violence and the Family**

**Delivery: Webex Meeting February 2021**

**Instructor: Kristy Carnahan, MEd, IPC, NCC**

**Hours: 2 hours**

**Course Objective:**

At the end of this course participants will be able to:

1. Learn how domestic abuse affects the whole family
2. Learn what families can do for help
3. Learn why all family members need support to stop domestic abuse
4. Learn about education, counseling and domestic abuse support group options

**Kristy Carnahan** is a licensed professional counselor who has been working with trauma survivors for over 20 years. She has degrees in linguistics and counselor education, and has worked as a victim advocate, legal advocate, supervisor, director, consultant, and private practice therapist. After obtaining a master's degree in Community Counseling at Duquesne University, she earned credentialing as a Nationally Certified Counselor and is a graduate and faculty member of the Gestalt Therapy Institute of Pittsburgh. She is currently a therapist in private practice in the Squirrel Hill neighborhood of Pittsburgh.

Visual 8

**Course: Family Dynamics: Identifying family types, assessing family needs and supporting healthy family functioning**

**Delivery: Webex Webinar, March 2021**

**Instructor: Amanda Stengel, M.A., MFT**

**Hours: 1.5**

**Objectives:**

At the end of the course, participants will be able to:

1. Define and Outline Family Dynamics
2. Outline Family Types and Types of Relating
3. Have a basic understanding of person centered counseling
4. Understand Challenges and limitations of working with families

**Amanda Stengel** is a Housing Services Representative for the Pennsylvania Housing Finance Agency where she monitors Supportive Services across Philadelphia, Montgomery and Bucks counties. Amanda is also a Master's level Marriage and Family Therapist who works with individuals, families and couples to create meaningful change in their relationships with self and others. Ms. Stengel is an educator at heart and has coached individuals and families in various capacities for more than 15 years. Amanda has worked in direct support of adults in memory care, families navigating life with neurodiversity and has counseled individuals with substance use and abuse disorders. Amanda has also served to coordinate Social Services for families in multifamily housing communities in Pennsylvania. Amanda received a bachelor's degree in Psychology and Social Sciences from Penn State University and a Master's degree in Marriage and Family Therapy from LaSalle University's school of Professional Counseling.

Visual 9

**Course: Drugs and Family Practice**  
**Delivery: Webex Webinar, April 2021**  
**Instructor: Ramona Cholak Jenks, BSW**  
**Hours: 1.5**

**Objectives:**

At the end of the course, participants will be able to:

1. Understand why people use drugs
2. Outline the impact of drug use on the family system
3. Discuss the current trends in drug use
4. Examine how we as service coordinators and property managers can help

As an adult with two young children, **Ramona** attended West Virginia Northern Community College (WVNCC) in Wheeling, WV majoring in elementary education. While at WVNCC, she was inducted into several honor societies (Pi Gamma Mu International Social Services Honor Society, Phi Alpha Theta International History Honor Society, and Phi Theta Kappa International Honor Society which nominated her to the *Phi Theta Kappa/USA Today 1993 Academic All-American Team*). Upon completion of her work at WVNCC, Ramona was named *Outstanding Student in the Liberal Arts Division*, nominated as *Alumni Association Outstanding Graduate*, and selected as a 1993 honoree for the *YWCA Tribute to Women*. She graduated with honors as Class of 1993 Valedictorian.

Following WVNCC graduation, Ramona continued to work toward her degree in elementary education at Bethany College, Bethany, WV. After nearly completing it, she changed her major to social work with a minor in visual arts. At Bethany, she was awarded a Senior Fellowship in the Department of Professional Studies and garnered several awards for her artwork. She completed several internships in social services (Fox Run Hospital, Presbyterian SeniorCare, and in the Alzheimer's unit at Family Services of the Upper Ohio Valley). Ramona earned a bachelor's degree in social work from Bethany College and graduated with honors in 1996.

Ramona began her professional career managing the volunteer programs at Washington Women's Shelter and the C.A.R.E Rape Crisis Center. Through the Family Center of Southwestern PA Human Services (SPHS), she facilitated parenting education using *The Incredible Years* program. She began her current line of work in 1999 with Neighborhood Drug Awareness Corps where she earned a certification in alcohol, tobacco, and other drug prevention. Prior to her current position with Washington Drug and Alcohol Commission (WDAC), Ramona was employed by several other local agencies. She was Family Group Decision Making coordinator and director of Residential Services for Try-Again Homes (now BluePrints), and a supervisor in the after-school tutoring program with Pittsburgh Public Schools through Huntington Learning Center. Ramona has been with WDAC since 2012.

