

Creating Tomorrow's Quality Healthcare Workforce

A Three-Year Strategic Vision for the
SEIU United Healthcare Workers – West
and Joint Employer Education Fund

SEPTEMBER 2011



SEIU UHW-WEST & JOINT EMPLOYER
EDUCATION FUND

SEIU-UHW West and Joint Employer Education Fund

INTRODUCTION

This is an exciting time for the Education Fund. Over the last six years, we have established ourselves as a national leader in Creating Tomorrow's Quality Healthcare Workforce. We have a strong track record of providing relevant, high quality education and training programs for an increasingly diverse healthcare workforce. We are especially proud of the positive impact we have had on the lives and careers of the 42,000 employees we have served since 2006.

The healthcare sector has an increasing need for a highly-trained workforce including allied health and direct care workers. This critical need will become even more pressing as healthcare reform is implemented. The Education Fund is uniquely positioned to address these new challenges.

Under the guidance of our new Board of Trustees, the Education Fund is launching a comprehensive, three-year strategic plan. The following pages offer an introductory look at that plan, including our strategic priorities, implementation steps, and the values that guide our work. As always, we welcome your comments, input and partnership as we move forward.

Sincerely,

Elizabeth Toups



Elizabeth Toups

*Executive Director
Education Fund*

Who We Are

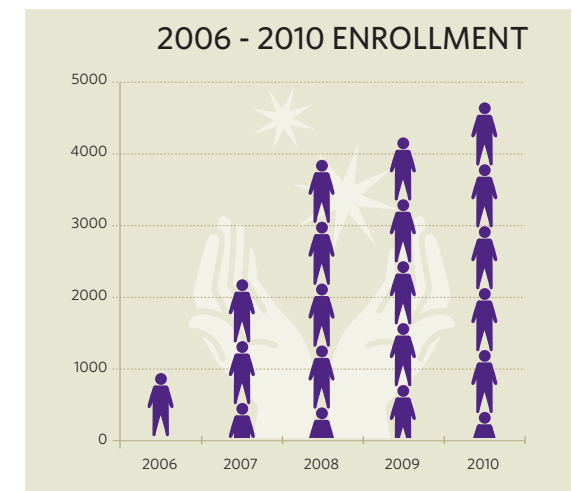
- Over 71,000 Eligible Members
- 6 Unions
- 30+ Employers
- 5 States

OUR HISTORY

The Shirley Ware Education Center, SWEC, was founded by SEIU UHW-West in 1998 with funding from the city of Oakland. SWEC focused on increasing career upgrade training opportunities for the benefit of healthcare employees, and filling existing skills gaps in the healthcare workforce.

In December 2004, SEIU UHW-West joined with a number of employers to create the **SEIU UHW-West & Joint Employer Education Fund**. SWEC has since been integrated into the Education Fund and provides access to grants for additional programs and training opportunities.

Since 2005, the Education Fund has grown into a multi-state organization offering career counseling and training programs to thousands of healthcare employees every year. Programs range from helping people explore their first steps in education, to providing multi-year training programs that include tuition, books, stipends, and comprehensive case management.



Vision, Mission and Strategic Priorities

VISION STATEMENT

Created and sustained through union and employer collaboration, the SEIU United Healthcare Workers-West and Joint Employer Education Fund is a premier educational organization that is valued by all stakeholders. The Education Fund provides education and training programs to help eligible workers improve their lives and careers, while enhancing participating employers' ability to attract, develop and retain a talented workforce.

In pursuit of its mission to develop the finest healthcare employees, the Education Fund offers quality programs that are informed by healthcare trends, address employers' needs, match workers' professional aspirations, and promote excellent patient care.

MISSION STATEMENT

Our mission is to provide education and training that maximizes healthcare workers' talents, proactively meets current and future workforce needs, and assures quality patient care.

STRATEGIC PRIORITIES

1. **Track Healthcare Workforce Trends:** The Education Fund will increase its capacity to identify current and future workforce trends.
2. **Strengthen Stakeholder Partnership:** The Education Fund will improve employee and employer engagement with the Fund.
3. **Provide Value for All Members:** The Education Fund will develop relevant programs to address the needs of eligible workers, including an increased emphasis on entry-level and at-risk workers.



