



Phoenix Pathways to Ownership Initiative™

From Character to Career. From Career to Ownership.

PARTNER COMMITMENT PACKAGE

A practical pathway from interest to documented collaboration

Phoenix Pathways to Ownership Initiative™

Featuring The Dynamics of Highly Successful Living™

16-Week Maryland Pilot | Approximately 12–16 Participants

Prepared by Charles E. Hall Sr., Founder and Program Lead

PURPOSE: To help prospective partners define, approve and document a conditional role in the Phoenix pilot without creating an immediate financial obligation.

This package is a planning instrument. A signed commitment letter expresses good-faith intent but is subject to funding, capacity, legal review, institutional approval and any later definitive agreement.

1. Partner Overview

The Opportunity

Phoenix Pathways to Ownership Initiative™ is a proposed Maryland workforce, reentry and economic-mobility program. Phoenix is designed to help justice-impacted and economically disadvantaged individuals progress from character development to sustainable careers, entrepreneurship and responsible pathways to ownership.

The proposed 16-week pilot will serve approximately 12–16 participants and use The Dynamics of Highly Successful Living™, a character-gated curriculum created and taught by Charles E. Hall Sr. during more than 13 years of incarceration. The curriculum combines mindset and accountability with workforce readiness, financial literacy, construction and property-preservation training, real-estate education, career preparation and entrepreneurship.

Pilot Snapshot

Program Element	Current Design
Geography	Maryland, with an initial focus on Prince George's County and the greater DMV
Participants	Approximately 12–16 justice-impacted and economically disadvantaged adults
Duration	16 weeks, followed by retention support at 30, 90, 180 and 365 days
Startup campaign	\$60,000 for sponsor-approved legal and operational readiness
Full pilot planning budget	\$468,000, subject to confirmed funding, partners and funder rules
Core outcomes	Credentials, supervised work experience, placement, retention and ownership readiness

Program Principle

Character before capital. Discipline before opportunity. Documented readiness before advancement.

Phoenix delivers the opportunity. The Dynamics develops the individual. Career provides economic stability. Ownership creates independence and generational change.

2. Partnership Opportunities

Partners may select one or more roles. The final scope will be documented in a letter, MOU, contract or fiscal-sponsorship agreement appropriate to the relationship.

Partner Type	Potential Contributions	What Phoenix Provides
Fiscal sponsor	Charitable oversight, donation processing, compliance and financial administration	Program materials, budgets, reports, disclosures and sponsor-approved fundraising
Training / credential provider	OSHA, NCCER, EPA/RRP, CPR, technical instruction or testing	Participant preparation, attendance controls, curriculum coordination and outcome records
Reentry / case-management partner	Referrals, barrier assessment, supportive services and retention	Structured program, progress reporting and coordinated participant plans
Worksite / property partner	Approved sites, project access, supervision coordination or project referrals	Licensed supervision, safety controls, documentation and defined scopes
Employer partner	Jobsite visits, mock interviews, interviews, apprenticeships or employment	Prepared candidates, skills records and retention follow-up
Evaluator / data partner	Measurement design, data review, evaluation and validation	Access to approved aggregate data, implementation records and reporting support
Housing / rehabilitation partner	Repair pipeline, technical guidance, contractor access or community referrals	Workforce model, trained participants and controlled service agreements

No Immediate Financial Obligation

A partner may support planning, referrals, technical assistance, introductions or conditional collaboration without committing funds. Any financial commitment, procurement, participant payment or related-party transaction requires separate written approval.

3. Partner Role Selection Form

Organization: _____

Primary contact and title: _____

Email and telephone: _____

Proposed Role(s)

- ☐ Fiscal sponsorship and charitable administration
- ☐ Participant referrals and eligibility coordination
- ☐ Case management and supportive services
- ☐ OSHA, NCCER, EPA/RRP, CPR or other credentials
- ☐ Construction or technical instruction
- ☐ Classroom, laboratory or training-facility access
- ☐ Worksite, property or rehabilitation-project access
- ☐ Employer introductions, jobsite visits or mock interviews
- ☐ Interviews, apprenticeship consideration or employment consideration
- ☐ Program evaluation, data design or outcome validation
- ☐ Housing, preservation or community-development coordination
- ☐ In-kind tools, PPE, materials, transportation or professional services
- ☐ Other: _____

Planning Parameters

Anticipated contribution or activity: _____

Estimated availability or timeframe: _____

Conditions or required approvals: _____

Named planning representative: _____

Selection of a role does not create a contract or financial obligation. Final responsibilities must be confirmed in an appropriate written agreement.