Visual 10

**Course: Effective Communication**

**Delivery: Webex Webinar May 2021**

**Instructor: Dawn Bartha, BS, MEd, HCCP**

**Hours: 1.5**

**Objectives:**

- 1. Define Communication and the process of communication**
- 2. Define and Understand Active Listening**
- 3. Understand Barriers to Effective Communication**
- 4. Tips on Improving verbal and non-verbal communication**

**Dawn Bartha** holds a BS in Psychology from Slippery Rock University with a minor in Women's Studies and a Master's of Science in Educational Counseling from Duquesne University. During her time at Slippery Rock, Dawn co-authored a study entitled: "College Students Perceptions of the LGBT Community", which was featured at that Pittsburgh Psychology Association Conference. During her graduate work, she focused on "at risk" students, ensuring they were equipped with the skills and resources needed to succeed. Her diversified experience includes case management, in home therapy and behavior modification, home care for those with Alzheimer's and traumatic brain injuries and classroom education prek-12<sup>th</sup> grade. In addition, Dawn has extensive experience in affordable housing, working as a resident service coordinator for over 4 years before moving to Pennsylvania Housing Finance Agency as the western Pa Housing Services Representative. Here, Dawn continues to be an advocate for services to ensure individuals can obtain self-sufficiency and age in place. Dawn enjoys spending time with her family, volunteering as a community sports coach, reading mindless mysteries and daydreaming about traveling the world!

Visual 11

**Core Course: Sensitivity Awareness: Sexual, Cultural, & Spiritual Diversity**

**Delivery: June 2021 Webinar**

**Instructors: Deborah Gable, Montia Robinson, Terri Clark, MPH**

**Hours: 2**

**Objectives:**

At the end of the course, participants will be able to:

1. Define diversity as it relates to sexuality, cultural, racial and economic factors
2. Identify issues of prejudice, bias, or stereotypes
3. Explain why recognizing diversity is important in service coordination

**Deborah Gable** is the Vice President of Resident Services at HDC MidAtlantic, where she has led the resident services department for 8 years. Ms. Robinson-Dinkins is currently the Senior Community Builder and Diversity, Equity, and Inclusion Manager for Trek Development Group. In this role, she utilizes her skill set to train staff in diversity and inclusion practices, while creating and supporting human-centered approaches to enhance the lives of residents in Western Pennsylvania mixed income communities. As a certified Diversity, Equity, and Inclusion professional from Cornell University, Robinson-Dinkins is leading conversations to empower meaningful impact in Pittsburgh's community network, charged with building affordable housing spaces.

**Terri Clark, MPH** - Terri is an accomplished public health advocate, trainer, program planner, and facilitator with nearly 30 years of experience. Her areas of focus include human sexuality, with a specialty in LGBTQ issues, HIV prevention, sexual health, and older adult sexual expression. Terri manages a portfolio of projects that aim to improve understanding of these topics among diverse community member to bring the knowledge gap and ensure inclusivity. She is a consultant trainer, which includes her work as a certified trainer with SAGE, the world's largest and oldest organization dedicated to improving the lives of LGBT older people.

Terri is co-author/editor of "25 Great Lesson Plans about Sexual Orientation" and the expanded version, "Orientation: Teaching about Identity, Attraction and Behavior".

Terri is a graduate of Hunter College with a master's in public health, community health education. She received her B.A. in sociology and

Visual 12

**Course: SC and Liability: Documentation**

**Delivery: Conference Session; July 2021 Virtual Multifamily Affordable Housing Conference**

**Instructors: Kimberly A. Fry, Shannon Mowery**

**Hours: 1.5**

**Objectives:**

At the end of the course, participants will be able to:

1. Have a better understanding of the importance of proper documentation
2. Define what information is required to be documented
3. Learn how to document efficiently

**Kimberly A. Fry**, President of Kimberly Fry Consulting Services Inc. has over thirty years of professional experience in all aspects of housing and community development related activities. Kim's experience includes real estate finance and development, property management operations, marketing and lease-up strategies, supportive service provision, and corporate training and organizational development. Specializing in affordable housing, she has underwritten multifamily real estate deals across the country utilizing a myriad of financing programs, has managed substantial loan funds, delivered numerous presentations on real estate finance and the development process, property management and supportive services delivery.

Currently, Kim provides contracted services to various property management organizations, assists both for-profit and non-profit companies with training and organizational strategies to improve overall operations. She also teaches a Master's-level course for Rutgers University, School of Social Work – a curriculum designed by Ms. Fry in collaboration with Rutgers and the New Jersey Housing and Mortgage Finance Agency. Prior to creating her own consulting firm, Kim ran the property management operations for Pennrose Management Company, a large, nationally recognized property management firm with 450 employees consisting of 140 properties valued at over \$1B located in 10 states.

**Shannon Mowery** is currently the VP of Supportive Services and previously served as Director of Supportive Services since January 2015. In this role she oversees all aspects of Supportive Services for Pennrose, including the development of Supportive Services plans, delivery of services at all properties, as well as coordinating any activities and communications with company affiliates as they relate to supportive services. Shannon began her career with Pennrose Management Company in June 2002 as Supportive Services Coordinator, where she coordinated and facilitated supportive services activities and training including health and wellness, human service needs, as well as recreational activities.

