



SEIU-UHW & Joint Employer Education Fund

**The Education Fund**  
*Empowering potential.*

**Annual Report**



# The Education Fund

*Empowering potential.*

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## About The Education Fund

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The Education Fund is a partnership between 22 healthcare industry employers and six SEIU local unions, funded by collectively bargained employer contributions to provide education and training benefits for more than 100,000 eligible healthcare workers.

## Our Mission

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To empower our diverse healthcare workforce to advance in a changing environment through innovative education and training solutions.

# A Message from the **Executive Director**

The Education Fund launched 19 years ago to empower a diverse healthcare workforce by providing opportunities to union members to learn new skills and advance in their careers through employer-funded training programs. We have continued to grow, year-over-year, and 2022 was our best year yet.

We are a partnership between 22 healthcare industry employers and six SEIU local unions, funded by collectively bargained employer contributions to provide education and training benefits for more than 100,000 eligible healthcare workers. Our organizational structure, based on a formal partnership with these major healthcare employers, allows us to connect learners to career advancement opportunities for in-demand, high quality jobs.

We work to empower our diverse healthcare workforce to advance in a changing environment through innovative education and training solutions. Whether members want to go to college, chart a course for their career, learn new skills or need CEUs, the Education Fund supports members in their advancement.

We were proud to help more passionate healthcare workers achieve their career dreams than ever before, and learners who moved into a new position after graduating from Education Fund programs saw an average wage increase of 48 percent.

In 2022, we saw unprecedented interest in our programs as more learners than ever sought to advance their careers, and we accelerated our efforts to meet the demand. In an era in which ripple effects of the COVID-19 pandemic left hospitals and care facilities short-staffed, our programs helped meet that demand for a robust and well-trained healthcare workforce. In 2023, we are anticipating even higher levels of interest in the Education Fund.

This report contains an overview of how our programs and partnerships were able to support learners this past year. On behalf of the entire board and staff of the Education Fund, we look forward to continuing to positively impact the lives of our members and their families and communities through our work.

In solidarity,



**Rebecca Hanson**

Executive Director

# By The Numbers

Demand for programs and services offered by the Education Fund continued to be extremely high in 2022, while the need for educating and upskilling our workforce is greater than ever. The healthcare industry is still in a workforce crisis triggered by the COVID-19 pandemic.



## 7 Million

Californians living in areas with health profession shortages, majority communities of color.



## 3.2 Million

New healthcare workers United States needs to overcome healthcare workforce crisis.



## 81%

of SEIU-UHW members surveyed by Mental Health America report exhaustion or burnout.



## 26%

of members reported considering early retirement, with 60% of Black, Indigenous, and People of Color reporting they have considered leaving healthcare as their profession.



In the midst of this landscape, the Education Fund saw record interest and record results among our participants:



## 21,000 Learners

In 2022, the Education Fund served more than 21,000 members (21% of total eligible membership), participating in more than 105,000 separate courses, trainings or programs.

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## 3,000 in Degree & Certificate Programs

The Education Fund supported approximately 3,000 healthcare workers in certificate and degree programs, which provide all of the training and coursework necessary to earn a credential for a new position.

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## 70% Black, Indigenous, People of Color

70% of our 2022 graduates are Black, Indigenous, People of Color. This is an increase from 2021 (63%) and 2020 (60%).

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## 362 New Jobs

In 2022, the Education Fund tracked a record high of 362 learners moving into new, higher level jobs, the most ever in a single year.

