



BEN HUDNALL MEMORIAL TRUST

2013 Annual Report

BEN HUDNALL MEMORIAL TRUST

WHAT IS IT?

Established in 2007, the Ben Hudnall Memorial Trust provides skill development for upward mobility and job enhancement to represented employees across all Kaiser Permanente regions. Named after Ben Hudnall, a tireless advocate for Kaiser Permanente's Labor Management Partnership, the Trust supports training that aligns participant career mobility with KP workforce strategies.

HOW IS IT FUNDED?

Each year Kaiser Permanente, as part of the National Agreement, funds two Taft-Hartley education trusts: the Ben Hudnall Memorial Trust and the SEIU-UHW West & Joint Employer Education Fund. These trusts help represented Kaiser Permanente employees, who are part of the Coalition of KP Unions, pursue training and education opportunities.

WHO CAN PARTICIPATE?

International Brotherhood of Teamsters

International Federation of Professional and Technical Engineers

International Longshore and Warehouse Union

Hawai'i Nurses' Association

Kaiser Permanente Nurse Anesthetists Association

Office and Professional Employees International Union

Oregon Federation of Nurses and Health Professionals

Oregon Nurses Association

United Food and Commercial Workers International Union

United Nurses Associations of California/Union of Health Care Professionals

United Steelworkers International Union

BHMT OFFERINGS

INDIVIDUAL STIPEND PROGRAM

The Trust stipend is replacement income paid directly from the Trust to qualified participants. Stipend pay is available for up to 8 hours per week of classwork or study time with a lifetime maximum benefit of \$16,000 per participant. This program supports students pursuing academic degrees at institutions of their own choosing. Program participants must have manager approval to decrease their normal work schedules, and all applications must be approved by the Regional Workforce Planning & Development Team.

REGIONAL TRAINING PROGRAMS

Regional Training Programs offer cohort training for targeted needs within each of Kaiser Permanente's regions in the areas of career preparation services and/or course prerequisites, nurse education, professional/technical education, career upgrades and customized training. These popular programs have a 95% completion rate as compared to the average 50% completion rate in California colleges.

CAREER COUNSELING

The Career Counselors are an integral part of the Trust's fundamental support system for its participants. Through individual appointments, workshops, career fairs, and webinars, the Trust Career Counselors are available to all Trust-eligible employees to:

- Help guide employees to a new career direction or to thrive within their current career.
- Partner with employees to find appropriate career options within Kaiser Permanente.
- Create individual development plans that incorporate internal and external resources for tuition reimbursement, training, and education.
- Help eliminate roadblocks to career resiliency.
- Help identify financial, academic, and emotional support employees need to successfully move to the next level in their careers.

ACADEMIC ADVISING

Ed Assist (a Bright Horizons company) offers participants academic advising and academic financial advising services. Ed Assist complements BHMT's existing Career Counseling services by:

- Working with clients to determine which academic institutions best meet their needs based on chosen program, cost comparison, and preferred learning style.
- Providing prior academic assessments and financial advising to help develop an overall education plan unique to each individual's strategy for successful program completion.

BHMT OFFERINGS

BEN 'U'

Ben 'U' is a series of flexible web-based programs and courses provided by the Trust's network of contracted educational providers. The program is designed to reduce or eliminate barriers adult learners may face by providing career mobility training and life-enriching education, as well as:

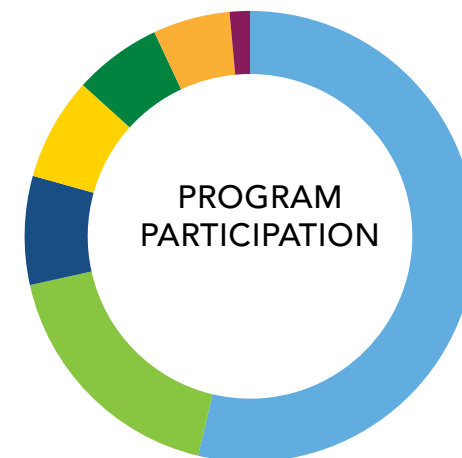
- Skill building/college preparatory classes that help employees be successful in their current jobs or set them on course to a new one.
- College level courses that are prerequisites and lab courses for a variety of Allied Health and Nursing programs. These courses are generally impacted at local schools and hinder employees from embarking on their desired career paths.

