



# Skill-Building Initiative

Program Proposal for  
Home Care Associates



# Table of Contents

- Home Care Associates’ New Skill-Building Initiative* .....3
  
- Introducing the Problem* .....4
  
- The Problem* ..... 6
  - An Opportunity*.....8
  
- Data Collection and Analysis* .....10
  
- A Solution* .....11
  - The Center for Health Services Education and Training* .....11
  - CHSET Organizational Mission* ..... 11
  - CHSET Goals* ..... 12
  - Supportive Services* ..... 13
  - Accreditation* .....14
  - Launching CHSET* ..... 15
  - Hiring a Project Management Professional* .....15
  - Sample Job Description* .....16
  
- List of Required Documents for CHSET* .....19
  - Statement of Work & Project Scope* ..... 20
  - Project Plan Organizational Chart* ..... 26
  - Work Plan* ..... 27
  - Participant Flow* .....39
  - Funding Opportunities* .....40
  - Implementation Schedule* .....45
  - Projected Budget Template* .....49

## Home Care Associates' New Skill-Building Initiative

Each day, another 10,000 Baby Boomers turn 65. While this generation stays active and healthier well into advanced age, the sheer number of Baby Boomers and medical advancements have created a caregiving crisis in the United States. Too few trained individuals exist for the number of people requiring their services. The reasons for the demand and supply mismatch are numerous. Wages are too low. Federal and cost-sharing programs are limited to non-existent.

Opportunities for professional development and specialized training that led to a career path are rare. Increases in hospitalization for loved ones receiving informal care are rapidly occurring. It is a fragmented system across the country. Perhaps, the biggest reason is the lack of trained caregivers and their affiliated paraprofessionals. Informal caregivers (either through volunteer or paid employment) must receive high-quality training and upskilling opportunities that create better employment opportunities within the field of Health Services (Home Care or other Allied Health).

Home Care Associates (HCA), a Philadelphia-based, worker-owned home care cooperative in Southeastern Pennsylvania, recognizes the lack of specialty training, workforce development, and community-based health education within the Home Care and Allied Health Industries. As a solution, HCA proposes creating "The Center for Health Services Education and Training." This innovative community-based skill-building initiative will help participants learn, embrace, and navigate a self-directed trajectory through various types and levels of care provisions with social and emotional support. The program will build confidence for delivering care that meets industry standards. Ultimately, the programmatic impact will reduce emergency visits and increase community living efforts for the disabled and senior populations.

In 2021, HCA hired Dynamic Solutions for the Aging, LLC to develop an implementation roadmap for an educational and training program. This technical guide provides the data for why such a program is in demand; what infrastructure design, format, and scheduling are required (both programmatic and construction); and how to get the process started using a project management lens.

## Introducing the Problem

Voluminous amounts of aging and health data demonstrate an unprecedented population increase among the disabled and elderly in Philadelphia. The challenge and responsibility of caring for the aging population affects everyone. In a 2018 AARP Survey, almost 80% of people over 50 indicated they wanted to stay in their communities. Individuals wish to grow, thrive, and remain linked to their support systems and community connections. Unfortunately, studies reveal that 93% of care providers lack training for complex home care and clinical tasks, correlating with an increased hospitalization risk for older adults. This outcome is also associated with the lack of proper onboarding and specialized care training.

Based on the needs and desires of vulnerable populations, the demand for caregiving and home care services have dramatically increased. Numerous reports show that adequately trained caregivers enable someone to remain in their home and community for longer periods of time. For this reason, caregiver training and workforce development are essential and at the core of delivering home-based care successfully. With trained, well-qualified care providers, an individual's life expectancy increases while overall health care costs decrease. Home Health Aides, Direct-Care Workers, and Informal Caregivers all engage in caring for loved ones and consumers, serving as the backbone of home care services rendered in our communities.

Multiple employment studies show Home Health Aide is the fastest-growing job of all industries, despite its 65% turnover. Aides support millions of aging adults and disabled persons daily in the U.S. Approximately 4.6 million personal care aides, home health aides, and nursing assistants provide services. These professionals, though, are dwarfed by the approximately 53 million family caregivers provide informal care. In Pennsylvania specifically, the data show nearly 197,570 home health aides and personal care aides (with roughly a 10.3 % attrition rate) and 226,812 family caregivers providing care. This information represents a 19% increase in informal caregiving. For Home Health Aides, there is an anticipated employment growth of 33% in 2028. Additionally, self-direct care enrollment is up 40%, attracting more informal caregivers to the service.

For multiple reasons, trained care providers (Home Health Aides, Personal Care Attendants, Direct Care Worker & Informal Caregivers) are in demand more than ever. Here are a few critical considerations for why properly trained caregivers are a solution to community-based home care:

- Industry growth
- Poor attrition rate
- Increased hospitalization risk
- Provider shortages
- Higher utilization of home and community-based services
- Elevated levels of severe diagnosis
- Cost savings

As Covid-19 has confirmed, it is a critical time for individuals requiring care services and their need for specialized assistance. With the rise in the complexity and seriousness of illnesses, highly trained care providers are essential. But how does an individual receive first-rate training?

In Philadelphia, there is a demonstrated lack of high-quality training programs. This document provides the building blocks for establishing a Center for Health Services Education and Training. HCA has a prime opportunity to significantly impact these challenges by offering enrolled participants multi-layering training and resources.

To better understand potential cost savings, listed below are long-term care pricing for Philadelphia, PA (ACL, 2020):

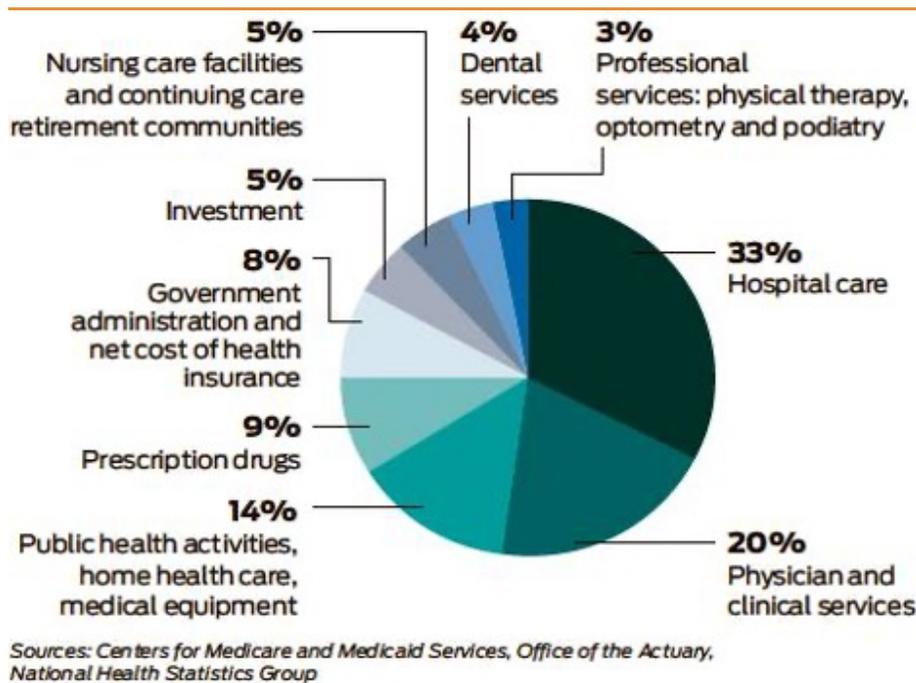
- \$376/day or \$11,285 per month for a semi-private room in a nursing home
- \$417/day or \$12,498 per month for a private room in a nursing home
- \$185/day or \$5,550 per month for care in an assisted living facility (for a one-bedroom unit)
- \$61.40/day for services in Adult Day Health Care
- \$19.90 an hour for a health aide

## The Problem

America is experiencing a dramatic shift in demographics. In 2019, people 65 years and older outnumbered those younger than five. As people age, an increasing number will live with multiple chronic conditions, such as diabetes or dementia. Functional impairments make Instrumental Activities of Daily Living (IADLs) and Activity of Daily Living (ADLs) difficult for living independently. These conditions also compromise an individual's ability to age in place. Ensuring that aging and disabled individuals can remain in their communities as independently as possible is a significant obstacle. Solutions will need to meet their expectations, preferences, and care obligations.

Additionally, the growth in Medicare and Medicaid costs and increasing healthcare costs have the citizenry questioning the financial solvency of the federal and state government programs. The Centers for Medicare & Medicaid Services (CMS) is the single largest payer for health care services. According to CMS, in 2019, the United States spent almost 18% (\$3.8 trillion) of its Gross Domestic Product on health consumption. More precisely, the chart below shows how the U.S. spent health care dollars.

