



REQUEST FOR PROPOSAL

Education and Healthcare Workforce Scholarship Endowment Project

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Pottstown Area Health & Wellness Foundation

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INTRODUCTION & BACKGROUND

The mission of the Pottstown Area Health & Wellness Foundation (PAHWF) is to provide equitable access and opportunities for all residents to adopt healthy lifestyles by providing education, funding, and programs to organizations and initiatives that support residents living in the 10-mile radius around Pottstown Borough.

Problem Statement

PAHWF has identified the need to equitably empower Pottstown residents and two anchor institutions with the resources they need for scholarships within essential health and education occupations. This post-industrial community, similar to its contemporary Rust Belt communities, has significant challenges with economic revitalization and workforce development, including worker recruitment and retention to name a few. <https://americas.uli.org/pottstown-pa-2019-advisory-service-panel/>

Instability in the education and healthcare workforce inequitably impacts [health, economic, and education social determinants of health outcomes](#) of historically marginalized community members. These outcomes worsen when the workforce demographics do not reflect the populations they serve. In addition to above average unemployment rates as compared to peer municipalities across Montgomery County, PA, a recent study demonstrated that, among those residing in Pottstown census tracts with the most prevalence of poverty and people of color, only 54.4% work full time and more than half of the workforce earns less than a living and sustainable wage. This serves as another stark reminder to take steps toward Urban Land Institute recommendations to skill up Pottstown residents.

The COVID-19 pandemic exacerbated the fragility of health and education systems. Service disruption brought national awareness to factors that contribute to challenges that institutions face, which were in existence well before the onset of the pandemic. These factors have some common themes, but they also range based on discipline, provider/educator maldistribution, etc. ([PA hospitals call on Gov. Josh Shapiro to address state's health care worker shortage, said to be among worst in nation – The Morning Call](#), [New report offers extensive remedies for Pennsylvania's teacher shortage](#), & [Pottstown Hospital nurses decry unsafe conditions - The Mercury](#)).

RELEVANT WORK & OTHER LOCAL INITIATIVES TO-DATE

PAHWF and local partners have conducted the following work to support project priority areas to-date:

- **Pottstown Urban Land Institute (ULI) Report:** A 2019 [ULI Report](#) stated the most valuable asset in Pottstown is its people. Investing in people to create a robust workforce is one of the best ways Pottstown can remain competitive in a 21st-century job market. PAHWF played an essential role throughout all phases of the 2019 ULI project and has utilized report recommendations as guideposts for strategic planning and project development purposes.
- **PAHWF Community Needs Assessments:** The PAHWF [Tri-County Area Community Health Needs Assessment](#) through partnership with the Public Health Management Corporation (PHMC) is a representative survey of residents within the PAHWF service area, which gathers information about the health and social risks of this community population. The review and analysis of the findings are used to support positive impact that improves lives and reduces disparities in social determinants of health for individuals and families.
- **[PSD Career and Technical Education Program Capacity Boost](#):** Technical grant writing support was provided by PAHWF to the Foundation for Pottstown Education (FPE) in Winter 2021/22 to help them secure funds needed to replace and improve Career and Technical Education (CTE) tool utilization in the Pottstown School District CTE Automotive, Construction, and Healthcare Technology program classroom environments. An award of [\\$77K private grant through the Justamere Foundation](#) was the result of this effort. Pottstown High School's CTE students train in state-of-the-art facilities, learning and applying the industry standard for their profession through laboratory and live work experiences in the following fields:
 - Automotive Technology
 - Engineering Technology
 - Construction Technology
 - Entrepreneurship
 - Cosmetology
 - Healthcare Technology
 - Culinary Arts
 - Management Information Systems (MIS)
 - Early Childhood Education
 - Marketing

Consultants can review additional information on all relevant work to date after submission and approval of an access request for this [document](#).

GOALS & SCOPE

The PAHWF will improve health, education, and economic equity in the Tri-County Area through the development of programs that will improve educator and healthcare worker recruitment, retention, and residency. The scholarship program(s) will increase the proportion of Pottstown residents who possess a high degree of preparedness and motivation to earn a sustainable living wage in the health and education workforce. Specifically, program development through this RFP will prioritize and improve access to these career pathways for residents who identify as Black, Hispanic, Latina/o/x, Low-Income, and/or Disabled.

The program development process will be grounded by feedback and guidance provided by lived experience and institutional experts from the education and healthcare system stakeholders. These stakeholders will be engaged throughout the consultants' work, including interviews, focus groups, committees, and/or other best practices as recommended in the RFP response by the consultant.

The Foundation seeks the most efficient and effective process to utilize endowment and grant funding in order to institute multiple scholarships and incentives for both post-secondary education and employment. These should include traditional scholarships to post-secondary education and may also accompany other methods such as loan forgiveness, residency incentives, and an array of non-traditional or industry-specific incentives that are identified through research and/or outreach.