SKILLSOFT/e-LEARNING LIBRARY

Delivered through the KP Learn/SkillSoft platform, the Trust's e-Learning Library provides its participants with access to over 1,000 business skills and desktop application courses ranging from 10-minute task-specific courses, to broader 1-hour training opportunities. A new library of 800 3-5 minute long videos covering a variety of desktop and handheld device topics launched in September 2013.

CE DIRECT

CE Direct offers more than 700 continuing education courses in every clinical area of Nursing and Allied Health as well as Pearls Review with 900+ hours of online certification test-prep material to help nurses prepare and pass their exams for more than 70 different certifications. Additionally, BHMT participants have access to the Online Clinical Textbook which provides an in-depth view of 650+ clinical topics, covering 98% of the conditions nurses see at the bedside.



DEMOGRAPHICS

TOTAL ELIGIBLE

44,958

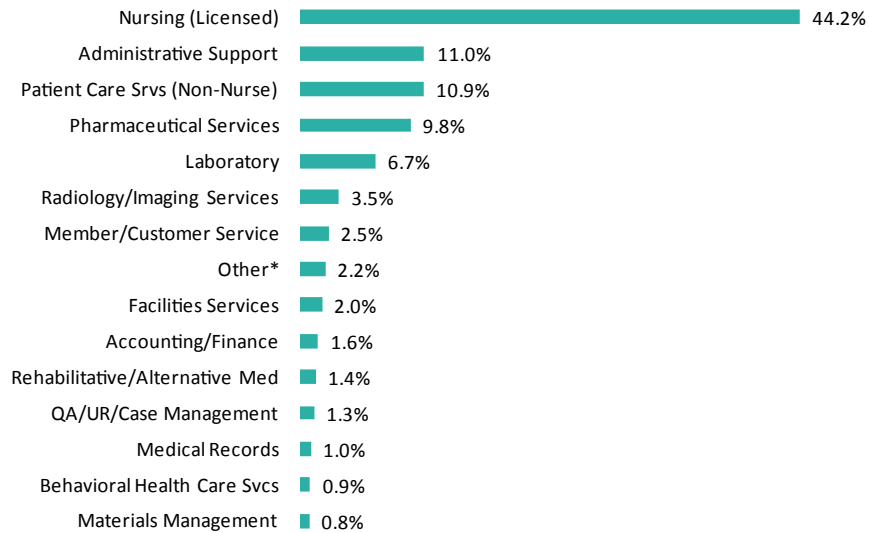
% OF TOTAL KP WORKFORCE

26%

UNIONS BY REGION

CO	UFCW				
GA	UFCW				
HI	HNA				
MAS	OPEIU	UFCW			
NCAL	IFPTE	OPEIU			
NW	ILWU	OFNHP	ONA	UFCW	
SCAL	IBT	KPNAA	OPEIU	UFCW	UNAC/UHCP USWA

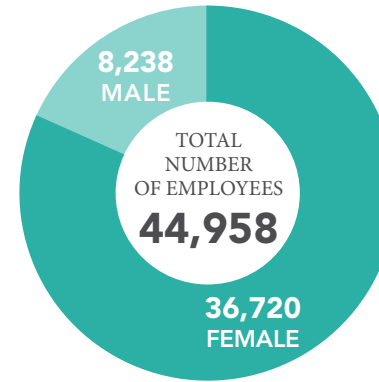
Job Family of BHMT Eligible Employees



* Communication Arts & Production, Consulting Services, Continuing Care, Dental, Education/Training, Health Care Operations, Human Resources, Information Technology, Insurance, Legal, Library Sciences, Nutrition/Food Services, Research & Development, Sales & Marketing

