

The Education Fund

Empowering potential.





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About The Education Fund

The Education Fund is a partnership between 21 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

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

A Message from the Executive Director

Friends,

In 2023, the Education Fund experienced another record-setting year in which we served more than 22,000 members. More than 2,600 members participated in degree and certificate programs, with 800 new graduates. Six hundred moved into new jobs with an average 43% wage increase of \$14 per hour.

These outcomes are a reason to celebrate – the achievements of our learners are truly our greatest measure of success. Our learners' drive, resilience, and positive attitude throughout their work in healthcare and as students is a constant inspiration for our entire staff, our board and our partners. Our learners fuel our drive to continually do our best work and serve our membership at the highest level.

Last year also marked a significant milestone for the Education Fund. Our affiliate organization, the Shirley Ware Education Center (SWEC), celebrated its 25th anniversary. SWEC paved the way for the creation of the Education Fund, and in 2024 we are celebrating the 20th anniversary of the Education Fund itself. As we look back on our past, we are also keeping an eye toward a strong future, as growth and new opportunities continue to move our work and the organization forward.

Our partner-unions and partner-employers completed collective bargaining for 80,000 vital healthcare workers, representing approximately 80% of our eligible members. These employers and unions trust us with the great responsibility of supporting their workforce development. That trust was further underscored throughout the year with contract negotiations resulting in strong continued financial support for our work, including an increased commitment from our largest partner-employer, Kaiser Permanente.

I am so proud of what we were able to accomplish together and am grateful for the opportunity to continue leading this organization. I invite you to learn more about many of these accomplishments, including some of our members' individual stories, program participation, key outcomes and much more in the following pages of this report. Thank you for your continued interest and support.

In solidarity,

Rebecca Hanson

Executive Director



Rebecca Hanson

Executive Director

From Participant, to Graduate, to a New Career

Our learners go on a challenging and rewarding journey as they pursue their career growth. And we're with them every step of the way — from an initial career advice session with one of our career counselors, through their education program, to graduation and even a new position.

22,107

The Education Fund continued to grow, serving 22,107 of our members in 2023. This represents more than one out of every five eligible members taking advantage of our programs and services.

594

The record number of Education Fund learners who moved into new, higher-level jobs in 2023.

43%

The average wage increase of those learners in their new roles.

2,627

The number of learners who received support from the Education Fund to participate in high-impact degree or certificate training programs.

829

The number of learners who completed a new degree or certificate training program with our support.

68% 76%

We serve a diverse group that reflects healthcare workers in our region. 68% of our participants are Black, Indigenous, People of Color. 76% are women.

10,000+

More than 10,000 learners (10,322) participated in a Continuing Education class or received reimbursement assistance for licenses or certifications. And more than 10,000 learners (10,290) had one-on-one career counseling with one of our career advice experts.

Programs and Services

CAREER ADVICE

Education Fund career counselors work one-on-one with learners to help determine goals, create personalized career development plans, and provide guidance on Education Fund programs and services.

EDUCATION

Preparation and Critical Skills

Short-term courses covering a variety of topics relevant to today's workforce needs, including: computer classes, medical terminology, foundational math and science, online soft skills courses, language programs and more.

College Courses

Local community college options for General Education and pre-requisites courses.

Tuition Support

Reimbursement of up to \$5,250 for qualified tuition, textbooks and fees for degree and certificate programs.

Career Pathways and Apprenticeships

Prepares workers to qualify for key positions in allied health.

Wage Replacement

Up to \$10,000 for learners at select employers to supplement the loss of income due to a reduction in hours to study, go to school, or attend clinicals.

CONTINUING EDUCATION

Online courses and reimbursement up to \$1,500 annually toward the costs of CEUs/CMEs, AHA certifications, licenses and more.

