



# Healthcare Occupations Workforce Needs Assessment

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Preliminary Findings  
May 16, 2014

**Centers of Excellence (COE)**  
Laura Coleman  
Director, South Central Region

# About the COE

The Centers of Excellence deliver labor market research customized for community college decision making and workforce development.

As a technical assistance provider, the COE work with colleges, regions and the sector networks to:

- Identify opportunities and trends in high growth, emerging, and economically critical industries and occupations.
- Estimate the gap between labor market demand, available training, and existing or future workers.
- Help regions respond to workforce needs by providing them quality information for decision-making.

# Common Research Questions

- Where are existing regional programs in comparison to where sector employers are located?
- Is there an adequate supply of trained workers to meet labor market demand now and in the near future?
- How job-ready is the community college-prepared workforce from an industry perspective?
- Should regional college(s) add courses or new programs? Should the region reduce, modify or retire programs?

# Regional COE



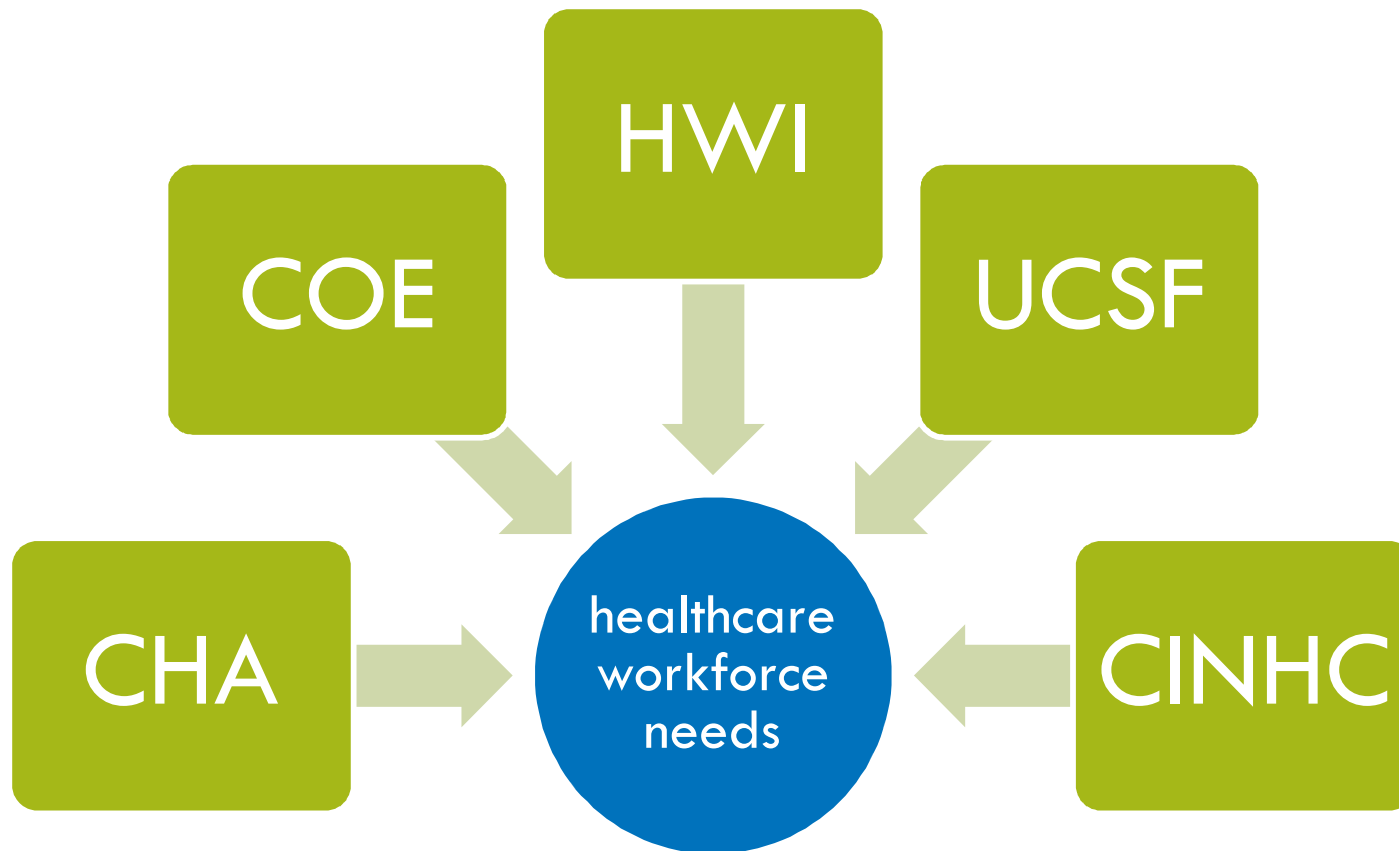
Region	Director
San Diego-Imperial	Zhenya Lindstrom
Inland Empire/Desert	Lori Sanchez
Los Angeles-Orange	Audrey Reille
South Central	Laura Coleman
Central	Michelle Marquez
Bay Area	John Carrese
North-Far North	Theresa Milan

