

San Francisco Bay Area Regional Prosperity Plan
Final Report Outline for Sub-Grantees

Dated: January 15, 2014

All sub-grantees must submit a final report at project close-out; a required deliverable included in all funding agreements. Sub-grantees must use the outline below to complete their reports. Sub-grantees must submit a draft Final Report to MTC for review at least one month before the end of the performance period of the sub-grant. The sub-grantee must submit a final version of the report, incorporating feedback from MTC, no later than one month after the performance period for the sub-grant ends. Please refer to the executed funding agreement for information on the performance period for your sub-grant.

Sub-grantees are also encouraged to share images from the project (in JPEG format) with MTC. These images may be submitted on a flash drive or compact disc.

A. Project Profile (1 page maximum)

Project Name:	Santa Clara County Health Services Workforce Collaborative
Lead and Partner Organizations:	Community Health Partnership, Working Partnership USA, Workforce Institute, work2future, Kaiser Permanente, San Jose City College, Hospital Council of Northern and Central California, SEIU Local 521, Santa Clara Valley Medical Center/Santa Clara Valley Health and Hospital System.
Primary Contact Person:	Angelica Diaz, Community Health Partnership, angelica@chpscc.org, 1401 Parkmoor Ave. Suite 200 San Jose, CA 95126
Sub-Grant Program:	Economic Prosperity
Project Type:	Title of Eligible Activity from Call for Proposals
Total Grant Amount:	\$150,000.00
Total Match (if any):	\$2,578.23
Geographic Coverage of Project:	Santa Clara County
Brief Description (150 words maximum):	This project will establish a Workforce Collaborative designed to unify efforts of healthcare providers, workforce development organizations, labor unions, community colleges and community based organizations in order to provide job search skills, career pathway information and focused training (including digital literacy) to low wage workers such as medical assistants, medical information clerks and similar non-clinical healthcare occupations.
Images:	Attach Separately in JPEG Format

B. Project Description (1 page maximum)

1. Goals and Objectives

The Santa Clara County Health Services Workforce Collaborative (Workforce Collaborative) was designed to unify efforts of healthcare providers, workforce development organizations, labor unions, community colleges and community based organizations in order to provide job search skills, career pathway information, and focused training to low wage workers in non-clinical health care occupations. The project expected to achieve providing an education and training opportunity to low to moderate (LMI) wage earning individuals, followed by facilitating the process to upward mobility. The mission of the Workforce Collaborative was to improve the efficiency and quality of the delivery of health care by offering workforce training and support to ensure that the health care workforce is ready to respond to the changing health care environment. The primary objectives were to:

- Meet the future workforce needs of the region's health care delivery system, emphasizing the new jobs, skills, and mandates associated with federal health reform.
- Assist low wage earning individuals, primarily those of disadvantaged backgrounds, enter career paths in health care.
- Assist non-clinical health care employers develop institutional career pathways for training and career ladders.

2. Work Plan

The key tasks and deliverables for the project included:

Tasks:

- a) A common language in describing the LMI non-clinical health care worker job specifications in Santa Clara County and the career steps in-between LMI and Middle Wage.
- b) A common understanding of the type of education and training required (including mentoring programs, internship, on the job work experience, and continuing education) to advance from LMI to middle-wage non-clinical health care jobs and the career steps between LMI and middle wage job classifications (including hiring and promotional processes).
- c) An Education and Training Program for advancement from LMI to middle wage non-clinical health care jobs, including the efficient and effective use of job search tools.

Outcomes:

- a) A crosswalk of LMI non-clinical health care worker job specifications, including job titles, scope of work, essential skills, minimum experience and requirements (including technology, cultural and linguistic skills, where necessary), hourly rates, benefits/no benefits.
- b) The Education and Training Program - including the hiring and promotional processes, internships, on the job work experience, and continuing education required for each career step that is needed for workers to meet the minimum requirements (including technology, cultural and linguistic skills, where necessary) for each step of the career ladder.
- c) A student satisfaction survey to measure the usefulness of the education and training program, what needs was met and was not met, and suggestions for improvement.
- d) Outreach strategy and application procedures for LMI workers (in whatever industry or sector) to enroll in the education and training programs.
- e) A knowledge data base of lessons learned and best practices from LMI workers, academics, employers, human resources and IT personnel, with regard to training programs, hiring and promotional policies and procedures, career ladders, and the job search website, which will be augmented through online satisfaction surveys, focus group discussions, and after hours conferences on related topics.

3. Role of Lead and Partners

Each partner played a significant role in the development and implementation of each grant deliverable. All partners participated in bi-weekly Collaborative meetings.

Bob Brownstein and Charisse LeBron, Working Partnerships USA – Assisted in the development of the Cross Walk of Non-Clinical Positions by conducting in-person interviews with local health care organization human resources representatives; assisted with the recruitment and assessment of Advisory Committee members; assisted with the outreach and recruitment of participants to the training program; developed the report on the potential replication of the Collaborative.