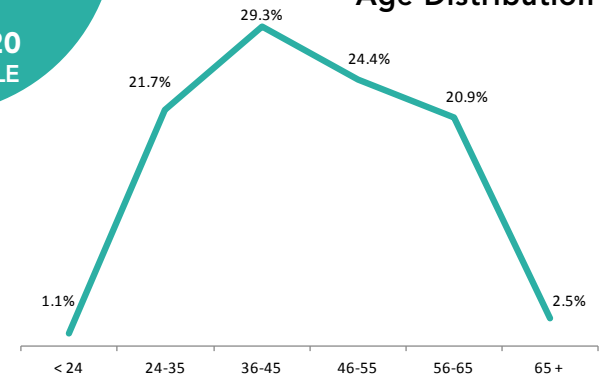
DEMOGRAPHICS

Male vs. Female

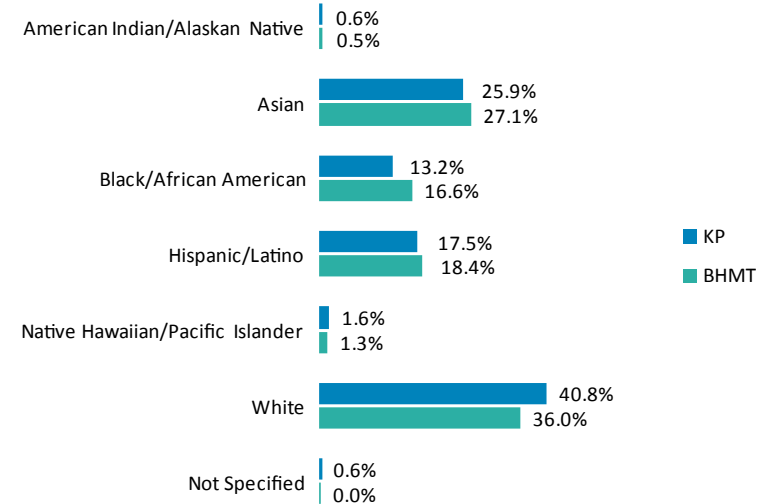


The Trust population is representative of the larger KP population making Trust programs the perfect opportunity to pilot concepts that can be scaled up throughout KP.

Age Distribution



Ethnicity



PARTICIPATION HISTORY

Program Participants

	2007	2008	2009	2010	2011	2012
Individual Stipends	96	416	527	555	678	872
Regional Training Programs	214	497	745	750	1231	1573
# of Programs	6	22	36	36	63	66
Career Counseling	1072	2482	2588	2917	2630	2642
CE Direct				4015	7406	7979
Ben 'U'				171	488	2553
TOTAL PARTICIPANTS	1382	3395	3860	8408	12433	15619

↑ 146% 14% 118% 48% 10%
GROWTH OVER PREVIOUS YEAR

“This program definitely helped me with reaching my educational goals. Thanks for offering such a phenomenal program for those who are seeking to advance his or her career.”
– RN, SCAL

2013 STRATEGY

IT'S ALL ABOUT INTEGRATION

KEY INITIATIVES



CAREER COUNSELING

Integration of Career Counseling services to further enhance the support infrastructure available to the Individual Stipend and Regional Training Program (RTP) participants.



CROSS PROGRAM LINKAGE

Integration of cross referencing Individual Stipend pipeline data into the Regional Training Program approval process and increase number of people accessing more than one Trust program.



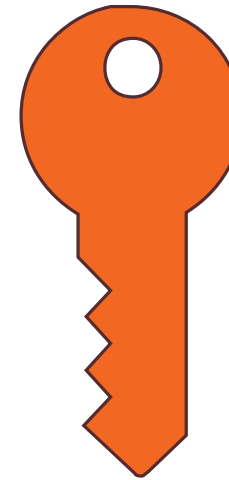
BEST PRACTICES

Integration of lessons learned / best practices from previously completed programs into new program infrastructure.