# Today's Conversation

- Project Infrastructure
- Data Collection
- Preliminary Findings
- Next Steps



# Common Goals



# Overview

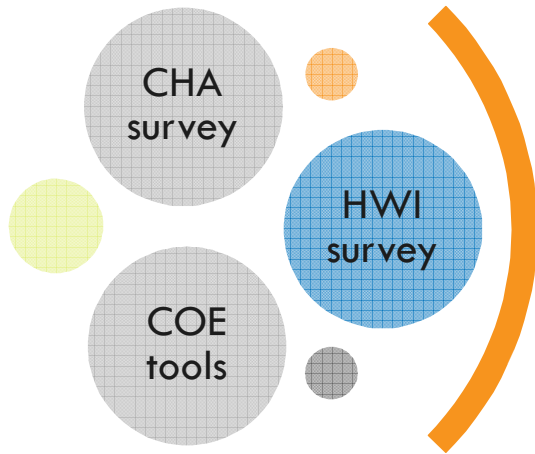
## What is involved?

- A statewide study of more than a dozen healthcare occupations with community college relevance
- A collaboration of industry and education partners
- Multiple employer survey efforts – soliciting input from hundreds of healthcare employers statewide.

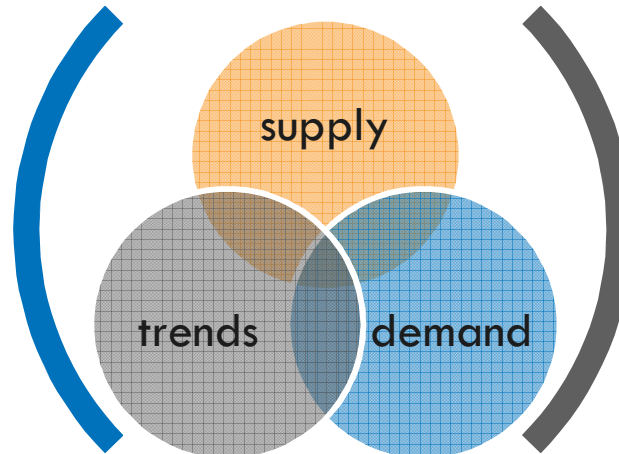
## Who is involved?

- **California Hospital Association (CHA) / Hospital Association of Southern California (HASC)** – Surveyed 190+ member hospitals statewide about employment levels, vacancies, hiring needs, etc. on a quarterly basis. 22 job titles included. The CHA survey was conducted February – early March of 2014.
- **COE/HWI** – Conducting a one-time non-Hospital employer survey statewide in spring of 2014. Aligning data points with CHA's 2013 Quarter 4 survey. 12 job classifications included. In field March – April, 2014.
- **UCSF Institute for Health Policy Studies & Center for the Health Professions** – Conducts a survey of Chief Nursing Officers in hospitals statewide in partnership with CHA/HASC and the **California Institute for Nursing & Health Care**.

# Project Phases



Gather Data



Conduct Analysis



Report Findings

## Input from:

- 1,600+ non-hospital employers
- 190+ hospital surveys
- Supply side data
- Other LMI data sources