Our Strategic Planning Process



Building on the three strategic priorities established by the Board of Trustees, the Education Fund's Executive Director launched a strategic planning process consisting of the following activities:

Program Participant Focus Groups	Discussions with current and past program participants to gather feedback about their experiences with the Education Fund and identify potential programmatic improvements
Steward Focus Groups	Conversations with union stewards to gain their perspective about increasing the awareness of the Education Fund, and exploring ways to better meet employee needs
Employer Roundtable	A meeting with participating employers to discuss their workforce development priorities and explore collective strategic opportunities
Partner Survey	A survey of key partners in Colorado, Nevada and Oregon, to collect their input regarding strategic priorities and other relevant issues
All Staff Retreat	A one-day retreat to assess the Education Fund's organizational readiness to implement the Trustees' goals, anticipate logistical barriers, and perform a series of gap analyses
Leadership Retreat	A two-day retreat to strategically map out the Trustees' priorities, analyze their impact on the Education Fund's stakeholders, and create implementation plans
Education and Training Roundtable	A conversation with key educational partners and healthcare workforce experts to examine ways of enhancing current training capacity designed to meet future workforce needs

Creating Value Through Planning

Our planning process was designed to capture the perspectives of all our stakeholders, and ensure their interests are met. Below are some of the specific ways our plan will serve each stakeholder group.

STAKEHOLDER	HOW THE PLAN CREATES VALUE
Our Trustees	<ul style="list-style-type: none">• Provides a path to implement the goals and values identified by the Trustees• Offers a template to evaluate the Education Fund's organizational effectiveness
Current and Future Education Fund Participants and Beneficiaries	<ul style="list-style-type: none">• Creates new and meaningful educational opportunities and career paths• Ensures that the programs offered are aligned with both workers' needs and the needs of the healthcare industry• Gives voice to the perspectives and concerns of beneficiaries• Promotes accountability for customer service and performance
Participating Employers and Unions	<ul style="list-style-type: none">• Articulates and clarifies the organizational priorities of the Education Fund• Enhances constructive partnership and joint action• Fosters responsive stewardship of resources
Education Fund Senior Leadership and Staff	<ul style="list-style-type: none">• Produces a framework for organizational expectations and success• Sets clear guidelines for programmatic priorities and actions• Includes the perspectives and concerns of staff• Recognizes and addresses implementation challenges• Helps create a cohesive working culture and shared organizational values

STRATEGIC PRIORITIES

1 Track Healthcare Workforce Trends



The Education Fund will increase its capacity to identify current and future workforce trends.

STAKEHOLDER OPPORTUNITIES

- Increase access to higher wage jobs
- Enhance employer workforce planning and development capacity
- Assist employees with relevant and sustainable career planning
- Improve stakeholders' ability to respond to trends and workforce needs

POTENTIAL RISKS AND CONFLICTS

- Uncertainty regarding healthcare reform
- Concerns from partners about sharing critical data

KEY ACTION STEPS

- Establish process for obtaining reliable workforce data forecasts from employers
- Identify healthcare workforce issues with national implications
- Dedicate staff and resources to developing a command of relevant issues
- Produce reports for national audiences

The Education Fund analyzes broad trends shaping the future of healthcare in order to ensure programs remain both relevant and forward-thinking. Some of these issues include:

- Fluctuations in the labor market
- Changing scopes of practice
- New models of care
- Shifting demographics
- Emerging professions
- Innovations in technology
- New policies and regulations

“The **Education Fund** is really good for **supporting** me. They have **helped** me a lot.”

After moving to the US from Guam in her early 20's, Tae attended a CNA program and got a job working with Kindred. She enjoys taking care of the residents there, but has always been interested in furthering her career. When she heard from her union rep about the Education Fund's services, she was eager to participate.