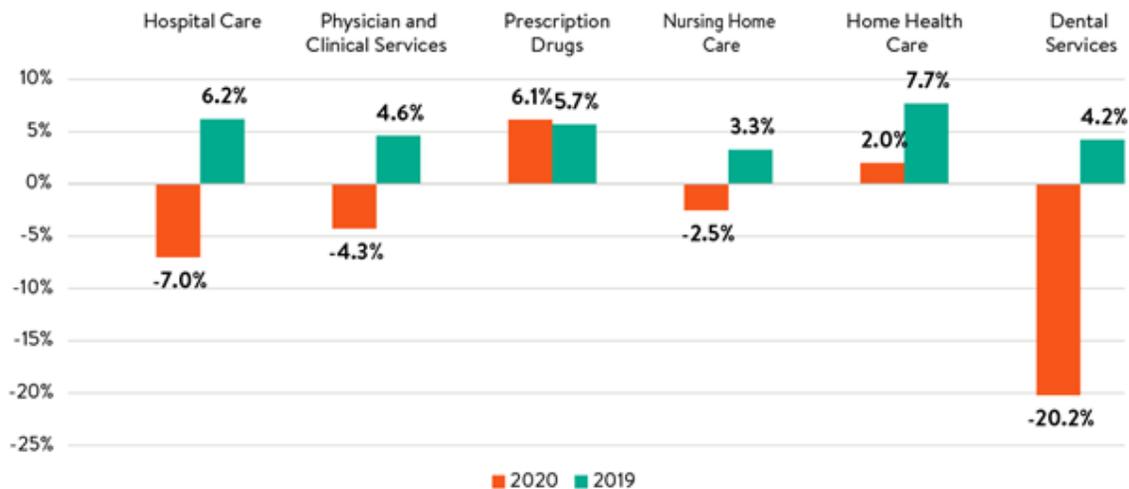
*Figure 1 Distribution of Healthcare Spending in the United States of America*



Creating an opportunity to meet healthcare financial challenges with solutions requires envisioning the value of home-based health care and home care services. In CMS tracking national health expenditures for 2020, primary data indicates a decrease in health spending from

2019 – for the first time since the 1960s. The chart below shows numerous factors that likely contributed to the potential decline in spending, including reductions in hospital and nursing home care, along with an increase in home health care. People prefer and select home care rather than nursing homes generating cost savings for the government. In addition to cost savings, several value-added items, such as trained care providers, self-directed care options, and cost savings for stakeholders, support individuals receiving home-based care.

Figure 2 Annual Health Spending Growth for Selected Categories, 2020 and 2019



Sources: U.S. Bureau of Economic Analysis, Center of Medicare and Medicaid, Altarum Institute

Trained care providers are crucial as the country prepares for the surge of people requiring assistance to live independently. In recent years, Philadelphia had the highest rate of physical, emotional, and cognitive disabilities among large U.S. cities in the country. According to the 2017 American Community Survey Five-Year Estimates, approximately one in seven Pennsylvanians with one or more disabilities from 2013 to 2017, totaling just over 1.73 million, which exceeds the national rate of 12.6%.

A more precise breakdown of census data revealed that Philadelphia led the nation in mental disabilities (7.7%) and ambulatory difficulty (9.6%). The population over 65 had the highest rate of persons with disabilities; specifically, 75 years and older were at the top of the percentile. Currently, 212,274 Philadelphians are 60 years and older, representing approximately 18% of the total city population; and 36% are 75 years and older, and 8% are 85 and older. As disabled and aging populations demonstrated an increase, how and where these people age are burgeoning critical questions that should be at the forefront of advocacy platforms, solution development, and health and housing discussions.

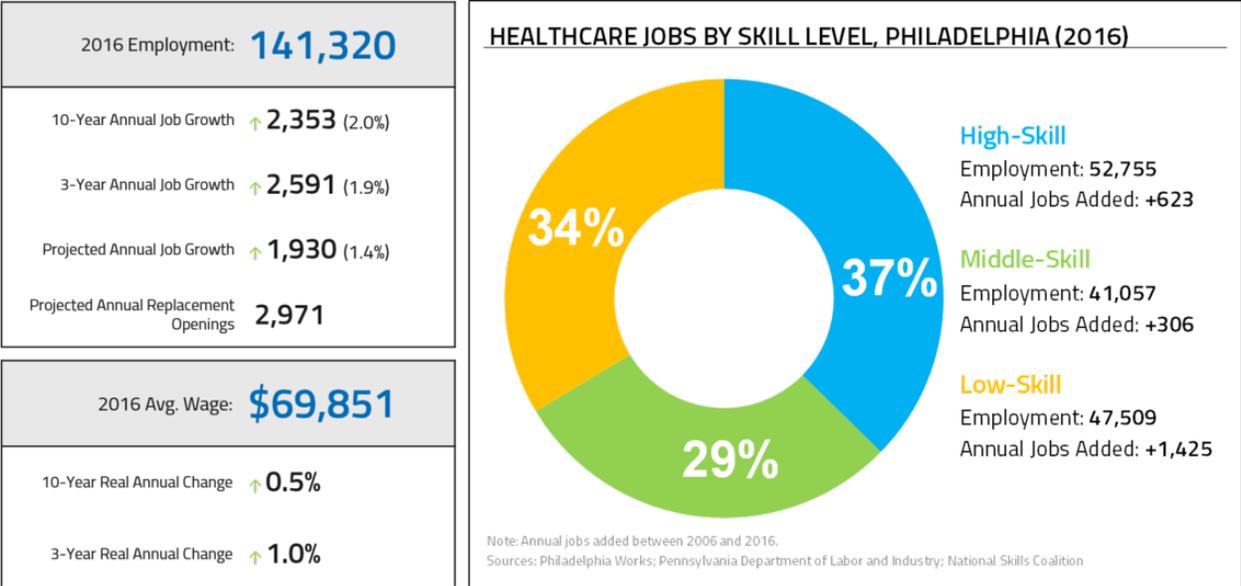
## *An Opportunity*

The Healthcare/Health Service Industry's importance as an essential solution for naturally caused emergencies has increased over time. With the addition of paraprofessionals like home health aides, medication technicians, and community health workers, health agencies and medical facilities can service patients cheaper while remaining in their homes and communities, especially during global, national, and local health crises. Unfortunately, with the rapid growth of these advancing fields of study linked to COVID-19, shortages have occurred, and these jobs have become vital positions necessary to eradicate public health emergencies.

Over the past few years, this shortage has led to the understaffing of key health professionals in critical care situations globally. In Philadelphia, many residents 50 and over (though, mostly over 70) experience disabilities associated with aging. As a result, there is an expanding need for excellent affordable home care services, provided by well-trained, empathic home health aides, informal caregivers, direct care workers, and personal attendants.

Currently, there are approximately 80,000 people unemployed, as reported by the Dept. of Unemployment Services (Philadelphia CareerLink, February 2021), and more than 100,000 jobs in the healthcare and health service industry in the Philadelphia area and the outlying suburbs in May 2021 (P.A. CareerLink, May 2021). The Economic League of Greater Philadelphia (October 2021) reported that Healthcare/Health Services is the most significant target sector, with more than 140,000 jobs in Philadelphia. This sector accounts for 21.3% of total employment, including core industries such as hospitals, physicians' offices, home health care services, and nursing care facilities.

The healthcare and health services sector supports the supply chains or product delivery industries, such as medical equipment wholesalers, optical goods stores, and health and personal care stores. In recent years, it also added the most jobs among target sectors, with an annual average of 2,400 new jobs since 2006. At \$70,000, the yearly average salary is more than 12% higher than the average salary in Philadelphia. The sector supports a balanced mix of jobs by skill level, with middle-skill jobs accounting for 29% of all jobs in the industry (Philadelphia Works, 2016).



With the expansion of the services for the elderly, there is an opportunity to reduce recidivism-related acute hospitalization for loved ones and consumers, meet specialized home care demands, and existing paraprofessionals to take advantage of the current surge in job growth within middle-skill and high skilled jobs.

## Data Collection and Analysis

More than a dozen individuals were interviewed to inform HCA's proposed skill-building programs in the Philadelphia area. These interviewees represent a wide swath of those providing care and their understanding and usability of a community-based skill-building program.

Groups	# of Participants	Level of Interest (1-5)	Training Needs	Previous Training	Willingness to Pay (Yes/No)
Informal Family Caregiver	6	5	Everything (This group lack the most training)	No	Yes
Self-Directed Care	3	5	Everything	Yes. (CPR, First Aid & Intro Care Classes)	Maybe (Thought Consumer should Pay via Government)
Direct Care Worker	2	3	Everything	Yes. (CPR, First Aid & Intro Care Classes)	No (Thinks Agency/Government should Pay)
Home Health Aide	3	2 (Only interested if Training increases Pay)	Specialized Areas (Wound Care, Dementia & Self-Care)	Yes; certified.	No
Training Organization	1 Only hires Home Health Aides	4	Outsourced. Seeking external training organization	No. Contractual agreement with 3 <sup>rd</sup> Training Partner	Yes

### Demographic Data:

1. Identified as Black
2. Forty-two (42) years of age and older
3. Low-income (85% were a one income household )
4. High School Graduates
5. Ninety percent (90%) Women
6. Sixty percent (60%) provide care for others
7. Forty percent (67%) of home health aides work for multiple agencies

## The Solution

### *The Center for Health Services Education and Training*

Home Care Associates recognizes the broad and growing need for training, workforce and professional development, and community health education for caregivers. To better serve their clientele, HCA has proposed establishing a Center for Health Services Education and Training (CHSET). CHSET is envisioned as a 501(c)3 organization, separate from the HCA organization's umbrella.