Carol Coen and Suzie Clark, Workforce Institute – Assisted in the development of the Cross Walk of Non-Clinical Positions by conducting in-person interviews with local health care organization human resources representatives and conducting data analysis on current open positions locally; assisted with the recruitment and assessment of Advisory Committee members; assisted with the outreach and recruitment of participants to the training program; developed the curriculum, hired instructors, and coordinated implementation of the program.

Dann Bergman, work2future – Assisted in the development of the Cross Walk of Non-Clinical Positions; assisted with the recruitment and assessment of Advisory Committee members; assisted with the outreach and recruitment of participants to the training program.

Darcie Green and Hanh Nguyen, Kaiser Permanente - Assisted in the development of the Cross Walk of Non-Clinical Positions; assisted with the recruitment and assessment of Advisory Committee members; assisted with the outreach and recruitment of participants to the training program; developed an internship program for student graduating from the training course.

Ingrid Thompson, San Jose City College - Assisted with the recruitment and assessment of Advisory Committee members; assisted with the outreach and recruitment of participants to the training program.

Jo Coffaro, Hospital Council of Northern and Central California – Assisted in the development of the Cross Walk of Non-Clinical Positions; assisted with the outreach and recruitment of participants to the training program.

Robert Li, SEIU Local 521 – Assisted in the development of the Cross Walk of Non-Clinical Positions; assisted with the recruitment and assessment of Advisory Committee members; assisted with the outreach and recruitment of participants to the training program.

Trudy Johnson, Santa Clara Valley Medical Center - Assisted in the development of the Cross Walk of Non-Clinical Positions by conducting data analysis on current positions; assisted with the recruitment and assessment of Advisory Committee members; assisted with the outreach and recruitment of participants to the training program; assisted with the internship and exposing students to professionals in the field.

C. Challenges and Outcomes (1 page maximum)

4. Challenges/Outcomes

Describe the main challenges faced of implementing the project. How did your team address them? Describe what worked well and what did not work. What would you have done differently if you could start over?

The main challenge was conducting the economic research to understand the industries with job growth and the demographics of the work force in the Bay Area, as well as soliciting input from local hospitals and community clinics to identify key healthcare workforce needs in the county. The team overcame the challenge by using an online platform to understand the current job market in LMI earning position in the health industry by conducting data analysis on skills, qualification, and educational attainment required. What could have been done differently is holding a kick off meeting by inviting local health care employers to present the project as well as leveraging meeting time with the Santa Clara County Health Reform Stakeholders committee, where the idea of the Workforce Collaborative originated from.

5. Outcomes

Describe key outcomes, achievements, successes, deliverables, findings and/or lessons learned for the project. Describe who benefited from this project (may be individuals, groups or organizations) and how.

Based on the economic research and the employer and employee input, the collaborative identified that nonclinical roles were among those growing in the health care industry and were accessible to underserved communities of color with limited education.

The Collaborative then successfully developed a crosswalk to determine currently vacant nonclinical healthcare workforce positions and the position qualifications needed to begin developing a career advancement education module. The module began to address the gaps in the skills needed in the non-clinical workforce staff—those who have limited interaction with patients—to allow them to take on a higher role in the future.

In collaboration with the Workforce Institute, a ten module training course (88 hours) was developed, in which students acquired the skills needed to advance their career. This training module included lessons on patient navigation, the Affordable Care Act, medical terminology, and digital literacy. It also included training on resume writing, interview skills, and customer service skills to equip students with the tools to apply for nonclinical higher positions. In addition, the training module also included job shadowing and internship opportunities that provided students with real experience to add to their skill set.

The training sessions were extremely successful and had over 100 individuals on the waiting list. The feedback from students has been positive, and students are indicating that they are learning what is needed to feel confident to apply for positions to advance their career. The collaborative will be conducting a formal evaluation post-training to get feedback on what students have done with their education.

D. Replicability and Dissemination (1 page maximum)

6. Replicability

This project was established to strengthen career pathways to middle-wage jobs, improve conditions for workers in lower-wage jobs, and to meet the needs of the health care field in the county. Establishing the training module that teaches the skills necessary for lower-wage non-clinical workers will allow them to take broader and more advanced roles within their organization and possibly expand to include outreaching to the clinical workforce in the health care field. This will meet the needs of both the employees and employers, and the broader healthcare needs of the County are well served.

7. Tools and Resources

Curriculum and cross walk of non-clinical health care occupations, including summary of advance skill set required. Material attached.