## Involves:

- 7 COE
- HWI Sector Navigator
- 10 HWI DSNs

## Actionable data for:

- Program decision-making
- Career counseling
- Curriculum development



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# Industry Overview

## Universe: Healthcare Industry

- ~1.3 million jobs
- 80,000+ employers
- \$19 billion quarterly payroll

## Nursing & Residential Care

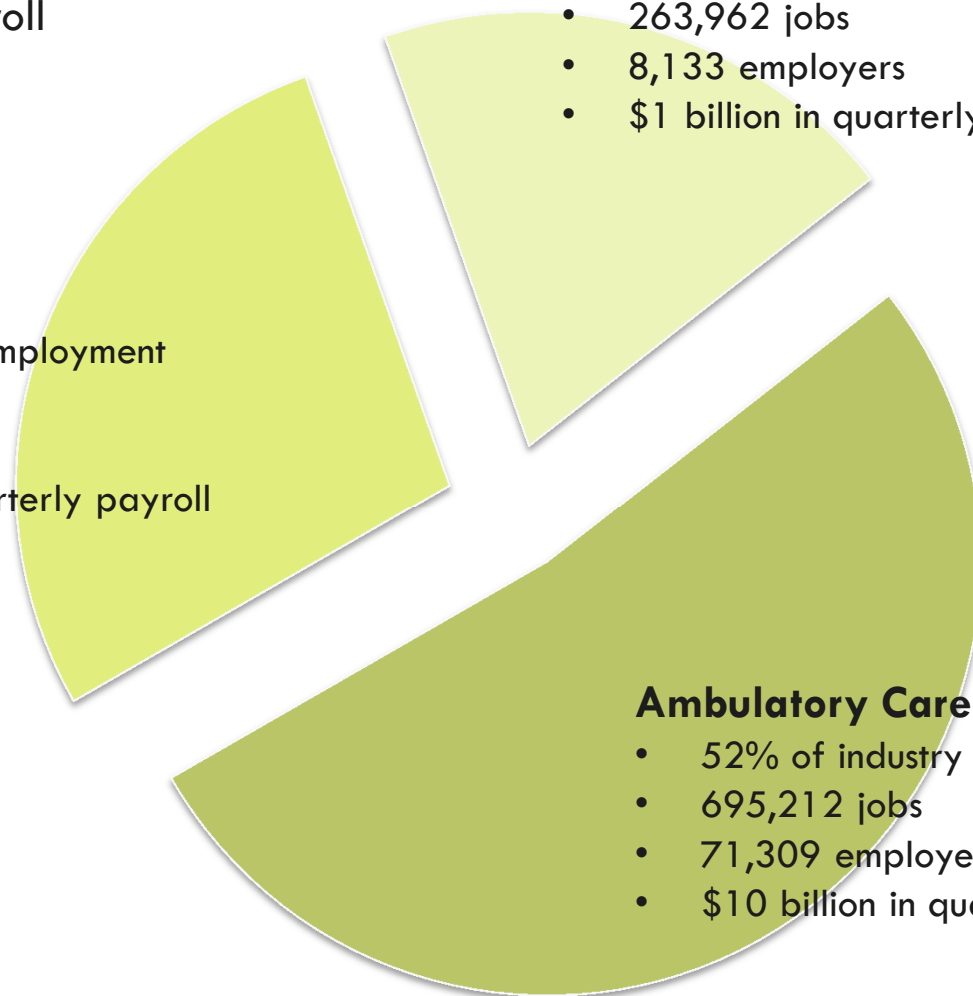
- 20% of industry employment
- 263,962 jobs
- 8,133 employers
- \$1 billion in quarterly payroll

## Hospitals

- 28% of industry employment
- 371,334 jobs
- 745 employers
- \$6.7 billion in quarterly payroll

## Ambulatory Care

- 52% of industry employment
- 695,212 jobs
- 71,309 employers
- \$10 billion in quarterly payroll



# Survey Alignment

	Employment		Difficulty Hiring		Professional Development		Occupational Trends
	COE	CHA	COE	CHA	COE	CHA	COE only
Certified Nurse Assistants	■	■	■	■	■	■	■
Clinical Laboratory Scientists*	■	■	■	■	■	■	■
Coders	■	■	■	■	■	■	■
Home Health Aides	■	■	■	■	■	■	■
Licensed Vocational Nurses	■	■	■	■	■	■	■
Medical Assistants	■	■	■	■	■	■	■
Medical Laboratory Technicians*	■	■	■	■	■	■	■
Occupational Therapy Assistants*	■	■	■	■	■	■	■
Physician Assistants*	■	■	■	■	■	■	■
Registered Nurses	■	■	■	■	■	■	■
Respiratory Therapists*	■	■	■	■	■	■	■
Social Workers (LCSW)*	■	■	■	■	■	■	■