CHSET will provide training and educational opportunities with distance learning options for participants interested in pursuing careers in the healthcare/health service industry. Recruitment strategies include engaging high school graduates, existing health care workers, Temporary Assistance for Needy Families recipients, unemployed and underemployed residents, informal caregivers & partnering agencies interested in entering a career or advancing knowledge in the health services. CHSET will create an environment that encourages learning and professional growth dynamic, creative, and inclusive environment that promotes engaged learning and scholarship

### *CHSET Organizational Mission*

In addition to technical skills, participants will learn the intangible side of the business – the importance of time and attendance, appropriate work attire, personal hygiene, and a positive "can't fail" attitude. The CHSET program will consist of three health service tracks, focusing on industry demands in Philadelphia and the surrounding area within health service and health care communities.

Three potential tracks and training options:

- Workforce and professional development and training in specialized industry areas
- Job training, readiness, placement, and retention
- Community health programs for informal caregivers

Participants who complete the program will become highly qualified workers in health services capable of furthering their marketability, attaining certification, and establishing employment options in the local economy.

## CHSET Goals

An established set of organizational goals and objectives guide CHSET's launch and initial programming. Aligned goals and work plan are listed below:

Goal A: Train at least 250 participants per year in a quality Health Services Program using National Accreditation and Certification Standards

- Process Objective #1: To create a Health Service Education and Training Program by June 1, 2022
- Process Objective #2: To create a program based on National Standards and Accrediting Authorities
- Process Objective #3: To recruit 500 participants by May 1, 2022

Goal B: Produce qualified health professionals with core competencies in health services that become certified Home Health Aides, Direct Care Workers, Personal Attendants; and receive advanced/specialized Healthcare Workforce professionals and educated informal caregivers in urban communities leading to a living-wage career path

- Process Objective #1: To train and educate students in health services, health technology competencies, and healthcare professional development inclusive of specializations.
- Process Objective #2: To have 50% of entering students complete the program

Goal C: Refer 80% of Job Training graduates to Home Health opportunities and validate 95% Direct Care Workers and Personal Attendants certifications upon program completion

- Process Objective #1: To develop employment pathways and opportunities for Home Health Aides, Direct Care Workers, and Personal Attendants
- Process Objective #2: To prepare participants for available positions and enhance marketability
- Process Objective #3: To mentor participants as needed for employment advancements of all participants that completed the program (*Duration: up to 1 year*)

Goal D: Advance 40% of Workforce Development participants' professionalism and subject matter knowledge for current and future employment roles and aspirations in Health Services

- Process Objective #1: To provide cutting-edge educational content and presentations that provide existing workers with the skills to enhance their professional development for advancement
- Process Objective #2: To enhance participant's professionalism and marketability

Goal E: Increase 80% of informal caregivers' knowledge, skills, and abilities in providing supportive services and finding and accessing economic opportunities that help family members and, or friends requiring assistance to remain at home in their community.

- Process Objective #1: Identify and address participants' absence of knowledge, skills, and abilities regarding the delivery of appropriate care
- Process Objective #2: Establish a support network inclusive of formal service providers for participants

Goal F: Acquire 100% of the resources required to create and support the Center for Health Services Education and Training program

- Process Objective #1: Determine the amount of funding and other resources needed to create and operate CHSET
- Process Objective #2: Develop a resource acquisition strategy that includes letter solicitation, fee for service activities, crowdfunding, and proposal writing
- Process Objective #3: Develop and activate a Proposal Solicitation Process

### *Supportive Services*

CHSET attendees will continuously receive supportive service to assist with resolving any issues that may be barriers on their road to success. Supportive Services referrals will include, but are not limited to:

- Child Care Services/After School
- Transportation Assistance
- Work Clothes
- Work Equipment
- Official Government Issued Identification
- Criminal Background Checks
- Onsite access to Computers /Digital Equipment & Software to support participant educational, financial, professional, and Informational needs
- Employment Assistance
- Ongoing Professional Development

Job placement following participation in CHSET is critical. Several opportunities for job placement services are already identified. Additionally, continued monitoring is needed to ensure success and identify CHEST growth opportunities.

### *Employment*

- CHSET will work closely with our partners, identify training, and employment for participants who earn their industry-recognized certification. This coordination enables participants to obtain living-wage career path employment with health & welfare benefits.
- Students will be afforded opportunities to work with several of our partners, who will provide hands-on work experiences for those pursuing Certified Nursing Assistants and Home Health Aides.
- Workforce development operations will identify and contact prospective employers to ascertain projected turnover dates in entry-level job classifications; secure copies of required qualifications, review job descriptions; and match the employer's needs with pre-screening of participants.
- Develop a survey instrument to gauge the satisfaction level of employers who hire our students. Combined with student feedback of the program's effectiveness and adjust, as needed.

### *Data*

- CHSET will collect data to create a baseline for students and track measures towards achieving the education, training, employment, and support services associated with each participant to measure the progress achieved towards their goals
- Mapping assets will be identified to match student needs, assist with resource acquisition, monitor progress towards program goals, and recommend adjustments, as appropriate. Educators, employers, and support service personnel will anchor components of the program.

### *CHSET Growth Opportunities*

- CHSET will have an opportunity to expand training offers to include continuing allied health education after the third year of operations to serve local, certified allied health professionals who need continuing education to maintain their certification.
- CHSET may want to offer advanced programs in the future and attract post-secondary educational partnerships and recent college graduates interested in the health service field.
- These programs require associate and baccalaureate degrees with significant biology and chemistry requirements that CHSET does not currently offer to students.
- Beginning of the fifth year, the center will expand to include other training options and workforce development opportunities, focusing on health service and allied health careers experiencing rapid growth in this region and across the country.
- Additional training in health science career paths include indirect care positions, such as:
  - Health Informatics
  - Electronic medical records
  - Health information systems
  - Medical terminology
  - Coding
  - Medical assistants
  - Patient rights
  - Patient surrounding care
  - Palliative care

### *Marketing*

- Multi-lingual marketing materials will be designed for distribution and consist of:
  - Social Media (Twitter, Facebook, YouTube, etc.)
  - Flyers
  - Informational Meeting
  - Text Messages
  - Emails
  - Mail
  - Newsletter
  - Public Service Announcements
- Marketing materials will highlight CHSET's benefits, including but not limited to:
  - Location
  - Cost (Access to available financial aid)

- Facility Amenities
- Alignment with industry
- Access to Service Provider Agencies
- Work Opportunity Projections
- Application of employer incentives for job placement

### *Accreditation*

There are no current accreditations available for a standalone homecare training organization; however, there are three accrediting bodies for home and community-based health care organizations with training options.

- Community Health Accreditation Partner <https://chapinc.org>
- The Joint Commission <https://www.jointcommission.org/accreditation-and-certification/health-care-settings/home-care/learn/our-standards/>
- National Association of Homecare and Hospice <https://www.nahc.org/about/>

### *Launching CHSET*

Creating a new educational and training center requires resources and a significant number of administrative tasks. For the launch of CHSET, there are several duties necessary, which includes:

- Create a 501c3
- Identify Public and Private Sources, including
- Private Foundations
- Corporate Philanthropy
- Financial Institutions (Community Reinvestment Act)
- Local Political Representatives
- City, State, and Federal Grant Opportunities
- Analyze Biden's Soft Infrastructure plan within the budget reconciliation

### *Hiring a Project Management Professional*

An Independent Project Manager (PM) is needed to lead CHSET. This person will perform the following implementation tasks related to the CHSET project (inclusive of other duties linked to the project):

- Formulate, organize, and monitor inter-connected projects
- Decide on suitable strategies and objectives
- Coordinate cross-project activities
- Lead and evaluate associated project staff
- Develop and control deadlines, budgets, and activities
- Apply change, risk, and resource management
- Assume responsibility for the program's people and vendors
- Assess program performance and maximize ROI
- Resolve projects' high-level scope issues
- Prepare reports for program directors

Additionally, the PM is required to oversee, evaluate, and review all construction, program, and contract-related activities connected with the CHSET, located at 1500 Walnut Street, Suite 1000, Philadelphia, PA 19102. Further, the PM is responsible for completing an audit of documents that details all activities and compliance requirements for applicable agencies.

### *Sample Job Description for Project Management Professional*

The Project Manager (PM) plans, directs, and coordinates the CHSET to ensure that goals and objectives of the project scope are accomplished on schedule and within funding parameters by performing the listed duties personally and through subordinates and partners.

The PM is responsible for achieving operational objectives by contributing information and recommendations to strategic plans and reviews, preparing, and completing action plans, implementing production, productivity, quality, and customer-service standards resolving problems, conducting audits, identifying trends, determining system improvements, implementing change. Travel is primarily local during the business day, although some out-of-the-area travel and overnight may be expected.

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties, or responsibilities that are required. Duties, obligations, and activities may change at any time with or without notice.