Since December 2009, Tae has taken advantage of just about every service that is available to her through the Education Fund. She attended a workshop on “How to Become an LVN”, Workplace English classes, and a Math Refresher, all of which were offered onsite at her facility. She then took on the challenge of community college Math classes through the College of Alameda, where she has earned a reputation with her instructors and tutor as an extremely dedicated straight A student.

Tae has her sights on advancing into a higher paying healthcare job that is less physically demanding than her current position. She meets regularly with her career counselor, Daisy Kinyauo, to discuss different career possibilities and training programs in her area. She is very grateful for the assistance she's gotten over the last two years, saying, “The Education Fund is really good for supporting me. They have helped me a lot.”

Tae Han, CNA
Kindred Bayview
Northern California



STRATEGIC PRIORITIES

2 Strengthen Stakeholder Partnership



The Education Fund will improve employee and employer engagement.

STAKEHOLDER OPPORTUNITIES

- Improved integration of the Education Fund's programs and staff with unions and employers at all levels
- Increased partnering opportunities for stakeholders
- Strengthened ability of employers to attract and retain a highly-trained workforce (i.e., to be an "employer of choice")
- Easier access to information and programs for eligible employees
- Greater professional and economic mobility for employees

POTENTIAL RISKS AND CONFLICTS

- Increased competition for access to popular training programs
- Conflicting needs of stakeholders

KEY ACTION STEPS

- Strengthen employee outreach methods
- Increase attendance at employer and union staff meetings and new hire orientations
- Cultivate and build relationships with employers at both corporate and facility levels
- Expand recruitment and develop Education Fund Champions
- Improve website and streamline application processes



As a labor-management partnership, we are in a unique position to bring together labor, employers, community colleges, and educators to develop the quality healthcare workforce we all need."



Jim Simpson

*President & Chair
Education Fund Board of Trustees*

“Getting a **higher wage** has helped me to catch up on my bills and **provide better** for myself and my children.”

I worked as File clerk at Kaiser Permanente Bellflower for 11 years. When I heard last year that my job was being eliminated, I wasn't happy, but I thought this might be the opportunity I'd been waiting for to go back to school.

I enrolled in a Medical Assistant program in the spring and finished school in December 2010. I took the national certification exam and passed, and started working in February 2011 at KP's Euclid Medical Offices in Orange County.

This program really helped me to grow both professionally and as a person. I have three kids and am taking care of an older parent, and have been through the healthcare system with ill family members. Now that I'm a Medical Assistant, I have a better understanding of how it all works.

I want to thank KP and the union for this benefit, because without this program a lot of people wouldn't be able to go back to school and better themselves. Getting a higher wage has helped me to catch up on my bills and provide better for myself and my children. The counselors that I had through the Education Fund helped me to get through this — they're like a second family for me. They showed me that they care about me, encouraged me and provided me with great motivation. Next, I want to go back for my LVN or RN degree. I love helping people and being a KP employee.



Letonia Watson,
Medical Assistant
*KP Euclid Medical Offices
Southern California*

STRATEGIC PRIORITIES

3 Provide Value for All Members



The Education Fund will identify and develop relevant programs to address the needs of eligible workers, including an increased emphasis on entry-level and at-risk workers.

STAKEHOLDER OPPORTUNITIES

- The Education Fund is better positioned to meet the needs of employers
- Greater job security for employees
- Build new relationships, partnerships, and funders
- Provide valuable education and training opportunities to previously underserved workers

POTENTIAL RISKS AND CONFLICTS

- Scarce community college resources
- Need to balance program priorities
- May challenge existing staff resources

KEY ACTION STEPS

- Develop Education Fund Training Plan – 2011-2014
- Identify new career pathways where appropriate
- Secure potential funders and partners
- Build education and training vendor capacity
- Improve program evaluation methods to assess effectiveness and foster improvement

“Employees already working in entry level jobs in the healthcare sector are a tremendous resource, and can have a positive impact on patient care. They are already familiar with the healthcare field, are eager to advance in their careers, and often bring strong cross-cultural skills that are in high demand.”



Hal Ruddick

*Secretary - Treasurer
Education Fund Board of Trustees*

“The **Ed Fund** gave me that little bit of **flexibility** with my schedule that allowed me enough **time to study**.”