# Industry Sample

## Sample: COE Survey

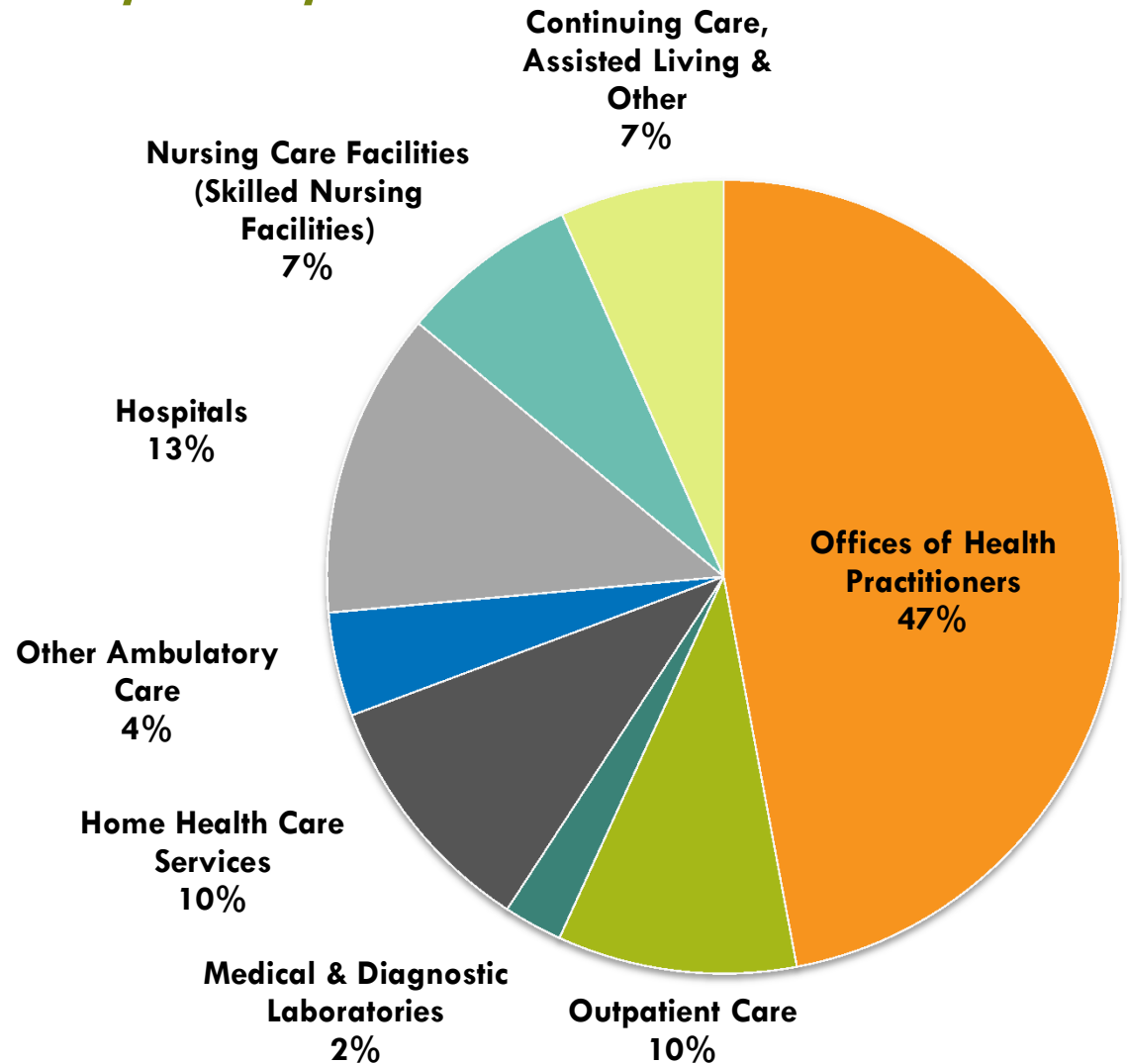
- 12 healthcare occupations
- 1,600+ employers
- 3,200+ occupational completes
- Statewide, plus 10 regional data sets

## Sample: CHA Survey

- 22 occupational titles
- 190+ hospital sites
- ~2,400 occupational records
- Statewide, plus 10 regional data sets

Note: Pie chart combines COE and CHA responses by industry group.

## Survey Participation by Industry Sector





# Today's Conversation

## → Preliminary Findings

### **NOTE:**

Please use caution when sharing or using the Preliminary Findings data.

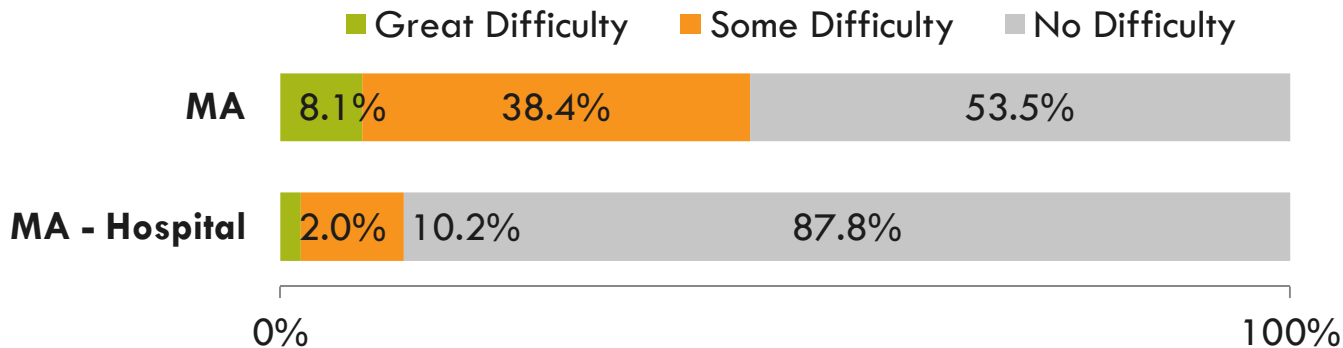
Information shared on the slides to follow represent early data from the survey samples.

Data, data definitions, or methodology may be revised as analysis continues on the state and regional level results.