4. Conditional Letter of Commitment

[PARTNER LETTERHEAD]

Date: _____

Charles E. Hall Sr.
 Founder and Program Lead
 Phoenix Pathways to Ownership Initiative™
 Fort Washington, Maryland

Re: Conditional Partnership Commitment for the Phoenix Pathways 16-Week Pilot

Dear Mr. Hall:

[ORGANIZATION NAME] has reviewed information concerning Phoenix Pathways to Ownership Initiative™ and its proposed 16-week Maryland pilot using The Dynamics of Highly Successful Living™ curriculum. Based on our present understanding, the program generally aligns with our interest in workforce development, reentry, construction, housing, education, economic mobility and/or community development.

Subject to available funding, organizational capacity, required approvals and a mutually acceptable final agreement, [ORGANIZATION NAME] is willing to explore the following role(s):

- ☐ Participant referral, case management or supportive services
- ☐ Training, credentials or technical instruction
- ☐ Worksite, property, housing or rehabilitation coordination
- ☐ Employer introductions, interviews, placement or data support
- ☐ Fiscal sponsorship or charitable administration
- ☐ Other: _____

Our organization will designate _____ as its initial planning representative.

This letter reflects good-faith planning interest and creates no legally binding obligation. Any final commitment requires appropriate funding, capacity, due diligence, approval and written documentation.

Sincerely,

Authorized representative: _____

Title: _____

Organization: _____

Signature: _____ **Date:** _____

5. MOU Development Framework

After a conditional letter is accepted, Phoenix and the partner should use this framework to develop an MOU or other definitive agreement.

MOU Section	Questions to Resolve
Purpose and scope	What problem are the parties addressing, and what specific activity is included?
Term and renewal	When does the relationship begin and end? How may it be renewed?
Responsibilities	Who recruits, trains, supervises, pays, documents, evaluates and follows up?
Funding and costs	Is either party paying? Which costs are allowable? Who approves expenses?
Participant safety	Who controls worksites, credentials, PPE, incidents, transportation and insurance?
Data and confidentiality	What information may be shared, with what consent, security and retention rules?
Brand and communications	Who may use names, logos, photographs, testimonials and public announcements?
Intellectual property	Phoenix retains its curriculum and brand; partners retain their pre-existing materials.
Conflicts and procurement	How will founder-related businesses and compensation receive independent review?
Performance	What outputs, outcomes, records and reporting dates apply?
Termination	How may either party withdraw, and how will participants and funds be protected?

Non-Negotiable Controls

- No double billing of the same labor, material, participant cost or service.

- No party approves its own compensation or related-party contract.
- No participant performs work without required supervision, insurance and safety controls.
- No public claim of partnership until both parties approve the language.
- No exchange of sensitive participant information without a lawful purpose and written safeguards.

6. Twenty-Minute Exploratory Meeting Agenda

Time	Discussion
0–3 minutes	Introductions and the partner’s mission, programs and current priorities
3–7 minutes	Phoenix overview: character, career, ownership and the 16-week pilot
7–12 minutes	Potential role, overlap with existing services and duplication to avoid
12–16 minutes	Capacity, approvals, funding conditions, compliance and timing
16–19 minutes	Define a realistic next step and responsible contact
19–20 minutes	Confirm documents, follow-up date and whether a conditional letter is appropriate

Questions Phoenix Should Ask

- Which part of the Phoenix model best aligns with your current work?
- What must Phoenix demonstrate before your organization can issue a commitment letter?
- Who has authority to approve a letter, MOU or partnership?
- What funding, eligibility, procurement, insurance or data requirements would apply?
- What existing program should Phoenix complement rather than duplicate?
- What is the smallest responsible pilot activity we could undertake together?
- What timeline is realistic for review and approval?