#### Essential Duties And Responsibilities

- Reviews program proposals and plan to determine timeframes, funding limitations, procedures for accomplishing project, staffing requirements, and allotment of available resources to various phases of the program
- Establishes work plan and staffing for each phase of the program and arranges for recruitment or assignment of program personnel, volunteers, and service providers
- Serves as CHSET's liaison with collaborative public and private partners to coordinate program activities
- Confers with program staff to outline work plans, assigns duties, responsibilities, scopes of authority, and provides technical assistance to resolve problems
- Directs the maintenance of fiscal records to control expenditures; reviews periodic and special reports on the status of accounts, and instructs for the preparation of requests of funds to meet anticipated needs
- Verifies the accuracy of all expenditures and recommends budgets modifications as required
- Coordinates cross-program activities to ensure the maximum use of internal CHSET resources
- Reviews contract proposals submitted by subordinates for compliance with federal, state, and local funding requirements
- Ensures the accuracy of data collection and timely program reporting

- Develops systems to improve program operations, coordination, and collaboration among staff
- Submits program performance and financial status reports status at predetermined intervals

#### Required Knowledge, Skills, And Abilities

- Knowledge of the basic principles, methods, and techniques of project/program management techniques and practices related to education, health care, social welfare, and other support programs designed to reduce and remove the barriers to economic self-sufficiency and personal self-reliance
- Knowledge of performance monitoring and change management
- Knowledge of M.S. Office Suite
- Ability to relate to a wide range of issues, people, and institutions
- Ability to plan, organize, develop, and implement beneficial programs and activities for public housing residents
- Ability to build and maintain effective working relationships with peers, managers, subordinates, residents, service providers, and members of the general public
- Ability to prepare technical reports and offer appropriate recommendations
- Ability to read, write, speak, and understand Spanish is a plus
- Experience providing leadership and organizational skills
- Possession of excellent communication, problem-solving, team building, and oral and written communication skills

#### Minimum Acceptable Training And Experience

Bachelor's degree from a recognized college or university in healthcare, workforce development, management, or a related field, plus seven (7) years of experience, three must have been at the management level directing the provisions of administrative services. The experience must include program planning, policy formulation, interpretation of standards, and program maintenance.

#### Overview Of Project Management

##### *Project Planning*

- A project can begin and is designed to fail if there wasn't a plan devised to see it through on time and within budget. The project manager's first role is making a feasible plan that achieves the goals and objectives of the project and aligns with the organization's overall business strategy. This involves creating a project schedule, securing the resources, defining the project goals, among many other things.

##### *Assembling and Leading a Project Team*

- Project managers need resources to complete the project tasks, including skilled and experienced team members. A project manager either takes a leadership role with an existing project team or creates one. Once a team is created, you need to establish a

project schedule to assign them tasks and deadlines, give them the tools to collaborate, and don't get in their way by micromanaging every activity. Meet regularly, of course, and get status updates to chart their progress while reallocating resources as needed to avoid blocking team members or overburdening them.

#### *Time Management*

- Time is always ticking towards the project deadline. While communication is critical to address changes and ensure everyone is doing what they need to do, the project manager must also define, schedule, and accurately estimate the task duration to develop and maintain a realistic project schedule.

#### *Resource Management*

- Nothing is going to get done without money. Figuring out the proper funding for the project, having that get accepted, and then keeping the project within or under budget will make or break a project. You can get your stakeholders their deliverables on time, but the project fails if that costs more than the budget you created.

#### *Stakeholder Management*

- You want to deliver to your stakeholders what they expected or better and ensure they're satisfied with the results. But that doesn't mean ignoring them to focus solely on the project. Instead, you need to constantly communicate with them, reporting on progress and being open to their feedback to keep them happy and coming back to you with future projects.

#### *Risk Management*

- Problems will inevitably arise in a project. That's called an issue. You need to be ready for them and work towards resolving them quickly so they don't take your project off-track. Then there are risks, which are potential problems that have yet to occur or might not ever. Regardless, you must figure out beforehand what the chances are and set a plan of action if they occur.

#### *Monitoring Progress*

- To ensure a project progresses as planned, you must constantly measure it and compare those metrics against the plan you created. Therefore, you must have a way to collect project data, such as status reports from your team, to see if the project's actual progress is meeting what you had initially planned.

#### *Reporting and Documentation*

- Reporting is one of the ways you communicate with your team and stakeholders. While teams need more detailed information and stakeholders are looking for broader data to check the project's progress, both are essential tasks for the project manager. All paperwork must be collected, signed, and archived by the end of a project, and this action provides a history that you can revisit when planning for a similar project in the future.

## List Of Required Documents For CHSET

Starting a new educational training program requires significant research that informs several elements in an organizational development plan. The pre-implementation plan for CHSET is contained in the pages that follow. These documents are CHSET's foundation.

- *Statement of Work & Project Scope*: project expectations
- *Work Plan*: how each goal will be operationalized
- *Schedule*: a five-year schedule for initialization
- *Participant Flow*: how participants interact throughout the training program
- *Project Plan Organizational Chart*: proposed organizational chart
- *Projected Organizational Budget Template*: project revenue and expenses
- *Funding Opportunities*: grantmaking options

## Statement Of Work

### *Project Purpose:*

Home Care Associates (HCA) is seeking to design and create a health services education and training program with distance learning options called “Center for Health Service Education and Training” (CHSET). This program will consist of the following:

- The creation of three (3) health service tracks training programs, focusing on industry demands in Philadelphia and the surrounding area within health service and health care communities.
- The training program tracks include (1) workforce development, (2) job training, and (3) community health programs that provide residents of Philadelphia and local counties with career options in the health service industry.
- The program will train, produce and advance highly qualified workers in health services capable of furthering their marketability, attaining certification in their fields, and establishing employment options in the local economy.
- The development process includes formulating curriculum documents, research materials, and support services for students in the program, establishing a remote access platform, and procuring technology lab equipment.
- This center will include a Program Director (PD), as well as trained educational faculty and staff. The PD will oversee the hiring of qualified professionals for teaching, guidance counseling, and program operations.

HCA is required to hire an Independent Project Manager (PM) to perform the following implementation tasks related to the CHSET project (inclusive of other duties linked to the project):

- Formulate, organize, and monitor inter-connected projects
- Decide on suitable strategies and objectives
- Coordinate cross-project activities
- Lead and evaluate associated project staff
- Develop and control deadlines, budgets, and activities
- Apply change, risk, and resource management
- Assume responsibility for the program’s people and vendors
- Assess program performance and maximize ROI
- Resolve projects’ high-level scope issues
- Prepare reports for program directors

Additionally, the PM is required to oversee, evaluate, and review all construction, program, and contract-related activities connected with the CHSET, located at 1500 Walnut Street, Suite 1000, Philadelphia, PA 19102. Further, the PM is responsible for completing an audit of documents that details all activities and compliance requirements for applicable agencies.

## Applicable Documents

Document Format	Title	Date
	Program design and implementation schedule	
	Project Manager Job Description	
	Project Scope of Work	
	CHSET Work Plans	
	Project Budget	
	CNA Accreditation documents (Renewal or new application)	
	Configuration of Distance Learning Platform and Remote Access Equipment	
	MOU for HCA & New Educational and Training Institute (CHSET)	
	Copies of Health Services Education Curriculums	
	Accrediting documents for Council for Accreditation of Allied Health Education Programs (CAAHEP) — for other industry certifications (contingent upon partnerships with post-secondary educational partners)	
	Program audit checklist for state and local requirements	
	Staff Plan	
	CHSET Position descriptions for staff	
	Labor market analysis for industry growth and potential employment opportunities	
	Hiring process and documentation for potential staff	
	List of potential employment opportunities for participants who completed the training programs	
	Infrastructure schematic design plan for space (inclusive of technology lab buildout)	
	Engage network partnership of supportive service providers for participants	
	Procurement List: furniture, technology equipment, medical devices, books and materials, etc.	

## *Background*

The health service fields have arisen as an essential solution for naturally caused emergencies. With the addition of paramedical professionals like home health aides, medication technicians, community health workers, and more, health service agencies and medical facilities can service patients at a lower cost and in homes and communities, especially during global, national, and local health crises. Unfortunately, with the rapid growth of these advancing fields of study linked to COVID-19, shortages have occurred, and these jobs have become vital positions necessary to eradicate public health emergencies. Over the past few years, in particular, this shortage has led to the understaffing of key health professionals in critical care situations globally.

As Baby Boomers, one the largest of our recent generations, retire, the shortage of health service professionals specializing in elderly care or gerontology will become even more critical. The fastest-growing population in Philadelphia is residents 50 and over, mainly persons well over 70. Not all, but many, experience disabilities with age. As a result, there is an expanding need for high-quality affordable home care services. Associated with the need for facilities and community-based services is the need for well-trained, empathic home health aides, direct care workers and personal attendants who can fulfill basic and specialized supportive functions in health maintenance and personal needs support. Data from the Paraprofessional Healthcare Institute (PHI) shows that occupational growth projections for home health aides and related services are going to increase by forty-seven percent by 2024.

The CHSET provides workers with the workforce development and job training, with some virtual classroom instruction opportunities, needed to fulfill health service jobs locally and across the country. Once the center develops a partnership with a post-secondary institution, the program will be able to obtain accreditation from the Commission on Accreditation of Allied Health Education Programs (CAAHEP). In Philadelphia, PA, there are approximately 80,000 unemployed people, as reported by the Dept. of Unemployment Services (Philadelphia CareerLink, February 2021) and approximately 100,000 jobs in the healthcare industry in the Philadelphia area and the outlying suburbs in May 2021 (PA CareerLink, May 2021). This situation presents a challenge in Philadelphia, there are not enough qualified workforce development and job training programs with tele-learning access options for residents to gain advanced knowledge and be confidently employed in the health service industry, especially as Home Health Aides, Direct Care Workers, and Personal Attendants.

## *Project Scope:*

The Home Care Associates' Center for Health Services Education and Training (CHSET) will be physically located at 1500 Walnut Street, Suite 1000 in Philadelphia, PA. All classroom, lab and clinical activities will commence on May 1, 2023.