COMPLETE EDUCATIONAL OVERVIEW

Integration of participant payment history into KP Retriever reporting tool providing participants access to their complete educational assistance overview.



2013 RESULTS (Participation)

Program Type

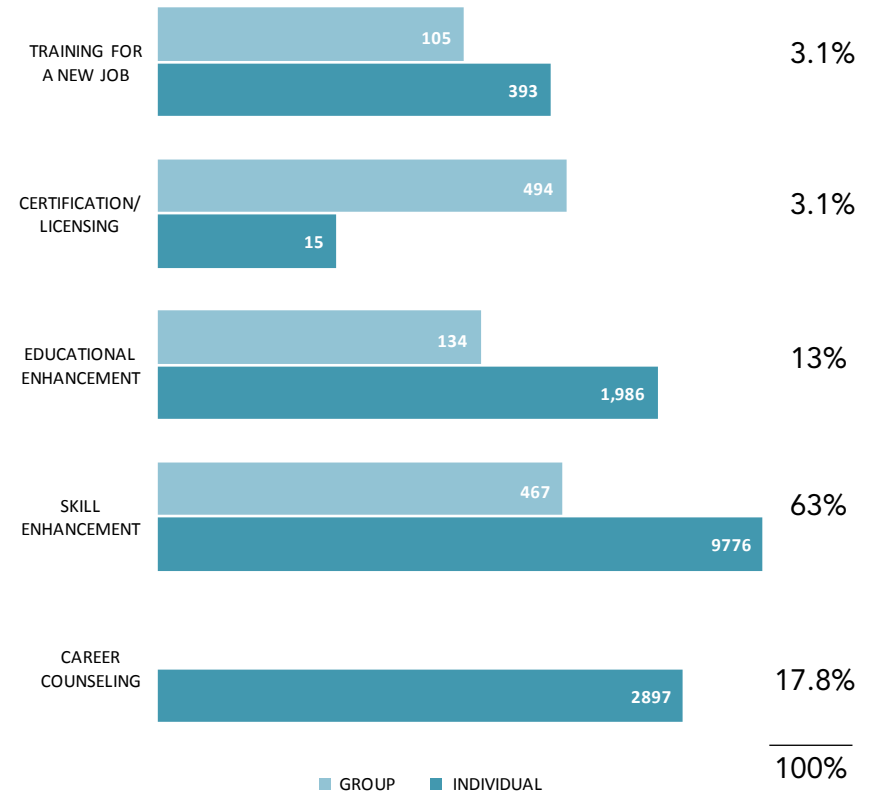
2012		2013
872	Individual Stipends	897
1573 66	Regional Training Programs # of Programs	1200 56
2642	Career Counseling	2897
	Academic Advising	236
7979	CE Direct ASRT	8728 15
1788	Ben 'U'	1267
765	e-Learning Library	1027
15619	TOTAL PARTICIPANTS	16267
28.5%	TRUST UTILIZATION	26.5%
42615	BHMT eligible	44958
12148	unique participants	11927

People who accessed
MORE THAN ONE
Trust service
INCREASED
from **469**
to **3728**



2013 RESULTS (Participation)

Program Intent



15,067 INDIVIDUALS | **16,267** TOTAL PARTICIPANTS
1,200 GROUP



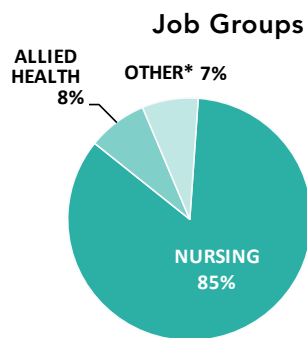
INDIVIDUAL STIPEND PROGRAM

The Trust stipend is replacement income paid directly from the Trust to qualified participants. Stipend pay is available for up to 8 hours per week of class work or study time, with a lifetime maximum benefit of \$16,000 per participant. This program supports students pursuing academic degrees at institutions of their own choosing. Program participants must have manager approval to decrease their normal work schedules, and all applications must be approved by the Regional Workforce Planning & Development Team.