JOB-TO-JOB

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



LEARNER ACHIEVEMENT: **Maria Martinez Castrejon**

Maria Martinez Castrejon is a first-generation college graduate who utilized the Education Fund's programs to get her dream job as a Family Nurse Practitioner. While working as an on-call Medical Assistant at Kaiser Permanente Richmond during the pandemic, Maria started a full-time Masters Entry Program in Nursing (MEPN) at UCSF's School of Nursing. "I am very thankful for the Tuition Support program and Continuing Education Reimbursement program because this financial assistance helped relieve some of the financial stress so I did not have to take out an additional loan. It allowed me to spend more time on my academics and learning the skills to become a Family Nurse Practitioner."

Maria believes the skills she learned in her master's program, as well as her Spanish-speaking skills will allow her to help her community by advocating for her patients. "Having shared experiences like growing up in a low-income community will allow me to understand some of the challenges patients face." When asked how she'd describe the Ed Fund, she says, "the Education Fund is a great resource for all coworkers who would like to enhance their career development."



As a Family Nurse Practitioner at Petaluma Health Center, Maria has accomplished her educational goals while giving back to the community she loves.

The Education Fund is a great resource for all coworkers who would like to enhance their career development.



Historic Gains for Healthcare Workers

In 2023, healthcare workers achieved historic gains in opportunities, wages and benefits. In California, the governor signed a law to phase in the first-ever \$25 minimum wage for healthcare workers. Once in place, this should have life-changing impact on families across the state, leading to wage increases for more than 400,000 workers.

For the Education Fund specifically, more than 80% of our eligible members' local unions and employers engaged in contract negotiations during the year. The resulting agreements have secured and improved wages, benefit protections, bonuses and job security.

We are particularly excited about labor and management's commitment to workforce development by agreeing to continued or increased employer-funded education benefits. This funding allows us to provide the highest level of programs and services to union members who want to advance in their careers, build new skills or continue to succeed in their chosen field. In 2023, we were also pleased to welcome SEIU-UHW-represented workers at KPC Meniffee Global Medical Center and Hemet Global Medical Center and SEIU Local 49-represented workers at PeaceHealth in Oregon to the Education Fund's eligible membership. SEIU partnered with the Oregon Hospital Association to Pass HB3396, which includes funding that will result in \$10 million for Oregon pathway and apprentice learners from 2025 to 2027.

We look forward to continuing this work and to the continued success of our members and our partners.

Shirley Ware Education Center Turns 25

For more than a quarter of a century, the Shirley Ware Education Center (SWEC) has positively impacted lives and communities through the power of education. Named after Shirley Ware, a powerhouse union leader, SWEC is a testament to her unwavering dedication to education and labor rights.

In recognition of this milestone, in 2023, the Education Fund unveiled a commemorative video honoring Shirley Ware and marking the 25th anniversary of the Shirley Ware Education Center. This video, available at theedfund.org, not only pays tribute to her legacy but also narrates the pivotal role SWEC played in laying the groundwork for the formation of the SEIU-UHW & Joint Employer Education Fund.



Today, SWEC remains an essential nonprofit entity, working hand-in-hand with the Education Fund to carry out workforce development through raising grant funding from private foundations, state governments and other sources. 2023 also marked a record high for grant revenue, with \$7 million raised by SWEC. We look forward to many more years of helping individuals pursue their education and achieve their career goals with the support of SWEC.

Shirley Ware was a great leader. She was a visionary, she was a trailblazer. She was a mentor. She lifted as she climbed.

- Rep. Barbara Lee, Congresswoman, CA 12th District

New High Road Training Partnerships with County Workers

In 2023, SWEC and the Education Fund supported programs and services for hundreds of city and county employees represented by SEIU Local 521 and SEIU Local 1021 in California.

These programs are grant-funded by the State of California through the High Road Training Partnerships Resilient Workforce General Fund (RWF) Program. Funding is targeted to address workforce shortages in public health, human services and community health, and to build new labor-management partnership in workforce training for union employment in the public sector. This ongoing work is an expansion of the Education Fund's collaboration with public employee local unions.