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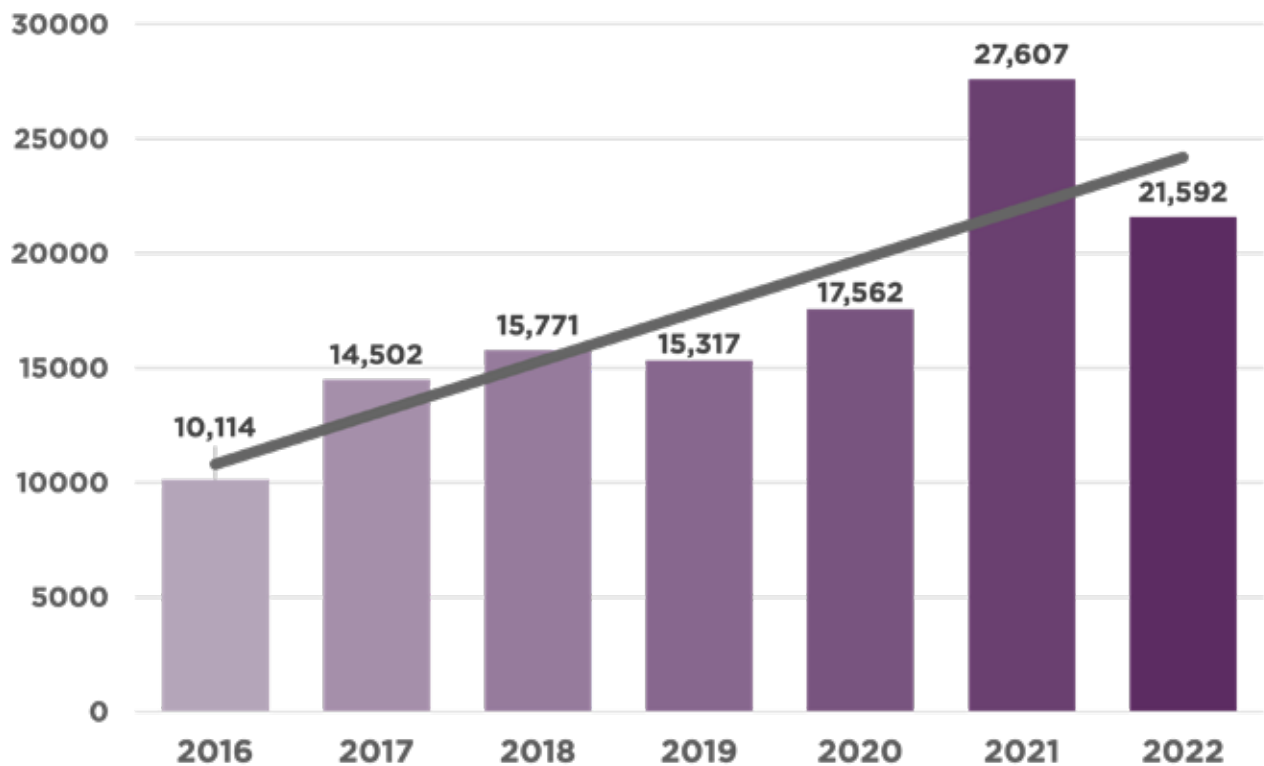
# Program Growth

The Education Fund provides support for a broad range of programs and services to thousands of our **more than 100,000 eligible healthcare workers** annually, ranging from short term/on-demand online classes to full degree programs.

In a span of seven years, from 2016 to 2022, the number of participant learners has **more than doubled from 10,000 to more than 21,000**.



## Education Fund Learners Served



## Programs and services include:



### Preparation

Classes covering computer skills, medical terminology, foundational math and science, online soft skills, and more.



### Continuing Education

Credits and reimbursement toward CEUs/CMEs, AHA certifications, licenses, and more.



### College Courses

General Education classes and prerequisites as well as support for certificate and degree programs that can accelerate careers in healthcare.



### Career Advice

Personalized, one-on-one career advice with one of our professional career counselors. More than 11,100 members served in 2022.



### Tuition Support

Reimbursement for tuition, textbooks, and fees for degree or certificate programs.



### Career Training and Apprenticeships

Upon successful completion, workers are prepared to advance to key positions in allied health.



### Wage Replacement

Financial support to make it possible to reduce work hours to study, go to school, attend clinicals, etc. (select employers only).



### Job-to-Job

Supports learners through Layoff/Reduction in Force (RIF).





# Preparing **Tomorrow's Workforce**

The Education Fund provides members with the training they need to earn a degree or certification that may qualify them for a new, higher-level, in-demand job.

In 2022, the Education Fund supported approximately 3,000 workers in programs aimed at earning these credentials that can lead to new positions. Upskilling the existing workforce is key to helping to solve the current healthcare staffing shortage.