GOALS



Scholarship and Employee Incentive Awards Programs

Consultant will utilize stakeholder feedback, research data, and peer expertise to create program models, documentation/outreach collateral, award processes, and sustainability plans. This will support at least four endowment-supported program areas that donors or grantors may consider for monetary or other contributions. These four scholarship program area recipients may

be:

1. New or current employees at Pottstown School District
2. New or current employees at Pottstown Hospital

3. Pottstown School District students to pursue education at 2 or 4 year education institutions to return for employment at Pottstown School District
4. Pottstown School District students to pursue education at 2 or 4 year education institutions to return for employment at Pottstown Hospital

The consultant will mesh these traditional scholarship program areas with non-traditional supports required for scholarly pursuit within different health and education fields. These supports may include mentorship, residency, and student loan, re-training, and accreditation forgiveness.



Research-Based Models that Foster Equitable & Diverse Workforce

PAHWF seeks a healthy sustainable workforce that prioritizes a culture of diversity, equity and inclusion. The consultant will prioritize research on local and national models, best practices, and/or system adaptations to improve equitable access to program delivery among marginalized populations. Data and information collected through these efforts will be communicated through easy-to-read one-pagers or white papers to inform project development decisions and resource utilization.



Continual Feedback and Functional Tools

Community partnership is vital to this project's long-term sustainability. The consultant will establish and execute a program development process that intentionally and continuously engages the intended recipients and local education and healthcare stakeholders to design, develop, implement, and evaluate the program. The inclusion of individuals at various levels and departments within career pathways and the youth voice is paramount as is the provision of a framework for the resources, structures, and processes for the program to support the integral components of all scholarship and workforce incentive programs.

PROJECT DELIVERABLES

PAHWF seeks a partnership with a consultant to lead in the planning and coordination (both content-related and technical support) to provide the following project deliverables. While the consultant reserves the right to amend and/or is encouraged to recommend additional deliverables when applicable.

1. **Feedback Systems that Center Equity in Process:** The consultant will empower project partners to drive decision-making with a proposed engagement

process to harness knowledge and share findings from research of current landscape of recruitment and retention barriers encountered by Black, Hispanic, Latina/o/x, Low-Income, and/or Disabled Pottstown residents. The proposed feedback system will engage health and education workforce stakeholders, including industry and community-level stakeholders (i.e. past and present Pottstown School District CTE Program participants) residing in Pottstown. PAHWF will work with the consultant to arrange partner convenings for stakeholder interviews, project development updates, and other discussions as proposed. Partners may be interviewed or convened via focus groups to discuss peer-based examples and other research to guide them through the identification of equity-centric short and long term project benchmarking to track program outcomes related to systems change and the intended program participants that will inform the program. The consultant will identify and seek to treat partner knowledge and representation gaps throughout all project phases.

2. **Scholarship and Employment Incentive Programs and Eligibility Requirements:** The consultant will create at minimum four scholarship education and healthcare workforce endowment programs. In addition to tuition awards, there may be employee incentives such as loan forgiveness, residency, and other professional development and career advancement opportunities. Additional activities considered best practice and/or identified through partner and community dialogues may also be considered. Examples of scholarships and incentives identified by Foundation research are the following:
 - a. **Tuition Award:** Develop scholarship programs which serve 1) PSD students to pursue education at 2- or 4-year education institutions to return for employment at PSD and 2) PSD students to pursue education at 2- or 4-year education institutions to return for employment at Pottstown Hospital - Tower Health. 2-year degree opportunities should be prioritized for Montgomery County Community College Pottstown Campus.
 - b. **Loan Forgiveness:** Develop education loan forgiveness program for 1) New or current employees at PSD and 2) New or current employees at Pottstown Hospital.
 - c. **Residency Incentives:** Identify and provide education on an equity-centric benchmark which could serve as an indication of a reduction of economic segregation within the Borough of Pottstown. Consultant will leverage the existing Foundation for Pottstown Education's "Residency Incentive Loan Program," the Pottstown Land Bank, and first time homeowner financial education programs. These initiatives will improve economic mobility by strategically incentivizing purchase and improvement of Pottstown's housing stock within neighborhoods with high poverty levels surrounding PSD schools.
 - d. **Mentorship Support:** Consultant to identify and support existing or potential peer-based mentorship program models that utilize promising

and/or evidence-based practices to improve recruitment and retention of health and education employees, including potential job coaching, guidance, and other post-employment skills.