8. Sharing and Dissemination

This training module will be best utilized in other counties that are looking for a stronger workforce but may not currently have the tools to equip their current staff with additional skills needed. By engaging their workforce, and supporting them through these training modules, organizations are able to invest in their employees to build skills, while building a career pathway for their staff to advance in the organization.

The tool employed also be utilized in other non-healthcare sectors with individuals who are working in lower-wage jobs, and are unable to move up the career pathway due to lack of skills or education. By providing this type of training program, students are able to learn the skills needed to gain confidence to apply for a higher-level position and to better utilize their skills to serve at a higher capacity.

E. Recommendations and Next Steps (1 page maximum)

9. Recommendations

- 1) Work with labor unions and academic institutions to continuously modify curriculum based on the changing health care environment.
- 2) Conduct a local workforce training needs assessment.
- 3) Establish a worker advisory committee to provide input to workforce needs.
- 4) Adopt curriculum as part of trainings delivered by employers.
- 5) Develop a post assessment to identify impact.
- 6) Develop partnership with local health care organization to offer internship opportunities.

10. Next Steps

The next steps for the project are to modify the curriculum and develop continued series of trainings. Fund development is in process to sustain this program.



Santa Clara County Health Services Workforce Collaborative: Summary of Non-Clinical Job Description Matrix

Definition of Non-Clinical Occupation: “Non-Clinical” means not dealing with patient care or management including testing. Examples of non-clinical jobs include medical coders, billers, receptionists, etc. These roles may involve interaction with patients but no direct care to the patient is involved. Clinical jobs include treating patients or direct patient care of any type (*San Jose City College*).

Assumptions:

- Without Benefits (exclude from hourly rate)
- Full-time (100% FTE., 40 hours per week)
- Non-exempt (Hourly)
- Rate: \$13 - \$18 per hour (\$27,040 - \$34,440 annualized)

Job Titles:

- | | |
|--|-------------------------------------|
| ▪ Application Assistant/Outreach and Enrollment Specialist | ▪ Legal Process Clerk |
| ▪ Billing Specialist/Clerk | ▪ Medical Records Technician |
| ▪ Case Manager (Social Worker) | ▪ Optical Assistant |
| ▪ Front Desk Staff | ▪ Perinatal Service Worker |
| ▪ Support Service Assistant | ▪ Pharmacy Technician/Assistant |
| ▪ Health Information Clerk | ▪ Radiology Technician |
| | ▪ Referral/Patient Care Coordinator |

Job Title Description:

Under supervision, provide a variety of clerical services and a wide range of office support for department staff, assisting with the indirect care of patients, and working on assignments that require exercising independent judgment and taking initiative.

Skills:

- Knowledge and familiarity with basic patient care and patient assistance.
- Ability to perform general clerical tasks: efficient use of computer keyboard (45-50 wpm), screening phone calls, organizing and filing, appointment scheduling and management, electronic medical record keeping.
- Ability to use computer operations: word processor, spreadsheet, PowerPoint, databases, email, etc.
- Recognize alphanumeric characters in order to organize data and operate data entry equipment.
- Ability to speak, read, write, and understand English effectively at a level appropriate for the job.
- Understand and apply basic concepts of patient confidentiality, privacy, security, and release of patient information.
- Understand and apply medical terminology.
- Understand and apply basic mathematics.
- Understand and apply ICD-9CM and CPT-4 Coding.

- Ability to communicate effectively and courteously with staff and patients, taking into consideration age, culture, and developmental needs.
- Familiarity with materials and equipment directly used: cardiac monitoring equipment, patient carts, hospital beds, wheelchairs, phone and intercom systems, computers, copy machines, fax machines.
- Familiarity with vital sign measurement.

Qualifications:

- High School Diploma or GED equivalent.
- 1 to 2 years related work experience.
- Hospital and/or Medical experience highly desired.
- Graduate of accredited Medical Assisting program and/or equivalent.

Tasks

- Operate alphanumeric data entry equipment for recording and verifying information from source documents.
- Obtain, sort, check, file, prepare, copy, create, update, distribute, and record medical information according to departmental instruction or procedures.
- Answer phones and route phone calls appropriately including answering inquiries about routine procedures and policies and routes staff and visitors to appropriate departments or areas.
- Operate office equipment such as phones, computers, fax machines, copiers, patient information and management systems and other modern standard medical office equipment, and perform basic maintenance operations such as changing toner cartridges or printer ribbons
- Perform in house and campus courier duties.
- Release appropriate patient information according to currently applicable State and Federal regulations.
- Assist providers by performing greetings and identifying patients; escorting patients to exam rooms; identifying purpose of visit; preparing patient for office visit such as weighing patient, taking vital signs, performing minor medical procedures and other tasks associated with patient care.
- Obtain authorizations from clients and insurance carriers for treatments as prescribed by physicians.
- Obtain authorizations for patient referrals to specialists, diagnostic testing and surgeries; maintain records of all referrals and complete monthly reports.
- Make appointments for patients, notify patients of appointments, contact patients who miss appointments and/or report missed appointments to employer.
- Maintain clinical/office supply levels and complete supply orders as needed.
- Collect co-payments, co-insurance and deductibles and issue receipts; manage cashier box and daily deposits according to company policies.