The purpose of the CHSET is to provide training and educational opportunities with distance learning options for participants (including service consumers), high school graduates, existing health care workers, TANF recipients, unemployed and underemployed residents, informal caregivers & partnering agencies interested in entering a career or advancing knowledge in the health services.

HCA identified many job categories that have vacancies within the community, hospital, and long-term facilities within the region. These job categories are: Home Health Aides, Certified Nursing Assistant/Medical Surgical Technologist, Emergency Department Technician, Unit Secretary, Medical Technologist, Phlebotomist, Medical Laboratory Technician, Ultrasound Technician, Radiology Technician, Cytotechnologist, Pharmacology Technician, Cardiac Catheterization Laboratory Technician, Echocardiogram Technician, Respiratory Therapist/Technician, Surgical Technologist, and Surgical Technician. Some of these programs have limited feasibility for the CHSET program. They require associate and baccalaureate degrees with significant biology and chemistry requirements that CHSET does not currently offer to students.

The CHSET may want to offer those programs in the future and attract post-secondary educational partnerships and recent college graduates interested in the health service field. Since most of the initial students for the CHSET program will come from the existing health care workforce, TANF recipients, partnering agencies, unemployed and underemployed residents, and the members of the Philadelphia community-at-large, it is vital to target programs that initially require only a high school diploma. Though some of the career opportunities above are good subjects for the CHSET to offer, the center will start with job training for Home Health Aides, Direct Care Workers, and Personal Attendants. The program's initial capacity is for 250 participants. This number would double by year three.

It is also an expectation that the CHSET will expand to include continuing allied health education after the third year of operations. This expansion will serve local, certified allied health professionals who need continuing education to maintain their certification. This program will also provide workforce development and training in specialized areas of study for allied health professionals. In the beginning of the fifth year, the expectation is the center will expand to include other training options and workforce development opportunities—focusing on health service and allied health careers that are experiencing rapid growth in both this region and across the country.

### *Requirements*

**A:** Program design documentation indicating the finalized curriculum, staffing plan, and outline of courses required in each discipline will be prepared and delivered to appropriate authorities for review. Those same documents, along with any additionally requested materials, will also be given to the respective accrediting bodies for the training programs being utilized. Supportive Services offices, as well as a student lounge, job placement assistance, technology lab, and research materials, will also be required for accrediting authorities.

**B:** The result from the program audit report should include a thorough evaluation of all contract activities and should be presented in a format conducive to the format requirements of accrediting authorities.

**C:** Construction plan including the location of the project site, buildings and other infrastructure, grading activities, schedules for implementation, and other pertinent information related to the project site

### *Monitoring plan*

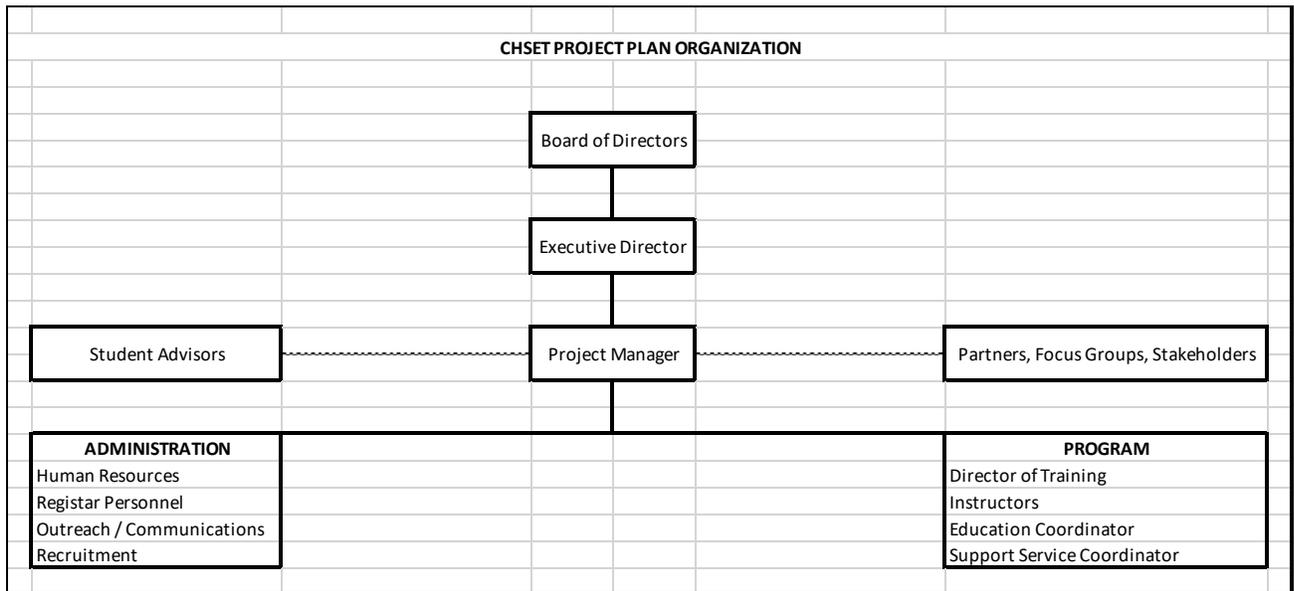
<b>Performance Measurements and Surveillance Plan</b>		
<i>Performance Requirements</i>	<i>Performance Measurements</i>	<i>Monitoring Methodology &amp; Frequency</i>
Design and creation of training programs (inclusive of Distance Learning Modules)	All three training programs must be designed in compliance with national and local standards and accreditation guidelines	Initial & final reports on program design, documentation indicating review by national accrediting bodies, delivery of curriculum for three training programs
Design and creation of support services offices, materials, and resources	The student support office must provide academic and social support and supportive services for students in the CHSET	Support services office design, staffing plan, and outline of services to be provided
Develop a construction plan to retrofit training infrastructure and required materials	Blueprint alignment with program and space requirements	Construction matrix with detailed buildout data and timeline

### *Project Manager Deliverables*

<b>Deliverable</b>	<b>Quantity</b>	<b>Format and Method of Delivery</b>	<b>Due Date</b>
Monthly Performance reports		Microsoft Word: email, and hard copy delivery	

Year-End- Report		Microsoft Word: email, and hard copy delivery	
Independent Auditor's Report		Microsoft Word: email, and hard copy delivery	
State's Accreditation of CHSET		Hardcopies	
Program Design with curriculum for each training program		Hard copies and emailed versions	
Staffing plan, position descriptions, and hiring process documentation		Microsoft Word: email, and hard copy delivery	
Progress reports on students in the program		Microsoft Word and Excel: email and hard copy	
Documented program review process of national accrediting bodies		Microsoft Word: email, and hard copy delivery	
Weekly construction progress meetings and updated project management matrix		Microsoft Word: email, and hard copy delivery	

# Project Plan Organizational Chart



## Work Plan

<b>Agency: Home Care Associates</b>	<b>Program Model / Name: Center for Health Services Education &amp; Training</b>		
<b>Program Area: Philadelphia Metropolitan Area</b>	<b>Primary Target Population: Residents (including service consumers), High School Grads, Existing Health Care Workers, TANF Recipients, Unemployed and Underemployed Residents, Informal Caregivers &amp; Partnering Agencies</b>		
<b>GOAL A: Train at least 250 participants per year in a quality Health Services Program using National Accreditation and Certification Standards</b>			
<b>Measurable Objectives/Activities</b>			
<b>Process Objective #1: To create a Health Service Education and Training Program by June 1, 2022</b>			
<u>Key activities needed to meet this objective:</u>	<u>Start Date/s:</u>	<u>Completion Date/s:</u>	<u>Key Personnel (Title)</u>
<ul style="list-style-type: none"> <li>▪ Research and design three training programs (Workforce Development, Job Training &amp; Community Health Programs) with distance learning options</li> <li>▪ Confirm feasibility of location for the program</li> <li>▪ Complete construction on space</li> <li>▪ Order furnishings, materials, hire staff, outfit space</li> </ul>	TBD By PM & Team	TBD By PM & Team	Executive Director Stakeholders Partner Agencies PM Director of Training Educational Coord Administrative Staff

<b>Process Objective #2: To create a program based on National Standards and Accrediting Authorities</b>			
<u>Key activities needed to meet this objective:</u>	<u>Start Dates:</u>	<u>Completion Dates:</u>	<u>Key Personnel (Title)</u>
<ul style="list-style-type: none"> <li>▪ Ensure program curriculum and learning outcomes are aligned with National accreditation</li> <li>▪ Submit program outlines and materials to accrediting bodies</li> <li>▪ Measure accreditation specific outcomes and engage in self-study</li> <li>▪ Assess and evaluate the quality of the education programs</li> </ul>	TBD By PM & Team	TBD By PM & Team	PM External Evaluator
<b>Process Objective #3: To recruit 500 participants by May 1, 2022</b>			
<u>Key activities needed to meet this objective:</u>	<u>Start Dates:</u>	<u>Completion Dates:</u>	<u>Key Personnel (Title)</u>
<ul style="list-style-type: none"> <li>▪ Develop marketing plan</li> <li>▪ Design and disseminate marketing materials (implement recruitment campaign)</li> <li>▪ Conduct outreach to 500+ potential participants</li> <li>▪ Contact potential partnering agencies and organizations</li> <li>▪ Convert, select, and admit 50% into the program (create waiting list)</li> </ul>	TBD By PM & Team	TBD By PM & Team	PM Resource Dev Staff Recruitment Staff Registrar Personnel Communication Staff