# Medical Assistants

MA	COE (n=648)	%	CHA (n=128)	%
Current Employment	2,325		2,992	
Recent Job Growth/Decline			(85)	(2.8%)
Projected Job Growth	222	9.5%		
Vacancies	366	15.7%	69	2.3%

## Difficulty Finding Qualified Applicants



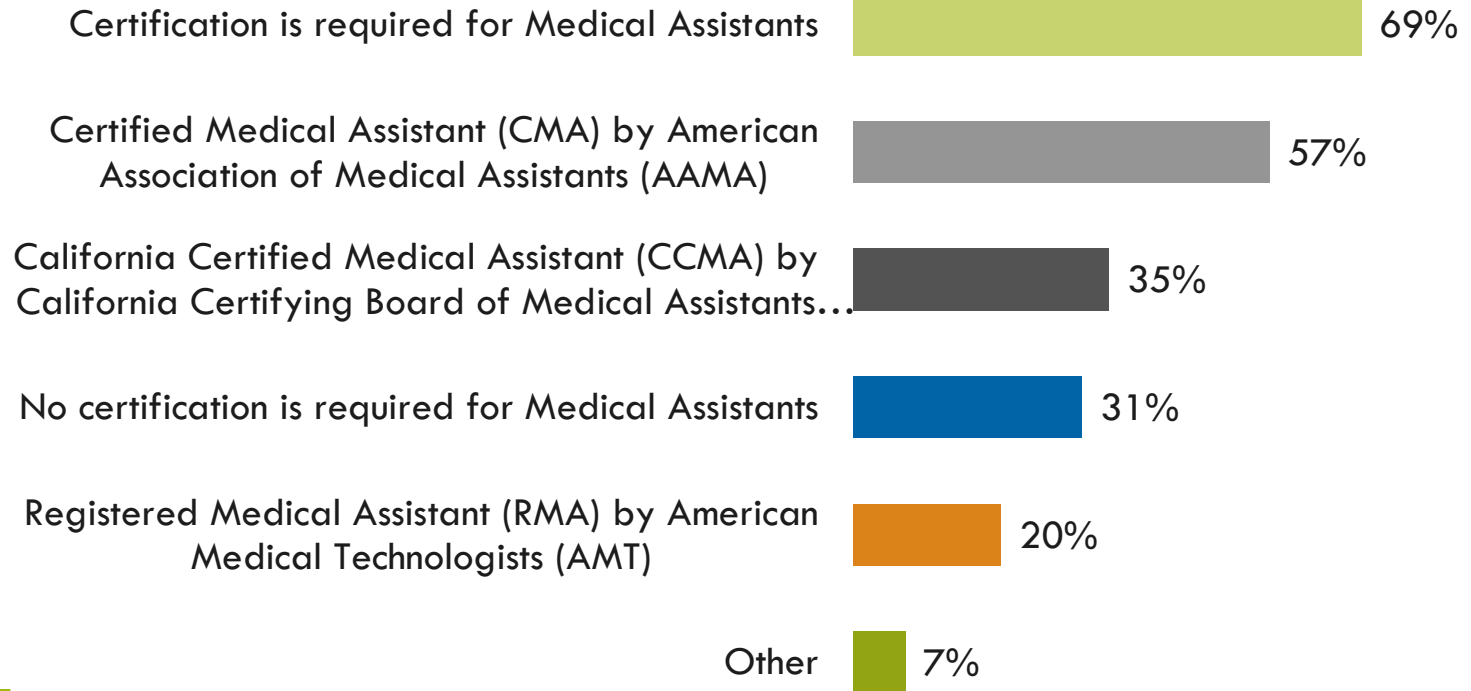
**Hospitals:**  
146 job openings  
for MAs at  
end of 2013

## Professional Development:

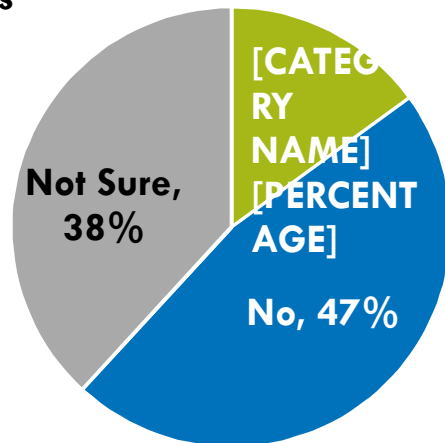
65% of COE and 11% of CHA employers surveyed provide access