Participants

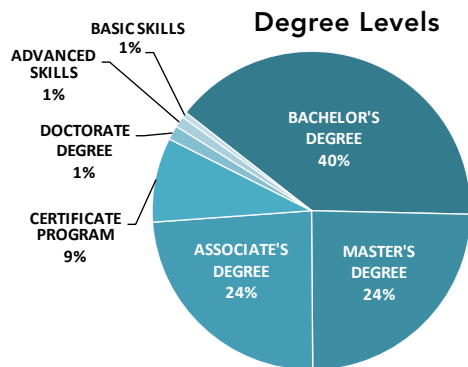
	Total # of Participants	New in 2013
NCAL	22	10
SCAL	618	267
CO	37	13
GA	73	39
HI	8	5
MAS	64	27
NW	53	24
OH	22	3
ALL REGIONS	897	388

41.1% of total expenses
↑ 13.3% increase from 2012



EXAMPLES OF JOB GROUPS IN OTHER*

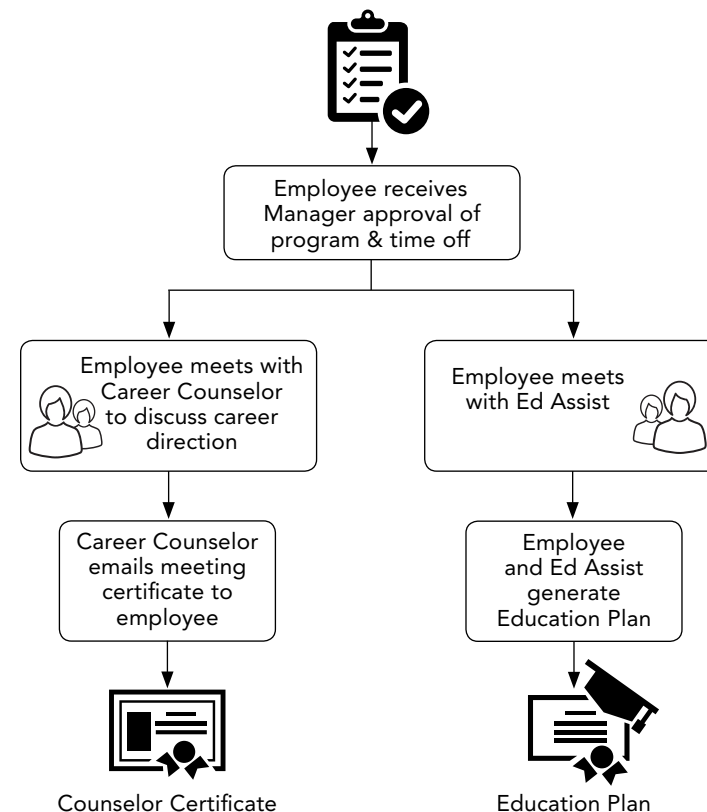
- Business/Accounting Administration
- Community/Public Health
- General Sciences



INDIVIDUAL STIPEND PROGRAM

BEFORE YOU APPLY

PLAN



To learn more about our program visit: www.bhmt.org/stipend

“Using the stipend benefit was greatest thing I ever had. I was able to spend my time reading and doing my school assignments.”

– RN, SCAL

REGIONAL TRAINING PROGRAMS

Regional Training Programs offer cohort training for targeted needs within each of Kaiser Permanente's regions in the areas of career preparation services and/or course prerequisites, nurse education, professional/technical education, career upgrades and customized training. These popular programs have a 95% completion rate as compared to the average 50% completion rate in California colleges.