I would like to start off by saying that I would not be an RN right now if it weren't for the Education Fund. I am a wife and mother of two young children, so I needed a full-time income in order to survive. The Ed Fund gave me that little bit of flexibility with my schedule that allowed me enough time to study. I must also commend the counselors, who were very supportive and always available when I needed them or had questions.

I heard about the Education Fund from a co-worker when I was working as an OB Tech at Good Samaritan. I was so excited to find out there was this kind of help available. I went through several struggles during my two years in school — my husband lost his job, we filed for bankruptcy, tried to keep our home and eventually had to short sale our house — all the while trying to maintain a happy home for our children. I'll tell you one thing, if you truly want something badly enough you can get through anything!

I feel very fortunate to have gotten a job as a new grad in the NICU at Good Samaritan Hospital in this economy. I worked extremely hard to get there. I kept my full-time status, always went to work on time and was a pleasant person to be around no matter how stressed I was. My co-workers and management team were very supportive. I have so much to be thankful for, including the Education Fund program and its staff. I am excited to start my new career and see a bright future for myself and my family.

Lindsay Flores, RN

*Good Samaritan Hospital
Northern California (HCA)*



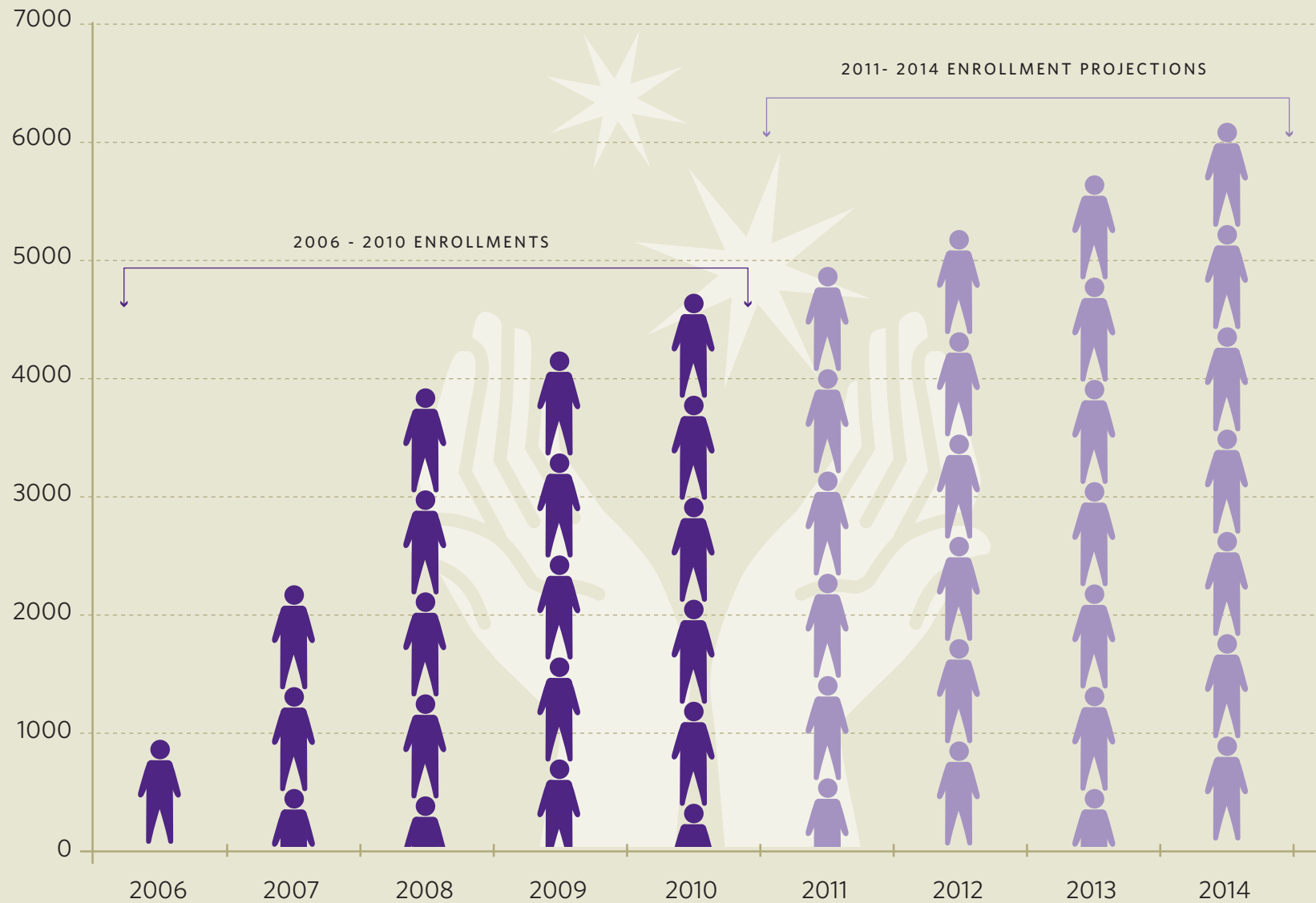
Implementation Plan



	2011	2012	2013	2014
1. Track Healthcare Workforce Trends	<ul style="list-style-type: none"> • SWOT analysis* • Engage all participating employers in coordinated workforce planning 	<ul style="list-style-type: none"> • Comprehensive literature review of healthcare workforce trends and projections • Establish regular planning meetings with employers' HR departments 	<ul style="list-style-type: none"> • Synthesize all research findings • In conjunction with employers, establish mutual workforce targets • Create primer for stakeholders about workforce issues related to health reform 	<ul style="list-style-type: none"> • Publish white paper(s) on a critical workforce issue • Present at national conference(s)