In 2022, the Education Fund led eight different joint labor-management registered apprenticeships leading to fully trained positions in:

- Acute Care
- Imaging
- Medical Assistant
- Medical Coder
- Pharmacy Tech
- Sterile Processing
- Vision Services Assistant

## 2022 Degree/Certification Training Program Participants

Licensed Vocational Nurse (LVN/LPN)	<b>633</b>	Sterile Processing / Central Supply Tech	<b>129</b>
Registered Nurse (RN)	<b>502</b>	Respiratory (RCP, RT, PFT)	<b>128</b>
Phlebotomy/Laboratory (Lab Tech, MLT, CLS, Cyto, etc.)	<b>365</b>	Medical Coding/HIM	<b>121</b>
Surgical Technology	<b>205</b>	Business/Healthcare Administration & Management	<b>97</b>
Imaging (Rad Tech, IR, MRI, CT, Sono, Nuc Med)	<b>195</b>	Computer Science/Information Science	<b>68</b>
Medical Assistant (MA)	<b>177</b>	Other Patient Care	<b>35</b>
Mental Health & Social Services (Psych Tech, MSW/LCSW, MFT, etc.)	<b>164</b>	Nursing Assistant (CNA, NA, PCT)	<b>31</b>
		Pharmacy (Clerk, Tech, Pharmacist)	<b>19</b>



# Reduced Turnover, Increased Pay

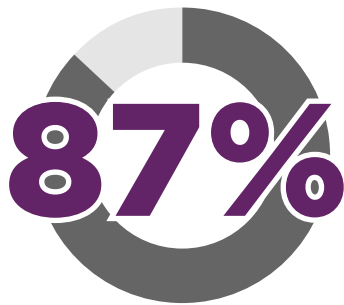
In addition to shoring up the healthcare workforce broadly, the Education Fund works to support individual learners by helping them achieve higher wages. On average, 87% of participants who start many of our biggest programs complete these programs. This hard work and dedication often translates to new opportunities, with **30% of graduates achieving a new, higher-paying job.**

Higher pay is significant: **these raises average a 48% increase** – the sort of financial impact that is life-changing not only for an individual, but for their entire household and family.

For the employer, workers who participate in education programs are more likely to remain working for that same employer. **Over the past three years, turnover rates have been cut in half among Education Fund participants.**

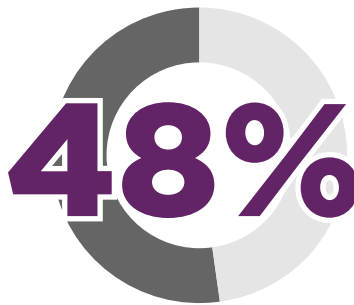


## KEY OUTCOMES



### GRADUATION RATE

Completion in Tuition Support, Wage Replacement, Career Pathways, or Apprenticeship Training programs.



### WAGE INCREASES

Average wage increase for members successfully completing programs and moving into new job, based on available data.



### EMPLOYEE RETENTION

Employee turnover rate for Education Fund v. Non-Education Fund learners over time (Education Fund learners within prior three years).

# Continued Growth with **New Employer Partners**

The Education Fund continued to grow in 2022. As the year began, we welcomed new employer partners across our regions: in the Northwest, Legacy Health in the Portland and Vancouver metro area and mid-Willamette Valley; Columbia Memorial Hospital in Portland; Planned Parenthood of the Rocky Mountains in Colorado, Nevada, and our first-ever members in New Mexico. These additions represent more than 1,600 new eligible members to the Education Fund family.

**We are thrilled to be working with these new partners and serving these members. Welcome!**



## MEMBER HIGHLIGHT

# Nancy Espino

Planned Parenthood Columbia Willamette

Nancy Espino always wanted to work in the medical field. But as a new mother at 18, she had to put her parenting first and college on hold. Now, a few years later, she's fulfilling her dream. She found a path forward by getting a job as a clinical assistant with Planned Parenthood Columbia Willamette (East Portland, Oregon).

When she heard about the Education Fund, she says "I couldn't believe that something like that even existed. I thought it was too good to be true."

Nancy intends to pursue a Medical Assistant degree or certification, and is working on her prerequisites now, by using College Courses to pay for them – all through the Education Fund.

"The Education Fund has impacted my life. It's helping me down the road in the future with my career path and choices. Overall, my whole experience with the Education Fund has been super positive."

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# Member Portal **Launch**

In our efforts to continually improve the member experience and our internal systems and infrastructure, in 2022 the Education Fund launched *MyEdFund*, the new and secure web portal for all eligible learners.