Participants

	# of Participants	# of Programs
NCAL	277	5
SCAL	394	16
CO	77	4
GA	19	3
HI	149	2
MAS	116	14
NW	168	12
OH	0	0
ALL REGIONS	1200	56

23.1%
of total expenses

↓ 26%
decrease from 2012

EXAMPLES OF PROGRAMS

NURSING

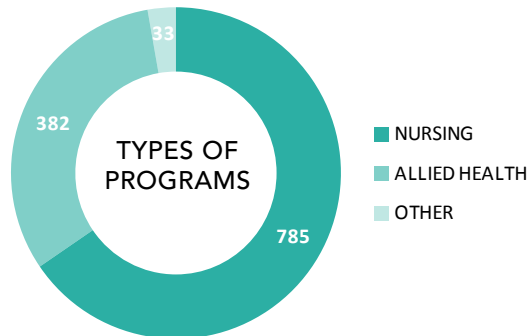
- RN to BSN Pilot
- Nurses Improving Care of Healthsystem Elders (NICHE) Training
- Wound Care Certification
- RN Transition to Practice
- Lactation Consultant

ALLIED HEALTH

- CLS Certification Review
- Pharmacy Specialty Certification
- Imaging Cross Training
- Certified Ophthalmic Assistant
- Dialectical Behavior Therapy

OTHER

- Extraordinary Administrative Assistant



REGIONAL TRAINING PROGRAMS



139
PROGRAMS
COMPLETED



4771
UNIQUE
PARTICIPANTS
COMPLETED

DO YOU HAVE A TRAINING NEED?

All applications for Regional Training Programs must be approved by your Regional Workforce Planning and Development Committee prior to Trust approval and funding. Contact your Regional Labor and/or Management Chair for more information.

“Thanks for giving me the opportunity and support to finish my Bachelor’s Degree in Nursing. I very much appreciate all the cooperation that went into this, and the program that was offered through Ben Hudnall Memorial Trust and Kaiser Permanente! It was great to surprise my family with my Bachelors (I didn’t tell them until I graduated).”

– RN, HI

CAREER COUNSELING

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- Help guide employees to new career direction or to thrive within their current career.
- Partner with employees to find appropriate career options within Kaiser Permanente.
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- Help eliminate roadblocks to career resiliency.
- Help identify financial, academic and emotional support employees need to successfully move to the next level in their careers.

Individual Client Sessions

	Initial	Follow-up	TOTAL
NCAL	83	278	361
SCAL	305	409	714
CO	44	148	192
GA	157	412	569
HI	52	45	97
MAS	207	296	503
NW	61	158	219
OH	33	209	242
ALL REGIONS	942	1955	2897

18.2%
of total
expenses

↑ 5.4%
increase
from 2012

17,228
INDIVIDUAL
SESSIONS
SINCE
PROGRAM
INCEPTION!

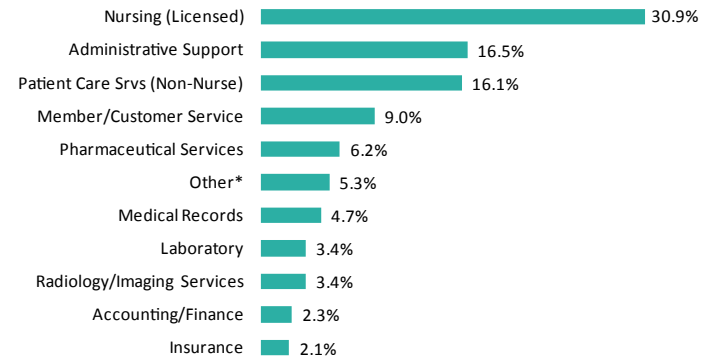


In addition to Individual Sessions our Career Counselors offer a variety of services including these popular workshops and webinars:

- Exploring and Creating Your Future Career at KP
- Handling Change Successfully
- Professional Communication
- Got Job Stress?
- Time Management in School
- Work/Life Balance

CAREER COUNSELING

Client Job Families



*Behavioral Health Care Services, Continuing Care, Dental, Education/Training, Facilities Services, Health Care Operations, Information Technology, Materials Management, Nutrition/Food Services, QA/UR/Case Management, Rehabilitative/Alternative Medicine

Academic Advising

Ed Assist (a *Bright Horizons* company) offers participants academic advising and academic financial advising services. Ed Assist complements BHMT's existing Career Counseling services by:

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	Clients (unique)
NCAL	7
SCAL	150
CO	10
GA	31
HI	3
MAS	20
NW	15
OH	0
TOTAL	236

Ben 'U' is a series of flexible web-based programs and courses provided by the Trust's network of contracted educational providers (*meets BHMT criteria standards*). The program is designed to reduce or eliminate barriers adult learners may face by providing career mobility training and life-enriching education, as well as:

- Skill building/college preparatory classes that help employees be successful in their current jobs or set them on course to a new one.
- College level courses that are prerequisites and lab courses for a variety of Allied Health and Nursing programs. These courses are generally impacted at local schools and hinder employees from embarking on their desired career paths.

Ben 'U' Enrollments

College Preparatory/Introductory Courses	566	11.3% of total expenses
College Prerequisites/General Education	701	
Skill Enhancement	1027	
TOTAL 2294		↑ 10.3% increase from 2012

In 2014, Ben 'U' will launch 3 new college preparatory courses, and 4 more college prerequisite courses to complement and expand its current offerings:

- Intro to Biology
- Anatomy & Physiology II with Lab
- Intro to Chemistry
- Principles of Biology
- IT 101 - Basic IT Applications
- Microbiology with Lab
- Chemistry with Lab

Ben 'U' Enrollments by Class

	NC	SC	CO	GA	HI	MA	NW	OH	TOTAL
COLLEGE PREP/INTRO									
College Gateway	9	83	-	24	1	47	11	4	179
Intro to Med Term	31	103	-	35	1	54	5	1	230
Intro to Anatomy/ Physiology	7	36	1	5	-	10	3	-	62
Intro to Algebra	3	13	1	5	-	13	2	2	39
Algebra, Elementary	6	22	-	11	-	12	2	3	56
COLLEGE PREREQS/GEN ED									
Algebra, Intermediate	7	26	2	7	-	13	2	2	59
Statistics	2	14	-	5	-	6	6	-	33
Spreadsheet Apps	1	18	2	9	-	6	3	2	41
English A	10	54	-	6	-	23	4	2	99
English B	5	39	-	11	-	20	5	2	82
Psychology 101	5	37	-	8	-	16	3	3	72
Psychology, Developmental	5	35	-	9	-	12	3	4	68
Sociology	3	28	-	13	-	16	3	3	66
College Med Term	8	34	1	20	-	21	2	6	92
Anatomy & Physiology I with lab	2	72	-	8	-	4	-	-	86
Philosophy 110 (Critical Thinking)		3							3
SKILL ENHANCEMENT									
Skillssoft/ e-Learning Library	146	347	56	85	11	234	113	35	1,027
TOTAL 250 964 63 261 13 507 167 69 2,294									

“I really enjoyed taking this course. The information was well presented and I felt encouraged throughout the course even though it was online.” – **Member Services Associate, GA**

SKILLSOFT/e-LEARNING LIBRARY

Delivered through the KP Learn/SkillSoft platform, the Trust's e-Learning Library provides its participants with access to over 1,000 business skills and desktop application courses ranging from 10-minute task-specific courses, to broader one-hour training opportunities. A new library of 800 3-5 minute long videos covering a variety of desktop and handheld device topics launched in September 2013.

	Participants	Courses
NCAL	146	574
SCAL	347	797
CO	56	122
GA	85	238
HI	11	24
MAS	234	926
NW	113	310
OH	35	67
TOTAL	1027	3058

Skillsoft/e-Learning Library courses were delivered at an average \$6.75 per course taken in 2013.



“This is an organization that opens up the world to you if you want to further your education. I was able to access all of these courses for free in the e-Learning Library through the Ben Hudnall program. You can pace yourself and repeat a course until you understand the material online.”