<b>Agency: Home Care Associates</b>	<b>Program Model / Name: Center for Health Services Education &amp; Training</b>		
<b>Program Area: Philadelphia Metropolitan Area</b>	<b>Primary Target Population: Residents, High School Grads, Existing Health Care Workers, TANF Recipients, Unemployed and Underemployed Residents, and Informal Caregivers</b>		
<b><u>GOAL B:</u> Produce qualified health professionals with core competencies in health services that become certified Home Health Aides, Direct Care Workers, Personal Attendants; and receive advanced/specialized Healthcare Workforce professionals and educated informal caregivers in urban communities leading to a living-wage career path</b>			
<b>Measurable Objectives/Activities:</b>			
Process Objective #1: To train and educate students in health services, health technology competencies, and healthcare professional development inclusive of specializations.			
<u>Key activities needed to meet this objective:</u>	<u>Start Date/s:</u>	<u>Completion Date/s:</u>	<u>Key Personnel (Title)</u>
<ul style="list-style-type: none"> <li>▪ Create and implement national standard and accrediting curriculums for Workforce Development, Job Training &amp; Community Health Readiness Programs</li> <li>▪ Provide health technology training (using smart technology)</li> <li>▪ Provide basic industry-specific training (OSHA, HIPAA, Crisis Communication, CPR, First Aid, AED)</li> </ul>	TBD By PM & Team	TBD By PM & Team	PM Director of Training Educational Coordinator Instructors

Process Objective #2: To have 50% of entering students complete the program.			
<u>Key activities needed to meet this objective:</u>	<u>Start Dates:</u>	<u>Completion Dates:</u>	<u>Key Personnel (Title)</u>
<ul style="list-style-type: none"> <li>▪ Provide tutoring, advising, counseling, and other student support services</li> <li>▪ Provide Labor Market Health Services information with specific data and research materials</li> <li>▪ Teach time management and provide strategies to navigate potential barriers</li> <li>▪ Implement feedback and evaluation loops</li> </ul>	TBD By PM & Team	TBD By PM & Team	PM Director of Training Supportive Svr Coord Educational Coord
Process Objective #3: To receive 70% participant training satisfaction upon completion of training/workshop			
<u>Key activities needed to meet this objective:</u>	<u>Start Dates:</u>	<u>Completion Dates:</u>	<u>Key Personnel (Title)</u>
<ul style="list-style-type: none"> <li>▪ Design a post-customer-friendly survey for each program (readability, understandability &amp; relatability)</li> <li>▪ Establish a community-based participatory approach (include participants in design)</li> <li>▪ Create an easily accessible platform for survey dissemination and response (electronic, hard copy, etc...)</li> </ul>	TBD By PM & Team	TBD By PM & Team	PM Focus groups Stakeholders Director of Training Educational Coord

Agency: Home Care Associates	Program Model / Name: Center for Health Services Education & Training		
Program Area: Philadelphia Metropolitan Area	Primary Target Population: Job Training Participants, Consumers & Partnering Agencies		
<b>GOAL C: Refer 80% of participants that completed the Job Training program to Home Health opportunities and validate 95% Direct Care Workers and Personal Attendants certifications upon program completion</b>			
Measurable Objectives/Activities:			
Process Objective #1: To develop employment pathways and opportunities for Home Health Aides, Direct Care Workers, and Personal Attendants			
<u>Key activities needed to meet this objective:</u>	<u>Start Date/s:</u>	<u>Completion Date/s:</u>	<u>Key Personnel (Title)</u>
<ul style="list-style-type: none"> <li>▪ Conduct a census of the metropolitan area home health industry and positions</li> <li>▪ Introduce potential employers to our Center for Health Services Education and Training Program, specifically Job Training</li> <li>▪ Obtain postings of available job-related positions</li> <li>▪ Recruit, promote and support Consumer’s participation in “<i>Services My Way</i>” programming</li> </ul>	TBD By PM & Team	TBD By PM & Team	PM Support Svc Coord Human Res Staff Recruitment Officer
Process Objective #2: To prepare participants for available positions and enhance marketability			
<u>Key activities needed to meet this objective:</u>	<u>Start Dates:</u>	<u>Completion Dates:</u>	<u>Key Personnel (Title)</u>
<ul style="list-style-type: none"> <li>▪ Career counseling</li> <li>▪ Job coaching and soft skills development</li> <li>▪ Host job and career fairs twice a year</li> <li>▪ Required in-service training</li> <li>▪ Offer refresher training</li> </ul>	TBD By PM and Team	TBD By PM and Team	PM Educational Coord Recruitment Officer Director of Training

**Process Objective #3:** To mentor participants as needed for employment advancements of all participants that completed the program (*Duration: up to 1 year*)

<u>Key activities needed to meet this objective:</u>	<u>Start Dates:</u>	<u>Completion Dates:</u>	<u>Key Personnel (Title)</u>
<ul style="list-style-type: none"> <li>■ Create mentorship platform</li> <li>■ Implement tracking methodology (app, database, spreadsheet, communication tools)</li> <li>■ Create alumni database</li> <li>■ Conducting informal verification of employment (via participant and, or partner)</li> </ul>	TBD By PM & Team	TBD By PM & Team	PM Educational Coord Support Service Coord Students Instructors

<b>Agency: Home Care Associates</b>	<b>Program Model / Name: Center for Health Services Education &amp; Training</b>		
<b>Program Area: Philadelphia Metropolitan Area</b>	<b>Primary Target Population: Workforce Participants &amp; Partnering Agencies</b>		
<b><u>GOAL D: Advance 40% of Workforce Development participants' professionalism and subject matter knowledge for current and future employment roles and aspirations in Health Services</u></b>			
<b>Measurable Objectives/Activities:</b>			
Process Objective #1: To provide cutting-edge educational content and presentations that provide existing workers with the skills to enhance their professional development for advancement			
<u>Key activities needed to meet this objective:</u>	<u>Start Date/s:</u>	<u>Completion Date/s:</u>	<u>Key Personnel (Title)</u>
<ul style="list-style-type: none"> <li>▪ Identify career trajectory for upward mobility (Job title)</li> <li>▪ Identify knowledge, skills, and abilities required to advance (Job requirements)</li> <li>▪ Develop a platform for a partnership network to connect participants with real-time interactions and knowledge within the health service industry</li> </ul>	TBD By PM & Team	TBD By PM & Team	PM Supportive Svc Coord Partnering Agencies Educational Coord Stakeholder
Process Objective #2: To enhance participants professionalism and marketability			
<u>Key activities needed to meet this objective:</u>	<u>Start Dates:</u>	<u>Completion Dates:</u>	<u>Key Personnel (Title)</u>
<ul style="list-style-type: none"> <li>▪ Identify the opportunities for participants to achieve living wage employment with health and welfare benefits</li> <li>▪ Enlist industry employers to conduct workshops to familiarize participants with employer expectations, especially regarding time and attendance requirements</li> <li>▪ Identify internship, on-the-job training, and credited volunteer opportunities</li> </ul>	TBD By PM & Team	TBD By PM & Team	PM Partnering Agencies Recruitment Staff Supportive Svc Coord Educational Coord

**Process Objective #3:** To monitor participants’ employment advancements and, or newly learned skill utilization after completion of the program (Duration: up to 2 years)

<u>Key activities needed to meet this objective:</u>	<u>Start Dates:</u>	<u>Completion Dates:</u>	<u>Key Personnel (Title)</u>
<ul style="list-style-type: none"> <li>▪ Create and disseminate a yearly engagement survey</li> <li>▪ Implement tracking methodology (app, database, spreadsheet, communication tools)</li> <li>▪ Create a participant database</li> </ul>	TBD By PM & Team	TBD By PM & Team	Student Communication Staff Stakeholders Administrative Staff