*MyEdFund* is the place for members to register for all Education Fund programs and services, including making career counseling appointments. *MyEdFund* also allows members to:

- View available programs and services
- Easily contact their career counselors
- See current and upcoming enrollments
- Update contact info, profile and preferences

Our members are now enjoying the new experience and the ability to have all of their Education Fund information in one place. At the same time, *MyEdFund's* integration with our Salesforce member database gives the Education Fund a robust infrastructure for data storage, program implementation and enrollment, and communication in order to provide better service overall.





## MEMBER HIGHLIGHT

# Lisa Agbagwu

Kaiser Permanente

Lisa Agbagwu was an on-call CNA at Kaiser Permanente West Los Angeles Medical Center. With the help of the Education Fund's Tuition Support program, she finished her LVN program in March 2022 and subsequently got hired at Kaiser as an LVN.

"Becoming an LVN – it makes me want to go further, because the more education you get the higher you go. Being an LVN now and being able to actually concentrate on my patient and providing care to my patient directly is so much more rewarding."

Her wage went from an hourly wage of \$23 to \$34, a 48% increase! And to top it off, she went from being on-call to full-time benefited.

"It meant a lot to get to where I want to, career-wise, without any student debt. I really was at the verge of giving up at some point because it just seemed impossible. I was so grateful to the Education Fund."

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# Member2Member Program

The Education Fund's Member2Member program continued to be a vital part of our organization's outreach. Education Fund Member2Member representatives (M2Ms) play a critical leadership role connecting members to Education Fund programs and services.

M2Ms develop and maintain partnerships with union and management leaders to coordinate outreach efforts and address workforce development needs within their facility.

In 2022, our 56 active M2Ms were busier than ever. During the year they:

- Completed a total of **814 shifts**
- Completed **1,038 department visits**
- Completed **525 Stewards Council meetings**

In addition, a select group participated in Leadership Development Training covering communication, conflict resolution, presentation skills and tech skills. M2Ms also began quarterly meetings in-person for the first time since COVID-19 began.

**We are extremely grateful for the work our M2Ms do on behalf of the Education Fund!**



## MEMBER HIGHLIGHT

# Samantha Frye

Dignity Health

Growing up, Samantha Frye spent much of her time at Dignity Health Mercy Medical Center (Merced, CA). Her mom was ill, and the incredible care these nurses demonstrated inspired Samantha to become a nurse. "I wanted to give back to the community for all they did for my mom."

As a single parent, Samantha didn't know how she would be able to work, take classes and take care of her daughter all at the same time, but her best friend told her about the Education Fund and explained that they have programs to help pay for tuition, books and supplies plus career counseling.

When asked about her experience using the Education Fund, Samantha says, "The experience was amazing! It was efficient, user-friendly and not at all complicated. If you don't know where to start, just meet with a Career Counselor and they will guide you along the way."

Samantha recently graduated as a Registered Nurse and hopes to soon work at Mercy Medical Center, just like the nurses who took special care of her mom. "I just want to cry when I think about it," Samantha says.

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## Shirley Ware **Education Center**

The Shirley Ware Education Center (SWEC) has been providing education and training to community members and healthcare workers since its formation in 1998. SWEC raises grants from public and private foundation sources to further this purpose. Both SWEC and the Education Fund share identical boards, jointly governed by labor and employer representatives.

Named to honor the pioneering Oakland labor leader Shirley Ware, SWEC has continued to expand in recent years, as the need for a larger healthcare workforce has become more urgent in the wake of the global pandemic. What had been a looming, future staffing crisis accelerated to the present as burnout, stress, and challenging conditions led to many workers leaving healthcare altogether.

SWEC and the Education Fund work to address this shortage through education programs, and SWEC is uniquely positioned to provide additional supportive services to lower wage healthcare workers as part of its grant-funded work.

In 2022, SWEC grants included funding from:

- California's Employment Training Panel – High Skill Training
- The H-CAP Department of Labor Closing the Skills Gap Apprenticeship Grant
- HRTTP 3.0 WIOA – Capacity-Building for Career Pathways
- HRTTP Resilient Workforce General Fund (RWF) Program – Expanded Partnerships to Promote Healthcare Career Pathways