Questions Phoenix Must Be Prepared to Answer

- Who controls charitable funds and approves expenditures?
- How are founder compensation and related businesses independently reviewed?

- Who supervises worksites and protects participants?
- How will credentials, work hours, placement and retention be verified?
- What happens if full pilot funding is not secured?

7. Due-Diligence and Follow-Up Checklist

Materials Phoenix Can Provide

- ☐ Program Framework and Master Blueprint
- ☐ Founder Qualifications
- ☐ 16-week curriculum outline
- ☐ \$60,000 startup budget and \$468,000 pilot planning budget
- ☐ Conflict-of-interest and related-party disclosures
- ☐ Insurance and licensing documentation when applicable
- ☐ Outcome scorecard and data plan
- ☐ Draft commitment letter or MOU
- ☐ References, resumes and supporting credentials when requested

Internal Review Before Accepting a Commitment

- ☐ Confirm the signer has authority or identify the required approver.
- ☐ Confirm the proposed activity is within each organization's mission and capacity.
- ☐ Identify costs, funding source and any procurement requirement.
- ☐ Confirm insurance, credential, licensing and safety boundaries.
- ☐ Document data-sharing and participant-consent requirements.
- ☐ Disclose and independently review any founder-related transaction.
- ☐ Calendar the next action, responsible person and deadline.

Suggested Follow-Up

Three business days after outreach: Send a concise check-in and offer a 20-minute meeting.

Five business days after outreach: Call the organization and request referral to the appropriate person.

Seven to ten business days after outreach: Send a final courteous follow-up, then move the organization to the longer-term outreach list unless it responds.

8. Follow-Up Email Templates

First Follow-Up

Subject: Follow-Up — Phoenix Pathways Partnership Meeting Request

Dear [NAME],

I am following up on my recent message regarding Phoenix Pathways to Ownership Initiative™ and our proposed 16-week workforce, reentry and ownership pilot. I would appreciate a brief opportunity to determine whether the program aligns with your organization's current work.

We are not requesting an immediate financial commitment. We are seeking technical guidance and, if appropriate, a conditional planning commitment subject to funding, capacity and a final agreement.

Would you or the appropriate member of your team be available for a 20-minute conversation?

Thank you,
Charles E. Hall Sr.

Referral Request

Subject: Request for the Appropriate Partnership Contact — Phoenix Pathways

Dear [NAME],

Thank you for reviewing my inquiry. If this matter falls outside your responsibilities, would you please direct me to the person responsible for [FISCAL SPONSORSHIP / WORKFORCE PARTNERSHIPS / CONSTRUCTION TRAINING / REENTRY SERVICES / HOUSING REHABILITATION]?

I would be grateful for the introduction and will keep the request concise.

Sincerely,
Charles E. Hall Sr.

After a Positive Meeting

Subject: Thank You and Proposed Next Step — Phoenix Pathways

Dear [NAME],

Thank you for meeting with me to discuss Phoenix Pathways. My understanding is that the next step is [ACTION], with follow-up by [PERSON] on or before [DATE].

Attached is a draft conditional commitment letter reflecting the limited role we discussed. It

creates no immediate financial obligation and remains subject to your organization's review, capacity and approval procedures. Please revise it as necessary.

I appreciate your guidance and look forward to continuing the conversation.

Sincerely,
Charles E. Hall Sr.

9. Contact and Document Control

Program	Phoenix Pathways to Ownership Initiative™
Curriculum	The Dynamics of Highly Successful Living™
Founder and Program Lead	Charles E. Hall Sr.
Location	Fort Washington, Maryland
Telephone	703-201-8936
Email	Challremc@gmail.com
Motto	From Character to Career. From Career to Ownership.

Recommended Use

Use this package after an organization expresses interest or before a partnership meeting. Customize the role-selection page and commitment letter for the specific organization. Do not represent a prospective partner as committed until an authorized representative has approved the language.

Document Status

Partner Commitment Package | Version 1 | July 2026

This package should be reviewed by the fiscal sponsor or qualified counsel before Phoenix relies on a commitment for a grant, contract, participant placement, insurance decision or public announcement.

Phoenix Pathways to Ownership Initiative™
Launching in America. Backed by the World.
From Character to Career. From Career to Ownership.