To date, 958 members have been served, including 250 in social work and behavioral health programs and 184 in nursing. A focus of this partnership has been to expand our range of programming and supportive services to increase equity, access and career mobility for traditionally underserved populations. The majority of our learners are of Latino and Asian backgrounds, and we continue to elevate these workers' voices in the development of new programming.



LEARNER ACHIEVEMENT: Janelle Y. Diaz



Janelle Y. Diaz, a Certified Nursing Assistant working for Kern County, received support from the Education Fund and the Shirley Ware Education Center's partnership with SEIU Local 521 to work toward her Phlebotomy credential. The experience has been transformative. In her own words:

"I absolutely love the opportunity that the Education Fund has brought us. I came from a place of feeling stuck and not being able to advance in my workplace. The Ed Fund has brought joy back into my life!"

"I love all the amazing job opportunities that this has brought to me...The Ed Fund has been a true blessing! It has helped a lot of struggling employees. It has opened doors."

I know that without the Ed Fund, I would not have been able to go back to school. I hope this program continues to provide such a great resource to many. Thank you!!

LEARNER ACHIEVEMENT: **Veronica de Los Angeles**

Veronica De Los Angeles has been with Dignity Health California Hospital for 21 years. She has worked as a coder since 2006, and in 2023 completed her Associates in Registered Health Information Technology. With her new degree, even more doors are open to her. Being the only member of her family without a degree inspired her to go back to school. After raising her kids, it was her turn to do something for herself.

She admits that motivating people to change their profession isn't easy, but "with the great benefit of Ed Fund support, you know you won't be left out and you have these great resources to help you out."



Veronica's advice to other members planning to go back to school is to "be organized with your classes and your life. It's hard work but it pays off. You put your work in but you get paid in a better life, more money, better future for your family, etc. I like to share my story to motivate people so they can see that it can be done. I have three kids and still did it."

With the great benefit of Ed Fund support, you know you won't be left out and you have these great resources to help you out.

Member2Member Year in Review

The Education Fund's Member2Member (M2M) program has continued to grow and bring in new Member2Members from a wide variety of facilities. M2Ms develop and maintain partnerships with union and management leaders to coordinate outreach efforts and address workforce development needs within their facility.

M2Ms are trained by our Business Development Specialists to increase our organization's outreach. In December 2023, a new training focus was launched at the first ever in-person M2M retreat in Burbank, CA. Through four core competencies, M2Ms are now learning how to lead department huddles, help members sign up for the Education Fund's learner portal, speak at a steward council meeting, and staff an informational table at their facility – all with the goal of increasing member engagement and participation in Education Fund programs and services.

We recognize the hard work, dedication and leadership our Member2Members have shown throughout the year. In 2023 we had an all-time record of 77 M2Ms who completed more than 1,300 shifts on behalf of the Education Fund, and conducted more than 900 department visits at facilities throughout the region.





LEARNER ACHIEVEMENT: **Samantha Kebede**

Samantha Kebede, a Surgical Technologist at Legacy Health Systems, decided to go into the healthcare field “to make a difference in people’s lives while doing something I enjoy.” Her goal was to find a job that would give her a work-life balance and give her family a “better life.” After deciding she wanted to become a Surgical Technologist, she took advantage of as many Education Fund programs as she could.

“I was able to enroll in the Career Pathway Program to achieve my Certified Surgical Technologist certification without the burden of student debt, while also taking part in the Wage Replacement program. This allowed me to cut down on hours to be able to make time for studying, going to class, and clinicals without the burden of losing my normal wages. I also applied for and was given a free laptop after mine broke, which was sent straight to my home.” Samantha’s Ed Fund career counselor also motivated her throughout her education journey. “My career counselor helped keep me on track and genuinely cared about my success in the program. She was always quick to respond when I had questions or needed something. I appreciate all of the help she gave me toward achieving my goal.”