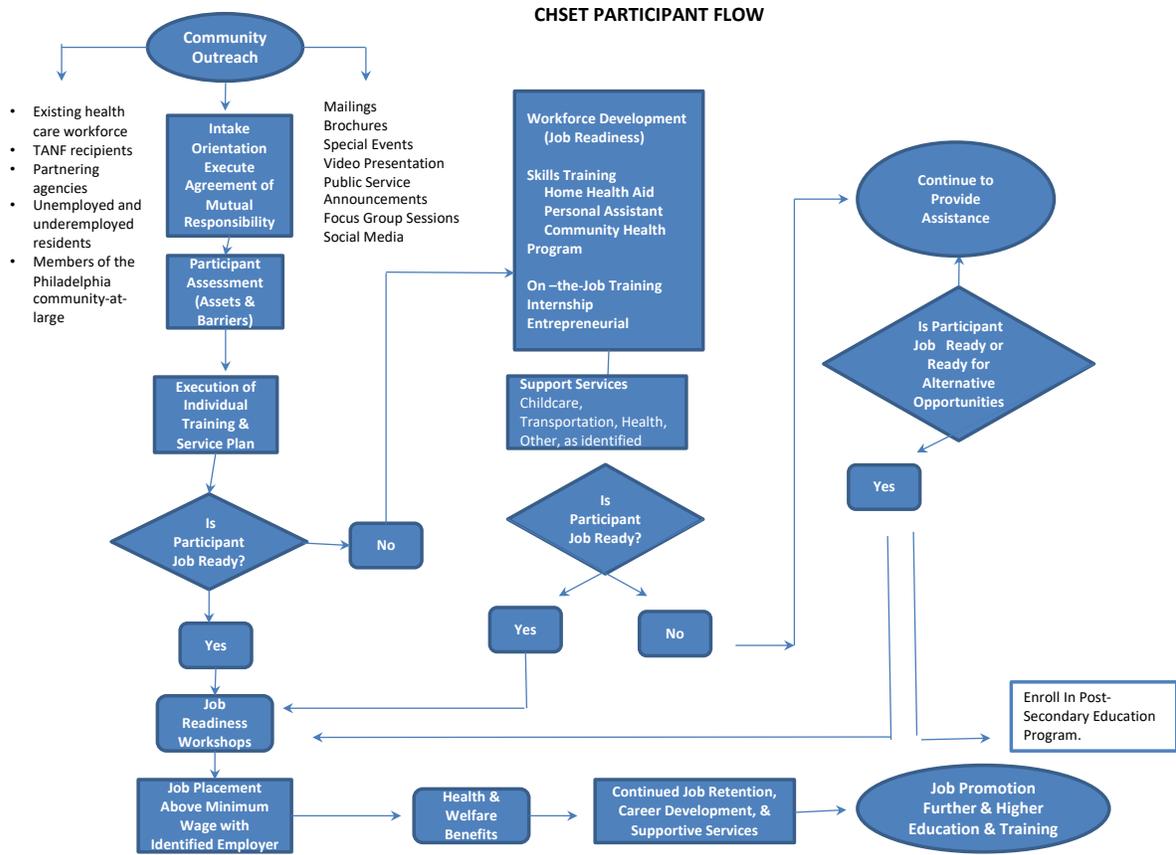
<b>Agency: Home Care Associates</b>	<b>Program Model / Name: Center for Health Services Education &amp; Training</b>		
<b>Program Area: Philadelphia Metropolitan Area</b>	<b>Primary Target Population: Informal Caregivers, Consumers (Family Members) &amp; Partnering agencies</b>		
<b>GOAL E: Increase 80% of informal caregivers' knowledge, skills, and abilities in providing supportive services and finding and accessing economic opportunities that help family members and, or friends requiring assistance to remain at home in their community.</b>			
<b>Measurable Objectives/Activities:</b>			
Process Objective #1: Identify and address participants' absence of knowledge, skills, and abilities regarding the delivery of appropriate care			
<u>Key activities needed to meet this objective:</u>	<u>Start Date/s:</u>	<u>Completion Date/s:</u>	<u>Key Personnel (Title)</u>
<ul style="list-style-type: none"> <li>▪ Design and administer an assessment tool that identifies participants' understanding and expectations related to quality caregiving services and appropriate caregiver functions</li> <li>▪ Provide non-credit Continuing Educational classes and refresher workshops</li> <li>▪ Establish participant-to-family member work sessions</li> </ul>	TBD By PM & Team	TBD By PM & Team	PM Director of Training Educational Coord Supportive Svc Coord Stakeholders Caregivers/Family Mem Partner Agencies
Process Objective #2: Establish a support network inclusive of formal service providers for participants			
<u>Key activities needed to meet this objective:</u>	<u>Start Dates:</u>	<u>Completion Dates:</u>	<u>Key Personnel (Title)</u>
<ul style="list-style-type: none"> <li>▪ Develop collaborative partnership among non-profit, faith-based, local, state, and federal government agencies for participants to help family members maximize access to healthcare, childcare, transportation</li> </ul>	TBD By PM & Team	TBD By PM & Team	PM Director of Training

<p>assistance, sustainable, nutritious food, clothing, legal assistance, and other impediments (social and supportive services)</p> <ul style="list-style-type: none"> <li>▪ Help caregivers coordinate benefits check-up for family members</li> <li>▪ Assist participants with caregiving services and resources to help meet their immediate and short-term needs, as well as their long-term desires</li> <li>▪ Screen, advocate, and refer participants and family members to case management and emergency services as needed (Crisis Care)</li> </ul>			<p>Educational Coord Supportive Svc Coord Stakeholders Caregivers Family Member Partner Agencies</p>
<p><b>Process Objective #3: Create a participant and family member eco-system</b></p>			
<p><u>Key activities needed to meet this objective:</u></p>	<p><u>Start Dates:</u></p>	<p><u>Completion Dates:</u></p>	<p><u>Key Personnel (Title)</u></p>
<ul style="list-style-type: none"> <li>▪ Monitor participants progress towards caregivers success and goals</li> <li>▪ Implement mental health program options</li> <li>▪ Establish peer support groups</li> </ul>	<p>TBD By PM &amp; Team</p>	<p>TBD By PM &amp; Team</p>	<p>PM Director of Training Educational Coord Supportive Svc Coord Stakeholders Caregivers/F amily Mem Partner Agencies</p>

<b>Agency: Home Care Associates</b>	<b>Program Model / Name: Center for Health Services Education &amp; Training</b>		
<b>Program Area: Philadelphia Metropolitan Area</b>	<b>Primary Target Population: HCA Staff &amp; Partnering agencies</b>		
<b>Goal F: Acquire 100% of the resources required to create and support the Center for Health Services Education and Training program</b>			
<b>Measurable Objectives/Activities:</b>			
Process Objective #1: Determine the amount of funding and other resources needed to create and operate CHSET			
<u>Key activities needed to meet this objective:</u>	<u>Start Date/s:</u>	<u>Completion Date/s:</u>	<u>Key Personnel (Title)</u>
<ul style="list-style-type: none"> <li>▪ Conduct a detailed review of program requirements</li> <li>▪ Determine what resources currently exist and what is needed</li> <li>▪ Research cost to justify requests for funding</li> </ul>	TBD By PM & Team	TBD By PM & Team	PM Executive Director Board Director Director of Training
Process Objective #2: Develop a resource acquisition strategy that includes letter solicitation, fee for service activities, crowdfunding, and proposal writing			
<u>Key activities needed to meet this objective:</u>	<u>Start Dates:</u>	<u>Completion Dates:</u>	<u>Key Personnel (Title)</u>
<ul style="list-style-type: none"> <li>▪ Identify and hire Resource Development Personnel</li> <li>▪ Implement the resource acquisition strategy beginning with collecting the known resources of Board members</li> <li>▪ Draft various fundraising solicitation letters to prospective givers</li> <li>▪ Determine CHSET's other non-direct assets that can be provided as a fee for service products</li> <li>▪ Create a compelling crowdfunding solicitation</li> </ul>	TBD By PM & Team	TBD By PM & Team	PM Stakeholders Resource Dev Staff Board of Directors Executive Director Director of Training Communication Staff

Process Objective #3: Develop and activate a Proposal Solicitation Process			
<u>Key activities needed to meet this objective:</u>	<u>Start Dates:</u>	<u>Completion Dates:</u>	<u>Key Personnel (Title)</u>
Identify Public and Private Sources, including: <ul style="list-style-type: none"> <li>○ Private Foundations</li> <li>○ Corporate Philanthropy</li> <li>○ Financial Institutions (Community Reinvestment Act)</li> <li>○ Local Political Representatives</li> <li>○ City, State, and Federal Grant Opportunities</li> </ul>	TBD By PM & Team	TBD By PM & Team	PM Resource Dev Staff Executive Director Board Director Communication Staff

# Participant Flow



## Funding Opportunities

The identification of possible future grant opportunities (forecast or reoccurring) for CHSET, a nonprofit organization with 501c3 status from the IRS, for operations, materials, equipment, etc. The “key word search,” included:

- Education
- Adult Basic Education / Literacy
- Health & Welfare
- Healthcare
- Employment
- Job Preparation / Readiness
- Training
  - Vocational
  - Skilled
- Start-Up

The websites searched were:

- Grant Station (Private)
- Grants.Gov (Public/Private)
- Federal
  - Health and Human Services
  - Labor
  - Education
  - Commerce
- Pennsylvania
  - Department of Education
  - Commerce
  - Labor
- City of Philadelphia

The listed public and private possibilities represent

The following lists of possibilities can be accessed directly or in partnership with other entities. Each resource may be able to support a component of CHSET’s plan, but none are comprehensive. Various steps may be required to achieve eligibility. A brief description of the grant’s purpose is included. I have not located any start-up funding for a non-profit to establish a training program.