2. Strengthen Stakeholder Partnership	<ul style="list-style-type: none"> • Hold inaugural Employer Roundtable Meeting* • Develop more robust employee engagement strategy • Launch Ed Fund Champions project* • Launch new, more user-friendly website 	<ul style="list-style-type: none"> • Implement employee/champion engagement strategy in all regions, focusing on typically underserved classifications • Strengthen employer engagement efforts via roundtables and other regular contact • Pilot stakeholder impact evaluation project • Enhance use of new technologies to communicate with employees 	<ul style="list-style-type: none"> • Fully integrate employee engagement strategy with partners' internal communications methods • Target newly-identified critical areas • Develop and distribute 2012 performance report 	<ul style="list-style-type: none"> • Demonstrate strengthened partnerships through increased use of Education Fund services at all levels
3. Provide Value for All Members	<ul style="list-style-type: none"> • Survey employers on upgrade needs* • Launch Skill Builder pilots* • Expand Skill Builder classes in other regions • Plan for initial Upgrade training programs 	<ul style="list-style-type: none"> • Analyze Skill Builders pilot performance data and course correct as needed • Conduct needs assessment within entry-level classifications • Roll-out multiple longer-term Upgrade programs • Launch Program Performance Evaluation 	<ul style="list-style-type: none"> • Expand Skill Builder program to address new needs 	<ul style="list-style-type: none"> • Identify and roll-out training in response to newly-identified critical needs
Organization-wide Priorities	<ul style="list-style-type: none"> • Establish standing Evaluation Committee* • Assess existing education and training capacity and identify gaps* • Host Education and Training roundtable 	<ul style="list-style-type: none"> • Build new model of partnering with the community college system • Strengthen relations with funders and other potential partners • Launch revamped development strategy • Identify other critical organizational needs (e.g., staff development, communications, and marketing) 	<ul style="list-style-type: none"> • Launch plan for addressing other organizational needs • Expand program offerings by building on increased collaboration with vendors and securing additional funding 	<ul style="list-style-type: none"> • Evaluation Committee to document Strategic Plan 2011-2014 performance

* Completed

Looking Ahead to 2014



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The SEIU UHW-West and Joint Employer Education Fund wishes to thank those who were instrumental in creating this document. Their efforts helped to capture the voices of those who contributed such valuable insight and direction. Thank you.



SEIU UHW-WEST & JOINT EMPLOYER
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