# Medical Assistants

## Accepted Certifications



## Implementing Changes to MA Duties in Response to ACA

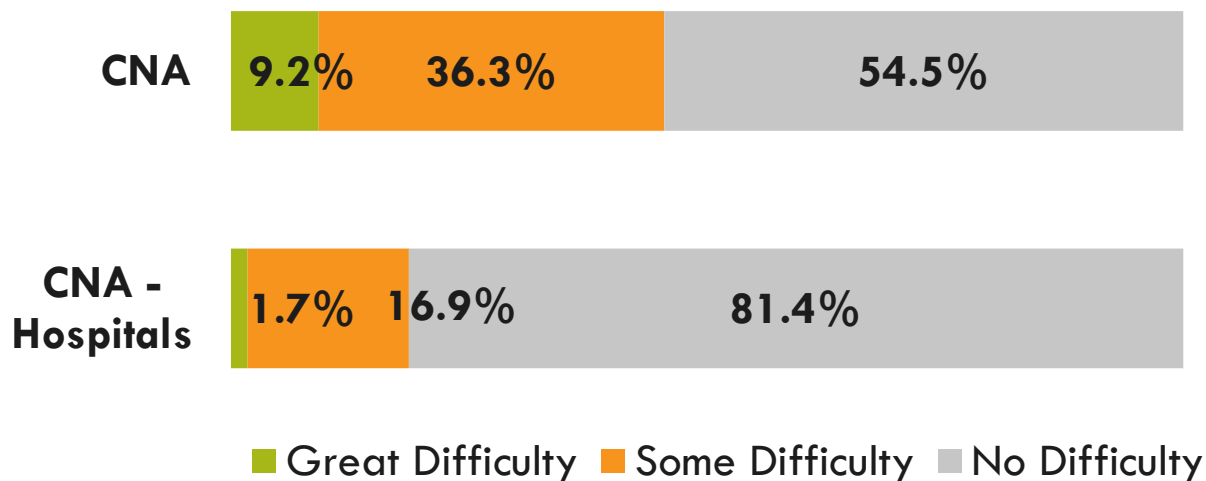


Of employers stating a preference, 48% prefer the Certified Medical Assistant (CMA) by American Association of Medical Assistants (AAMA).

# Certified Nursing Assistants

CNA	COE (n=354)	%	CHA (n=101)	%
Current Employment	6,560		6,512	
Recent Job Growth/Decline			72	1.1%
Projected Job Growth	1,207	18.0%		
Vacancies	1,726	26.3%	226	3.6%

## Difficulty Finding Qualified Entry-Level Applicants



**Hospitals:**  
 213 job openings  
 for CNAs at  
 end of 2013

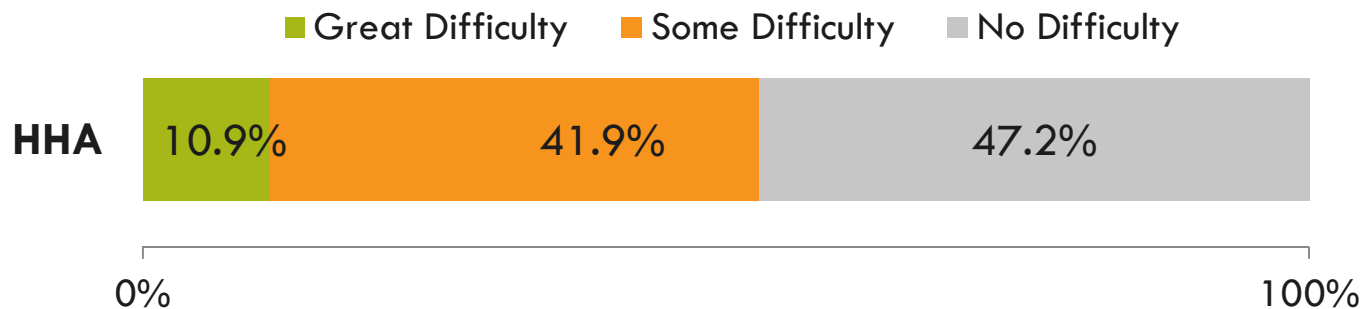




# Home Health Aides

HHA	COE (n=271)	%	CHA (n=38)	%
Current Employment	3,475		485	
Recent Job Growth/Decline			7	1.6%
Projected Job Growth	1,126	32.4%		
Vacancies	1,102	31.7%	29	6.5%

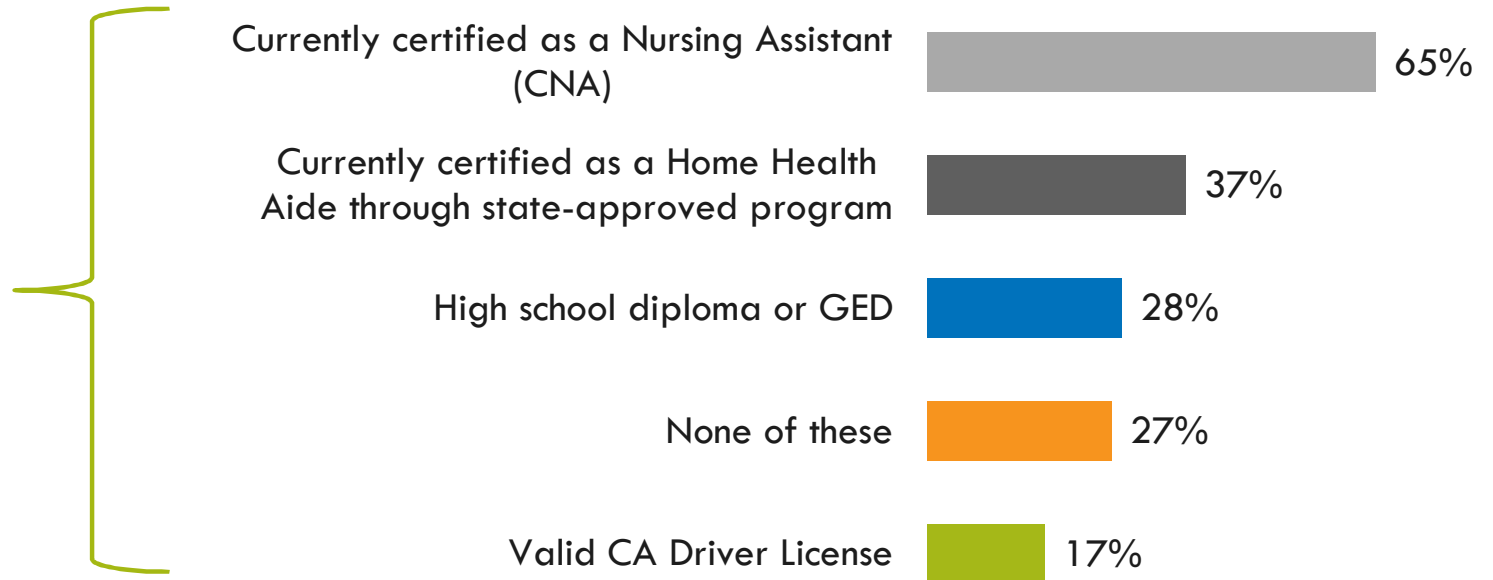
## Difficulty Finding Qualified Applicants