Santa Clara County Health Service Workforce Collaborative

Certificate Training Course Schedule

SESSION 2

January 2015						
S	M	T	W	R	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

January 17
Patient Navigation, HIPPA, ACA

February 2015						
S	M	T	W	R	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

February 3, *7, 10, *14, 17, 24
Medical Terminology

February 5, 12, 19, 21, 26
Digital Literacy & Resume Writing

February 28
Linked-in & Cross Platform

March 2015						
S	M	T	W	R	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
1	2	3	4	5	6	7

March 7
Interviewing Skills

March 3, 5, 14, *21
Customer Service

March 24, 26
Stress Relief/Graduation

SESSION 3

February 2015						
S	M	T	W	R	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

February 7
Orientation, Computer Assessment

February 9, 11, 14, 16, 18
Digital Literacy & Resume Writing

February 23, 25
Customer Service

March 2015						
S	M	T	W	R	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

February 21
LinkedIn & Cross Platform

March 2, 4, 9, 11, 16, 18, 23
Medical Terminology

March 7
Stress Relief

March 14
Patient Navigation, HIPPA, ACA

March 21
Customer Service

March 28
Interviewing/Graduation

Time Schedule: Evening classes, 6:00pm – 9:00pm | Saturday Classes, 8:30am – 5pm and (*) 8:30-12pm

Santa Clara County Health Services Workforce Collaborative: *Report on Replication of Project*

The Workforce Collaborative, a partnership of workforce boards, community clinics, and hospitals, worked together with the goal to strengthen career pathways to middle wage jobs. The Collaborative successfully identified critical workforce needs in the county and created and implemented an employer-informed skills-building program/mechanism that will successfully support the career advancement of Santa Clara County's lower-wage nonclinical healthcare workers.

The Collaborative began by establishing a local strategy to address the workforce needs in the county. This involved conducting economic research to understand the industries with job growth and the demographics of the work force in the Bay Area, as well as soliciting input from local hospitals and community clinics to identify key healthcare workforce needs in the county.

The collaborative created an Advisory Committee of members from low-moderate earning wage positions, to get input on the employee challenges to career advancement, including lack of job announcements and lack of access to training and educational skills to qualify for higher positions. Many felt that employers lacked a clear process by which nonclinical healthcare workers are encouraged or supported to gain new skills and seek career advancement opportunities within the hospitals and clinics.

Based on the economic research and the employer and employee input, the collaborative identified that nonclinical roles were among those growing in the health care industry and were accessible to underserved communities of color with limited education.

The Collaborative then successfully developed a crosswalk to determine currently vacant nonclinical healthcare workforce positions and the position qualifications needed to begin developing a career advancement education module. The module began to address the gaps in the skills needed in the non-clinical workforce staff—those who have limited interaction with patients—to allow them to take on a higher role in the future.

In collaboration with the Workforce Institute, a ten module training course (88 hours) was developed, in which students acquired the skills needed to advance their career. This training module included lessons on patient navigation, the Affordable Care Act, medical terminology, and digital literacy. It also included training on resume writing, interview skills, and customer service skills to equip students with the tools to apply for nonclinical higher positions. In addition, the training module also included job shadowing and internship opportunities that provided students with real experience to add to their skill set.

The training sessions were extremely successful and had over 100 individuals on the waiting list. The feedback from students has been positive, and students are indicating that they are learning what is needed to feel confident to apply for positions to advance their career. The collaborative will be conducting a formal evaluation post-training to get feedback on what students have done with their education.

This project was established to strengthen career pathways to middle-wage jobs, improve conditions for workers in lower-wage jobs, and to meet the needs of the health care field in the county. Establishing the training module that teaches the skills necessary for lower-wage non-clinical workers will allow them to take a broader and more advanced roles within their organization and possibly expand to include outreaching to the clinical workforce in the health care field. This will meet the needs of both the employees and employers, and the broader healthcare needs of the County are well served.

This training module will be best utilized in other counties that are looking for a stronger workforce but may not currently have the tools to equip their current staff with additional skills needed. By engaging their workforce, and supporting them through these training modules, organizations are able to invest in their employees to build skills, while building a career pathway for their staff to advance in the organization.

The tool employed also be utilized in other non-healthcare sectors with individuals who are working in lower-wage jobs, and are unable to move up the career pathway due to lack of skills or education. By providing this type of training program, students are able to learn the skills needed to gain confidence to apply for a higher-level position and to better utilize their skills to serve at a higher capacity.