– Courier, SCAL

CE DIRECT & ASRT

CE Direct offers more than 700 continuing education courses in every clinical area of Nursing and Allied Health as well as Pearls Review with 900+ hours of online certification test-prep material to help nurses prepare and pass their exams for more than 70 different certifications. Additionally, BHMT participants have access to the Online Clinical Textbook which provides an in-depth view of 650+ clinical topics, covering 98% of the conditions nurses see at the bedside.

	Participants	Courses	Contact Hrs.
NCAL	21	22	51
SCAL	6520	16870	55792
CO	161	349	699
GA	344	97	165
HI	662	225	370
MAS	307	543	1037
NW	702	2614	7768
OH	11	0	0
TOTAL	8728	20720	65881

In 2013, the Trust delivered Continuing Education to its participants at \$4.11 per contact hour.



Since the program began, the Trust has delivered a total of 74,857 classes, and 204,082 contact hours at an average \$3.74 per successfully completed contact hour.

ASRT

The Trust augmented its continuing education offerings available to its imaging professionals by launching a new provider partnership with the American Society of Radiologic Technologists in July 2013. Under this program, BHMT participants can choose up to 10 credit hours of training per year from ASRT's full catalog of offerings at to no out-of-pocket expense to the participant.

	Participants	Courses	Contact Hrs.
NCAL	0	0	0
SCAL	2	4	12
CO	0	0	0
GA	2	11	20
HI	0	0	0
MAS	5	32	50
NW	3	12	30
OH	3	22	30
TOTAL	15	81	142

BRAND NEW PROGRAM
introduced to BHMT in Fall 2013!



2014 STRATEGY

35% UTILIZATION OF TRUST SERVICES

3 STRATEGIC AREAS OF FOCUS

EXISTING PROGRAMS

- Assess what we have.
- Diversify where there is need and opportunity.

CAREER COUNSELING

- Develop Career Resiliency Model.

NEW PROGRAMS

- Diversify types of programs to meet needs.
- Multi-Regional Training Programs (MRTPs) Degree Completion
- Business Certification Programs
- National Bi-Lingual Programs



Courtesy of LMP Communications

DONNA FRASER, RN

She has worked her way up the career ladder, with four promotions in 21 years, thanks in part to the Ben Hudnall Memorial Trust and the Labor Management Partnership.

TRUSTEES



Clockwise from top left:

DENNIS DABNEY
Senior Vice President
National Labor Relations
Kaiser Permanente

KEN DEITZ
President
UNAC/UHCP

JIM PRUITT
Vice President
LMP & Labor Relations
The Permanente Federation

HAL RUDDICK
Executive Director
Coalition of Kaiser Permanente Unions

ROBERT SACHS
Vice President
National Learning and Development
Kaiser Permanente

KEVIN WILLIAMSON
International Vice President and
Special Assistant to the President
UFCW International Union

BHMT STAFF

CO-DIRECTORS

Jessica Butz
Laura Long

STAFF

Rapheal Gavin
Sasha Naborne
Andrea Rahner
Tom Rauch
Koy Saechao
Tracy Truong
Lynda Wagner

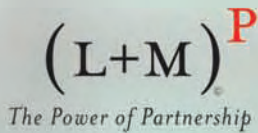
CAREER COUNSELORS

Jan Cummings
Michele DeRosa
Martha Edwards
Beverly Garcia
Dee Holl
Beth Levin
Jeannette Maass
Darlene Martin
Michele McCarthy
Tina Nguyen
David Rosenberg
Mary Van Hee
Richard Vicenzi
Mary Wiggins

WHO ARE THE BHMT TRUSTEES?

BEN HUDNALL MEMORIAL TRUST

The Ben Hudnall Memorial Trust, part of our National Agreement negotiated in 2005, supports continuing education of its participants across KP. Ben Hudnall was a tireless advocate for organized labor and Kaiser Permanente's Labor Management Partnership. Ben was an unwavering supporter of education and career advancement. The Trust was named in his honor to further acknowledge his dedication to workers.



To learn more about Ben Hudnall Memorial Trust services:

visit: www.bhmt.org

email: bhmt@kp.org

call: 1-844-BEN-BHMT