Samantha loves her job as a Surgical Technologist and is proud of the work-life balance she has created. She also makes a point of sharing her experience using the Ed Fund with her colleagues at Legacy Health. “Now that I have achieved my goal and have gone through the process of using the Ed Fund, I encourage all of my colleagues to use the Ed Fund. If I can do it, so can they.”

My career counselor helped keep me on track and genuinely cared about my success in the program. She was always quick to respond when I had questions or needed something.

Financials

Program Cost and Value

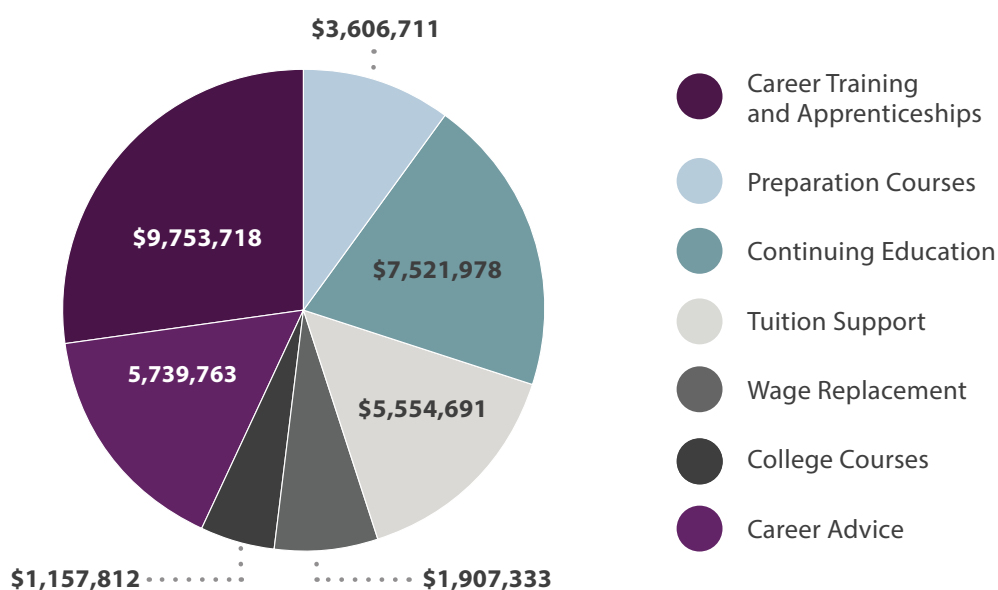
The Education Fund's programs support our members in a variety of ways. Whether providing an actual education program directly to a learner, or providing reimbursement for an education expense, much of this support is aimed at easing the financial burden of education on our members. Education costs can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

2023 Program Expenditures



Participating Local Unions

SEIU-United Healthcare Workers West
SEIU Local 49 Oregon/Washington
SEIU Local 105 Colorado
SEIU Local 1021
SEIU Local 121RN Southern California
SEIU Local 1107 Nevada

Grant-supported Local Unions

SEIU Local 521
SEIU Local 1021

Shirley Ware Education Center Funders

California Employment Training Panel
Healthcare Career Advancement Program (H-CAP)
Department of Labor – Closing the Skills Gap
California High Road Training Partnerships (H RTP) of
the California Workforce Development Board
James Irvine Foundation
Tipping Point Community

Participating Employers

Alameda Health System
AlliedUP
Antelope Valley Medical Center
CHA Hollywood Presbyterian Medical Center
Chinese Hospital
Columbia Memorial Hospital
Dignity Health
El Camino Hospital
HCA:
Good Samaritan Hospital, Regional Medical Center of San Jose, Los
Robles Regional Medical Center, and Riverside Community Hospital
Kaiser Permanente
KPC Health:
South Coast, Anaheim, Chapman, Hemet, Menifee, and Victor Valley
Global Medical Centers
Legacy Health System
PeaceHealth
Planned Parenthood Columbia Willamette
Planned Parenthood of the Rocky Mountains
Planned Parenthood Southwestern Oregon
Prime Healthcare:
Centinela 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
Watsonville Community Hospital
West Oakland Health Center

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