# Financials

## Program Cost and Value

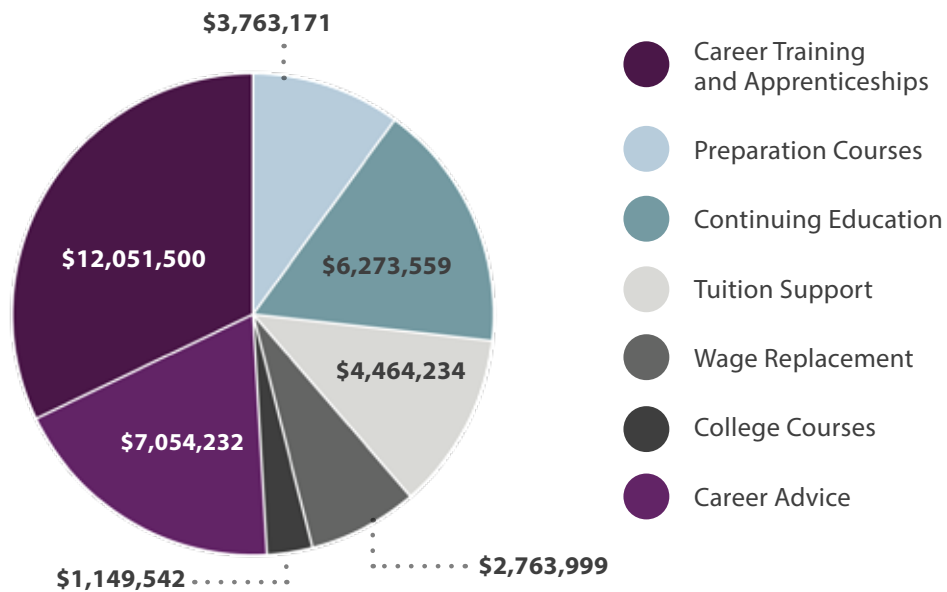
The Education Fund's programs support our members in a variety of ways. Whether providing an actual education program directly to a learner, or providing reimbursement for an education expense, much of this support is aimed at easing the financial burden of education on our members. Education costs can be significant, but with the support of the Education Fund, many educational opportunities become easier to attain.

The Education Fund offers continuing education reimbursement up to \$1,500 and tuition support of up to \$5,250, in addition to working with schools and education providers to support full degree and certificate programs and apprenticeships. (Support from the Education Fund is in high-demand, and programs are offered as available.)