Shannon has more than 19 years of Supportive Services experience working in varied fields. Before joining Pennrose she was the Family Living Program Coordinator for Threshold Rehabilitation Services, where she was responsible for assigned family living providers and consumers to ensure all safety measures were being met, advocated on the behalf of persons with disabilities, as well as conducted monthly pre-service trainings to assure compliance with all state and agency regulations.

Shannon serves on the Board of Directors of the Pennrose Foundation, a nonprofit charitable organization that further enhances the company's mission of transforming communities. She holds a Bachelor of Science Degree in Biobehavioral Health with a minor in Human Development and Family Studies from Pennsylvania State University and has recently been certified as a Mental Health First Aid Instructor.

Visual 13

**Course: Service Coordination: What you Need to Know**

**Delivery: PHFA Multifamily Affordable Housing Conference: Webex Webinar, July 2021**

**Instructor: Dawn Bartha**

**Hours: 1.5**

**Objectives:**

1. Explore what service coordination is and how it applies to affordable housing
2. Compare the service coordinator and property manager roles
3. Understand the importance of communication
4. Examine the importance of engagement
5. Identify Common Resources

**Dawn Bartha** holds a BS in Psychology from Slippery Rock University with a minor in Women's Studies and a Master's Science in Educational Counseling from Duquesne University. During her time at Slippery Rock, Dawn co-authored a study entitled: "College Students Perceptions of the LGBT Community", which was featured at that Pittsburgh Psychology Association Conference. During her graduate work, she focused on "at risk" students, ensuring they were equipped with the skills and resources needed to succeed. Her diversified experience includes case management, in home therapy and behavior modification, home care for those with Alzheimer's and traumatic brain injuries and classroom education prek-12<sup>th</sup> grade. In addition, Dawn has extensive experience in affordable housing, working as a resident service coordinator for over 4 years before moving to Pennsylvania Housing Finance Agency as the western Pa Housing Services Representative. Here, Dawn continues to be an advocate for services to ensure individuals can obtain self-sufficiency and age in place. Dawn enjoys spending time with her family, volunteering as a community sports coach, reading mindless mysteries, and daydreaming about traveling the world!

Visual 14

**Certificate in Family Service Coordination  
A Partnership between PHFA and  
California University of Pennsylvania Rural Communities Institute**

**Concept:** PHFA has partnered with the Rural Communities Institute of California University of Pennsylvania to offer a certification for Service Coordinators that work with families in affordable housing. Our goals are to:

- Create an affordable training opportunity for new or experienced Service Coordinators.
- Improve Service Coordinators' expertise in serving families in residential settings.
- Establish a base level of knowledge in order to improve service delivery statewide.

**Need:** PHFA's interest in developing a Certificate in Family Service Coordination was based on the following experience within the PHFA portfolio:

- Staff members that fill Service Coordinator positions and the service coordinator role vary widely in their backgrounds and experiences.
- Employers/management agents do not always offer sufficient levels of support and training to newly hired staff in these positions and roles.
- Inexperienced staff is often asked to act in a service coordination role without any training or experience.
- Service Coordinators funded through HUD Service Coordination grants are required to complete 36 hours of classroom/seminar time in specified subject areas prior to or within 12 months of hiring. Thereafter, they are required to complete 12 hours of continuing education annually.

**Opportunity:** PHFA coordinates an annual conference with 10.5 hours of educational sessions outside of the general sessions. The Housing Services Department also offers period web-based sessions and workshops on topics related to Service Coordination and affordable housing. By building on these opportunities, PHFA has structured a very affordable and comprehensive training program in the area of Family Service Coordination. While there are several other training opportunities available, for organizations that already utilize the PHFA Housing Services training systems, this Certificate provides an increased value to expenses already incurred.

**Content:** The curriculum consists of 20 hours of training in the following core areas:

- Mgr/SC Relationship & Confidentiality
- Ethics & Boundaries
- Diversity
- SC and Liability: Documentation
- SC 101 Basic
- Mental Health
- Safe Communities
- Budgeting / Goal Setting/Education and Employment
- Family Dynamics
- Communicating Skills
- Helping Families Access Specialized Services
- Substance Abuse and the Family
- Domestic Abuse and the Family

**Certificate Process:** Registration for the certificate program is now open and must be received by May 15, 2022. There will be a minimum of 2 core courses at the 2022 conference with the remaining courses of content offered via monthly webinars following the conference. The additional courses will be offered at no charge. Once all 20 hours of content are completed, participants may apply for their Certificate by submitting a \$50 processing fee.

In order to participate in the certificate program, enrollees **are required** to attend the 2022 Multifamily Affordable Housing Conference that is being held on June 8<sup>th</sup>, 9<sup>th</sup>, and 10<sup>th</sup> at the Kalahari Resort & Conference Center in Pocono Manor, PA.

**To Get Started:** Contact Dawn Bartha at 412-429-2847 or [dbartha@phfa.org](mailto:dbartha@phfa.org).