### *Federal Government Grant Opportunities*

#### U.S. Department of Labor

- **State Apprenticeship Expansion, Equity and Innovation (SAEEI) Grants - FOA-ETA-21-07:** The SAEI grants will support states to achieve the following goals: 1) Apprenticeship system expansion to support the development, modernization, and diversification of RAPs; 2) Partnership and alignment to support a One Workforce

System vision; 3) Increasing the number of apprentices enrolled in RAPs; and, 4) Innovation in apprenticeship expansion efforts to include program development and recruitment strategies. **This will require efforts to establish CHSET as a recognized apprenticeship program.**

- **YouthBuild - FOA-ETA-21-04:** Under this Funding Opportunity Announcement (FOA), DOL will award grants through a competitive process to organizations providing pre-apprenticeship services that support education, occupational skills training, and employment services to at-risk youth, ages 16 to 24, while performing meaningful work and service to their communities. In addition to construction skills training, YouthBuild applicants may include occupational skills training in other in-demand industries. This expansion into additional in-demand industries is the Construction Plus component, a priority in this grant competition. **This will require efforts to establish a partnership with Philadelphia’s YouthBuild Program.**
- **Pathway Home 2 – FOA-ETA-21-02:** The purpose of this pilot program is to provide eligible, incarcerated individuals in state correctional facilities or local or county jails with workforce services prior to release and to continue services after release by transitioning the participants into reentry programs in the communities to which they will return. These grants are job-driven and build connections to local employers that will enable transitioning offenders to secure employment. Applicants must ensure that occupational training provided has no federal, state, or local regulations that restrict individuals with criminal records from obtaining licenses or other necessary credentials in that career. **Depends on CHSET creations of an outreach program in coordination with a correctional facility, at least with subjects that can be taught remotely.**
- **Federal Bonding ETA-TEGL-10-20:** Through the Federal Bonding Program (FBP), the Department provides fidelity bonds to employers to help reduce the risks of hiring individuals whose criminal backgrounds pose barriers to securing employment. **This is a supportive service that can be an incentive to potential employers.**
- **Workforce Pathways for Youth Grant Program - FOA-ETA-21-01:** This Announcement solicits applications for the Workforce Pathways for Youth grant program. The purpose of this program is to increase alignment between workforce and Out of School Time (OST) programs and expand job training and workforce pathways for youth and disconnected youth including soft skill development, career exploration, job readiness and certification, summer jobs, year-round job opportunities, and apprenticeships.

*Other Federal Grant Opportunities*

Opportunity	Agency	Status	Posted Date	Close Date
FY 2021 American Rescue Plan Act Good Jobs Challenge	DOC	Posted	7/22/2021	1/26/2022

FY 2021 American Rescue Plan Act Good Jobs Challenge	DOC	Posted	7/22/2021	1/26/2022
FY 2021 American Rescue Plan Act Economic Adjustment Assistance Notice of Funding Opportunity	DOC-EDA	Posted	7/22/2021	
FY 2021 American Rescue Plan Act Economic Adjustment Assistance Notice of Funding Opportunity	DOC-EDA	Posted	7/22/2021	
Employer Engagement Program	HHS-ACF-ORR	Forecasted	9/3/2021	
Employer Engagement Program	HHS-ACF-ORR	Forecasted	9/3/2021	
Social and Economic Development Strategies -SEDS	HHS-ACF-ANA	Forecasted	10/23/2020	
FY2022 AmeriCorps State and National Grants	AC	Posted	9/14/2021	1/5/2022
Future Scholars for Science, Technology, Engineering, and Mathematics (STEM) Workforce Development Programs	DOD-AFRL-AFRLDET8	Posted	6/17/2020	6/17/2025
FY 2021 Competitive Funding Opportunity: Innovative Coordinated Access and Mobility Pilot Program	DOT-FTA	Posted	10/7/2021	12/6/2021

*Pennsylvania Governmental Grant Opportunities:*

The grants and financial aid information below is provided with the intent to help you begin the search, not an all-inclusive link to resources that may be available. To be contacted regarding future workforce development grant opportunities please send your email address to [ra-libwda-general@pa.gov](mailto:ra-libwda-general@pa.gov).

- Digital Literacy and Workforce Development Grant-Round 2:** The PA Department of Labor & Industry (L&I) announces the availability of \$1,530,000.00 in funding for the Digital Literacy and Workforce Development Grant (DLWDG) to include awards of up to \$45,000.00. This grant opportunity will be focused on supporting effective programs that enhance foundational digital literacy skills for job seekers in their local community. Foundational digital skills are necessary in carrying out job tasks and are becoming a main function of many jobs. **Applying organization must register with the State.**

- **Business Education Partnership (BEP) Grant:** The Pennsylvania Department of Labor & Industry (L&I) announces the availability of \$3.3 million of funding for the Business Education Partnership (BEP) Grant. The purpose is to solicit grant applications to implement BEP programs that allow school districts to collaborate with local business and local workforce development boards (LWDB) to educate students (future workforce), parents and guardians regarding high-priority occupations and career pathways. These programs create partnerships with educators, employers, parents/guardians, and students to provide career-related experiences, exposure to different workplace opportunities and knowledge regarding opportunities in the Commonwealth of Pennsylvania. *A partnership with a local school district is needed.*
- **PAsmart Apprenticeship Grants:** grant funds are used to support the growth of Registered Apprenticeship and Pre-Apprenticeship Programs, creating opportunities in new industries and occupations for Pennsylvania workers to advance along career pathways. This grant program will support schools, students, workers, and businesses across the Commonwealth and reach underrepresented populations, including women, minorities, individuals with disabilities, veterans, socio-economic disadvantaged individuals, individuals who speak English as a second language, individuals who were previously incarcerated, or individuals experiencing multiple barriers to employment. Ultimately, PAsmart will help Pennsylvanians develop the skills they need for the job they want, and in turn, support businesses by creating a skilled workforce to hire. *Applying organization must register with the State.*
- **State/Local Internship Program (SLIP):** Pennsylvania’s workforce development system must work with employers and other stakeholders to connect young people with high-quality work-based learning opportunities, paid work experiences and career pathways. Last year’s State/Local Internship Program, or SLIP, placed 1,130 16- to 24-year-old youth and young adults into internships at 657 worksites in a variety of industries. . *This is a supportive service that can be an incentive to potential employers. An application to become a worksite is needed.*

### *Private Funding*

Grant Station was used to identify potential funding resources with very limited success.

- **The Local Initiatives Support Corporation (LISC)** is a national organization and dedicated to helping community residents transform distressed neighborhoods into healthy and sustainable communities of choice and opportunity. *LISC’s primary area of interest is with Community Development Corporations.*
- **Lumina Foundation’s goal** is to increase the proportion of Americans with high-quality college degrees, certificates, and credentials to 60 percent by 2025. *However, The Foundation does not award grants to/for graduate-level or professional programs:*
- The **Charles Lafitte Foundation** provides support to nonprofit organizations throughout the United States for innovative and effective approaches to helping people help

themselves and others around them in order to achieve healthy, satisfying, and enriched lives. *A possibility but, additional information is needed.*

- The **EMCM Foundation** works to improve postsecondary outcomes for students from underserved backgrounds nationwide. The Foundation makes investments in Career Readiness aimed to improve postsecondary career and technical education (CTE) outcomes for students from underserved backgrounds. Grants are provided to programs and initiatives that build the capacity of institutions and organizations to provide accredited, credit-bearing, industry-informed and transferable postsecondary CTE pathways. Program-related investments are offered through the Education Innovation Ventures initiative. *A possibility but, additional information is needed.*
- The **Bridgestone Americas Trust Fund** supports local nonprofit organizations in the communities where the company has a presence, as well as selected national organizations. One of their three major categories in which contributions is adult education. Types of support include general operating and project support. *A possibility but, additional information is needed.*
- The **Herb Block Foundation** is committed to defending the basic freedoms guaranteed all Americans, combating all forms of discrimination and prejudice, and improving the conditions of the poor and underprivileged. The Foundation is also committed to providing educational opportunity to deserving students through post-secondary education scholarships and to promoting editorial cartooning through continued research.









Center for Health Services Education Training  
Initial Budget

<b>CHSET REVENUE</b>	<b>FY2021</b>	<b>FY2022</b>	<b>FY2023</b>	<b>FY2024</b>	<b>FY2025</b>	
CHSET Grants	\$ -	0	\$0	\$0	0	0
CHSET Tuition & Fees	\$ -		\$0	\$0	0	0
Continuing Education Fees		0	0	\$0	0	0
<b>Total Revenue</b>	<b>\$ -</b>	<b>0</b>	<b>\$0</b>	<b>\$0</b>	<b>0</b>	<b>0</b>
<b>CHSET COSTS</b>						
FT Staff						
PT Staff						
FT Staff Benefits						
Continuing Education Staff						
Office Supplies						
Ongoing Med. Equipment/Supplies						
Staff Development						
Renovation of # classrooms						
Renovation of # labs						
Initial Lab equipment						
Office Equipment						
Catering & Special Events						
Marketing & Advertising						
Mailing						
Licensing & fees						
Miscellaneous Expenses						
<b>Total Costs</b>		<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>NET REVENUE***</b>	<b>\$ -</b>	<b>0</b>	<b>\$0</b>	<b>\$0</b>	<b>0</b>	<b>0</b>

\* CAHE grants. In Its initial year, this amount accounts for grants totaling \$1million from the District of Columbia Government. In resulting years, those grant monies can be derived from a variety of public and private sources. In years 4 and 5 more grant monies will be applied for to facilitate the expansion of the CAHE into more training disciplines.

\*\* This amount represents 10 students enrolled in each of 3 year long programs and 10 students enrolled in two phlebotomy courses.

**It is important to note that the entire \$348,000 will not be collected in FY2006**, as renovations will take at least 3 months from the date grant monies are received. It is expected that the CAHE's programs will not begin until January 2006 at the earliest. It is expected that this will schedule will affect at least the first two years.

\*\*\* Net Revenue. As noted above, the program's start date will affect when net revenues are received. It is expected that SEU and GSCH will divide net revenue.