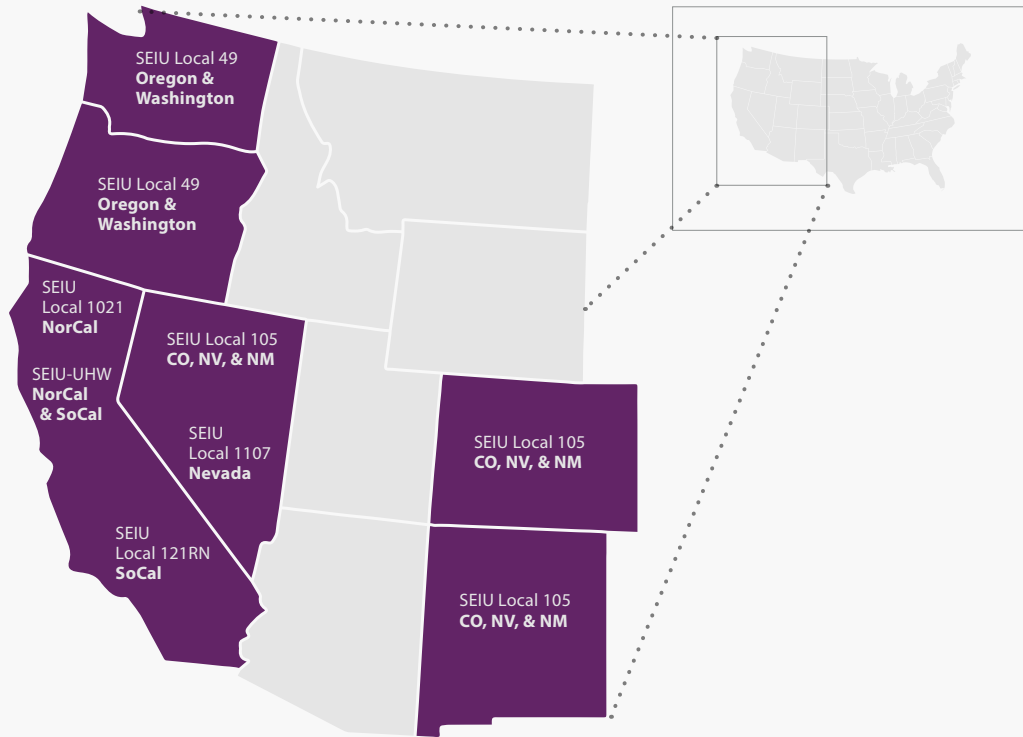
## Program Funding

The Education Fund is an independent Taft-Hartley Trust Fund under the IRS tax code, funded by employer contributions agreed upon within collectively bargained union contracts with these employers. **The Education Fund does not receive union dues money.** The Education Fund also receives grant funding through our affiliate organization, the Shirley Ware Education Center, a 501(c)(3) nonprofit.

## 2022 Program Expenditures



# Current Participating Local Unions and Employers



## Participating Local Unions

SEIU-United Healthcare Workers West  
SEIU Local 49 Oregon/Washington

SEIU Local 121RN Southern California  
SEIU Local 1107 Nevada

SEIU Local 105 Colorado  
SEIU Local 1021

## Participating Employers

Alameda Health System  
AlliedUP  
Antelope Valley Medical Center  
Cedars-Sinai Marina del Rey Hospital  
Chinese Hospital  
Columbia Memorial Hospital  
Dignity Health – Northern California  
El Camino Hospital  
HCA  
*Good Samaritan Hospital and  
Regional Medical Center of San Jose*  
Hollywood Presbyterian Medical Center

Kaiser Permanente  
KPC Health  
*South Coast, Anaheim, Chapman,  
Hemet, Menifee and Victor Valley Global  
Medical Centers*  
Legacy Health System  
Pacifica Hospital of the Valley  
Planned Parenthood  
Columbia Willamette  
Planned Parenthood  
of the Rocky Mountains  
Planned Parenthood  
Southwestern Oregon

Prime Healthcare  
*Centinel Hospital, Encino Hospital,  
Garden Grove Hospital and St. Francis  
Medical Centers*  
Santa Rosa Community Health Center  
Southern California Hospital  
at Culver City and Southern California  
Hospital at Hollywood  
Tri-City Medical Center  
Watsonville Community Hospital

# Leadership

## Education Fund Board of Trustees

### **Daniel N. Shaw**

President & Chair  
Management Trustee  
VP, National Finance Planning  
& Performance  
Kaiser Permanente

### **Donald A. Bradburn**

Management Trustee  
Director, Workforce Planning  
and Development  
Kaiser Permanente Southern California

### **Wylie Adams**

Management Trustee  
System Director, Labor Relations  
Business Partner  
Employee & Labor Relations  
Human Resources  
Dignity Health

### **Lourdes Maria R. Casao, PhD, RN, FNP, NPD-BC**

Management Trustee  
Director, Education Department  
CHA Hollywood Presbyterian  
Medical Center

### **Ra Criscitiello**

Secretary-Treasurer Labor Trustee  
Strategic and Legal Research,  
Deputy Director of Research  
SEIU-UHW West

### **Sonya Allen-Smith**

Labor Trustee  
Contract Specialist  
SEIU-UHW West

### **Dennis Anderson**

Labor Trustee  
Clinical Lab Assistant  
SEIU-UHW West

### **Meg Niemi**

Labor Trustee  
President  
SEIU Local 49

### **Terrie Ridgeway-Olmos**

Labor Trustee  
Coordinator - Healthcare  
Opportunities Dept.  
SEIU-UHW West

### **Ryn Schneider**

Labor Trustee  
Hospital Division Regional Director  
SEIU-UHW West

## Leadership Team

### **Rebecca Hanson**

Executive Director

### **Phoenix Lockett**

Senior Director of Programs

### **Thomas Echaniz**

Chief of Finance and Administration

### **Edgar Romero**

Director, Human Resources

### **Tarik Scott**

Director of Development

### **Greg Maron**

Director of Employer  
and Labor Relations

### **Jocelyn Cutay**

Controller

### **Maggie Newcomb Raine**

Director of Organizational Learning

### **Lai-San Seto**

Assistant Director of Quality  
and Compliance

### **Deanna Hatter**

Assistant Director of Career Advice

### **Mabel Meza**

Assistant Director of Education

### **Keith Mitchell**

Director of Communications,  
Marketing and Branding



# The Education Fund

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[theedfund.org](http://theedfund.org)