- e. Benefits and Incentives:** Provide stakeholders with best practice expertise grounded in qualitative and quantitative data to support identification of essential external supports ([benefits and incentives](#)) needed to equitably empower Pottstown residents to pursue health and education scholarship.
- 3. Operational Program Model(s):** The internal and external mechanisms to communicate opportunities, launch the application, review process, endowments stewardship, and award funding are required as part of the proposal. Program intake paperwork will reflect a value of professional, educational, and lived experience. The consultant will provide partners with options for potential long-term program models, including organizational charts and committee structure, if proposed by the consultant.
- 4. Project Funding Sources:** Coordinate with PAHWF Grant Writer to identify public and private funding opportunities which will support the long-term sustainability of program operation beyond the project launch date. Provide long-term sustainability plan outline for partners, with considerations for operational budget project modeling beyond years 5, 10, and 15 with grants and individual giving activity suggestions.
- 5. Project Plan and Timelines:** Provide a clear plan that outlines the implementation strategy for the project, including specific timelines for completion of deliverables. The project plan should track activities, tasks, as well as initiative milestones. Specifically, project initiation, planning, execution, monitoring, controls, and procedures for closure are necessary components. Consideration of potential scope change requests due to unforeseen barriers to activities, especially as they may impact timeline milestones.
- 6. Communications Resources:** Provide materials that summarize and develop a multimedia toolkit with support from PAHWF staff to communicate scholarship and employment incentive opportunities, such as community forum, website materials, summary infographics, and/or one-pager reports.

TECHNICAL DETAILS

To achieve the successful completion of the project, the following technical criteria should be met:

- **PLAN AND SUPPORT FACILITATION** - Project kickoff meetings and regular meetings will occur beginning in **November 2023 and the anticipated project end date is October 31, 2024.**
 - PAHWF MEETINGS - It is anticipated that meetings with Foundation staff will occur Bi-weekly with Team Project Lead/Program Officer and Grant Writer. In addition, the entire Project Team will meet monthly.
 - The CONSULTANT and FOUNDATION will develop a project plan that includes consideration of meeting times and schedules for both PAHWF and stakeholders/committees. The CONSULTANT will develop meeting agendas with input from the Project Lead/Program Officer and Grant Writer. The CONSULTANT will distribute the agenda three days in advance to all applicable team members.
- Upon entering into an agreement, CONSULTANT agrees to work with FOUNDATION to refine and solidify a timeline for deliverables.
- **TECHNICAL AND SUPPORT** - Build communication mechanisms with collaborators and provide briefs that summarize partner engagement(s) on a regular basis.
- **FOLLOW UP AND REPORTING** - Provide FOUNDATION with materials that summarize findings from the engagement which include some or all of the following:
 - Problem statement, proposed solution, collaborative partners, qualitative and quantitative data resulting from the work, including partner feedback to support FOUNDATION learning and improve future initiatives, and recommended next steps.
 - Powerpoint presentation and/or detailed report summary (unless otherwise specified) to be utilized both internally and externally (public facing).
 - Commitment on behalf of CONSULTANT to present findings to FOUNDATION committees, Board, and at least one community forum.
 - Summary infographic(s) or one-pager report(s) to share on FOUNDATION website or in other publications.

SUBMISSION GUIDELINES & REQUIREMENTS

The following submission guidelines and requirements apply to this Request for Proposal:

1. The response to this request should be written in the form of a scope of work and include responses to all the elements of this document. Click here to access a [scopes of work](#) template and a preferred [budget](#) template, which you have the option to utilize or refer to as a guide. You may utilize language from this RFP to complete these templates.
2. Cost proposals should indicate the overall fixed price for the project as well as a timeline of deliverables. It is recommended that costs are separated into phase(s) and invoiced at the time of completion of associated deliverables.
3. The preferred and standard invoicing method is partial payment upon project kickoff, invoices at time of completion of deliverables associated with phases, and last payment due upon delivery of project summary materials as specified in your proposed scope of work.
4. Proposals must be signed by an authorized representative of the responding company.
5. If your company has a standard set of terms and conditions, please submit them with your proposal. All terms and conditions will be subject to negotiation.
6. As part of their response, **bidders should specify at least two projects that are substantially similar to this one.** Please provide references for these projects as well as examples of your prior work.
7. Bidders should communicate how their company and any potential subcontractors for the work has and will support and include residents or lived experience experts of the target area of the proposal and/or residents and businesses of PAHWF service area which can complete some or all of the proposed subcontracted work (when applicable).
8. Proposals should be received prior to the proposed end date and remain valid for a minimum of 30 days or more.
9. In most cases, PAHWF anticipates choosing at least two bidders to have more in-depth discussions. In most cases, a final selection will be made from among these “down-selected” individuals or companies.

SUBMISSION OF APPLICATION/PROPOSAL

The deadline to submit a proposal is Wednesday, October 11, 2023.

CONSULTANT proposals will be submitted by way of:

- Team Resumes/CVs
- Written Scope of Work, Budget Proposal, and Interview for (those selected by PAHWF).
- Conversation with PAHWF Leadership and/or Staff
- Electronic Portfolio

Questions and Final Proposals should be directed to Ashia Cooper, Program Officer and Chris Wierzbowski, Grant Writer via email at cwierzbowski@pottstownfoundation.org.

Thank you for your consideration to support our project, and we look forward to learning more about your interest to partner with the Pottstown Area Health & Wellness Foundation.