**Hospitals:**  
16 job openings  
for HHAs at  
end of 2013

# Home Health Aides

## Requirements for employment



## Professional Development:

74% of COE employers surveyed provide access

“When the CHHA wants to go into the field of home health or hospice, it is important for them to understand that according to Title 22 guidelines, a minimum of 1 year employment after being licensed is required in order to qualify to work in the field. This is something that the community colleges must emphasize.”

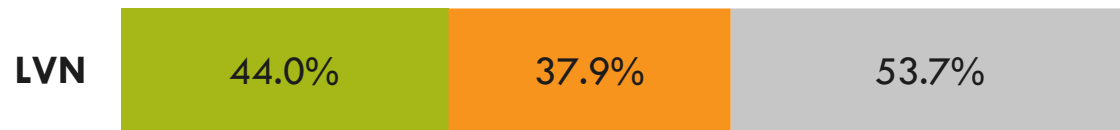
“The Home Health Aide programs should reach out to home care agencies like ours because we are always hiring, and would be happy to get their graduates to work. Their certificates sometimes guarantee them a client, because it reassures them they have had proper training.”

# Licensed Vocational Nurses

LVN	COE (n=370)	%	CHA (n=128)	%
Current Employment	2,716		3,544	
Recent Job Growth/Decline			(33)	(2.7%)
Projected Job Growth	468	17.2%		
Vacancies	772	28.4%	112	2.9%

## Difficulty Finding Qualified Entry-level Applicants

■ Great Difficulty   ■ Some Difficulty   ■ No Difficulty



0% 100%

**Hospitals:**  
169 job openings  
for LVNs at  
end of 2013

# Licensed Vocational Nurses

## Impact of ACA, technology & more on LVNs



- With the number of uninsured patients accessing care rising we need more licensed staff. If an LVN has adequate amount of clinical experience I would not be opposed to hiring more.
- With the increased financial pressures of universal health coverage more work is being provided for LVNs so we see an increased need for LVNS
- With ever decreasing reimbursement from Medicare and other insurances, I foresee utilizing more LVNs in the future as a way to decrease costs.
- Licensed RNs are too costly for our budget.



- Yes, LVN positions may decrease as at times RNs are preferred by insurances, hospitals, etc.
- Well, we use more RNs than LVNs as it is and I think LVNs may be phased out :(
- We won't be hiring LVNs in the future. Most of our nursing positions require RNs and we can use CNAs or Medical Assistants for the other positions
- We only utilize about 50% of our LVNs in their full capacity. The other LVNs function as an MA, because we don't need the LVN level in the clinic
- We are seeing more LVN candidates who are stating that it's getting harder and harder to find work as an LVN

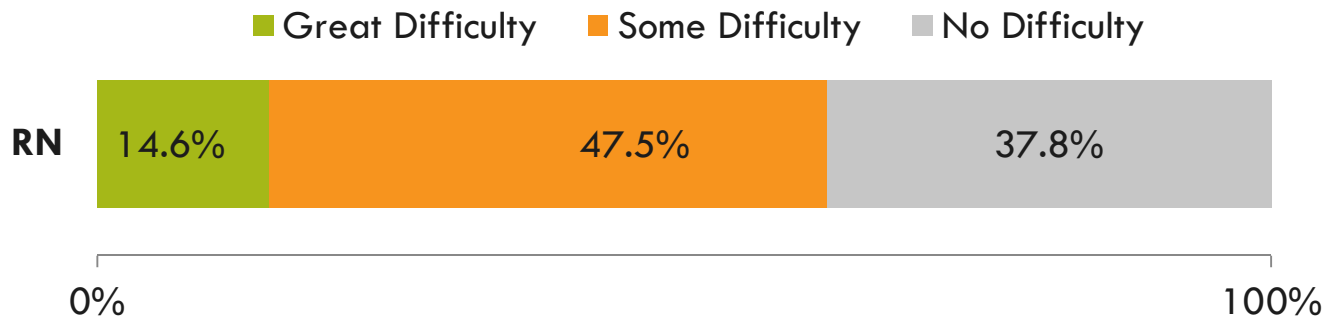
### Professional Development:

67% of COE and 30% of CHA employers surveyed provide access

# Registered Nurses

RN	COE (n=401)	%	CHA (n=168)	%
Current Employment	2,405		72,028	
Recent Job Growth/Decline				
Projected Job Growth	380	15.8%		
Vacancies	493	20.5%	1,896	2.1%

## Difficulty Finding Qualified Applicants



**Hospitals:**  
3,461 job openings  
for RNs at  
end of 2013

## Professional Development:

65% of COE employers surveyed provide access

# Registered Nurses

## Educational Preferences

When hiring Registered Nurses in the future, is your organization more likely to hire a nurse with a Bachelor's degree or a nurse with an Associate degree?

- 68.5% BSN
- 31.5% ADN

## Clinical vs. Admin

When hiring RNs, duties are likely to be...

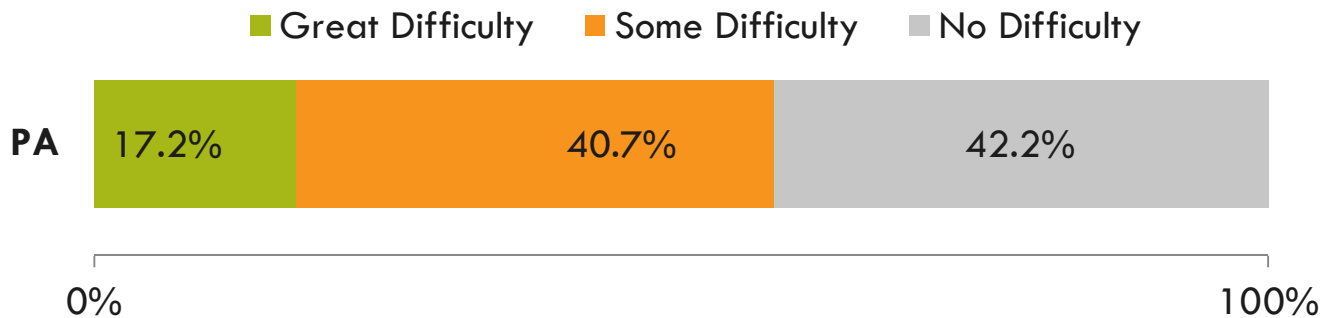
- 65% said Administrative & Clinical
- 31% said Clinical only
- 3.5% said Administrative only



# Physician Assistants

PA	COE (n=244)	%	CHA (n=65)	%
Current Employment	749		609	
Recent Job Growth/Decline			(6)	(1.0%)
Projected Job Growth	129	17.2%		
Vacancies	90	12.0%	9	3.2%

## Difficulty Finding Qualified Applicants



**Hospitals:**  
55 job openings  
for PA at  
end of 2013

## Professional Development:

53% of COE employers surveyed provide access



# Physician Assistants

## Impact of ACA

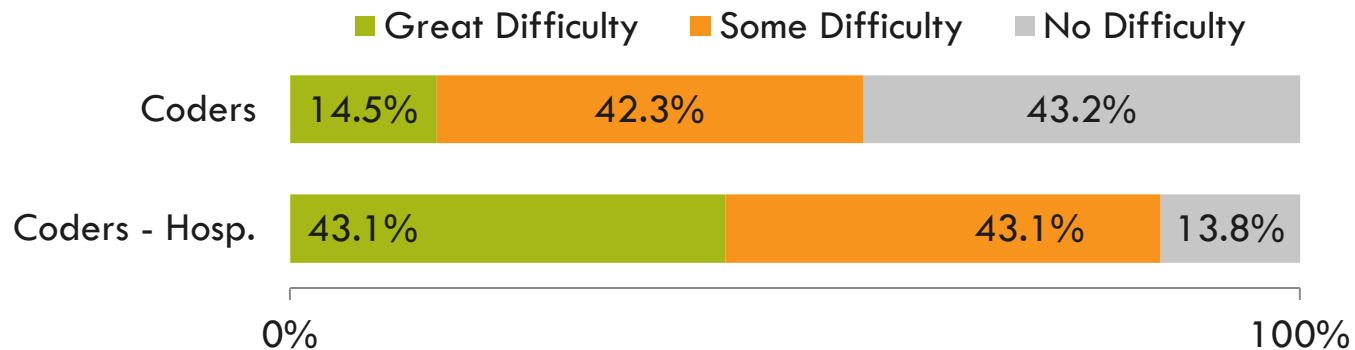


- We'll see more patients, and we need more help from the PAs. They will be spending more time doing documentation using the EHR, and plan of management is geared towards prevention, e.g. cancer screening, immunizations. Quality of work and benchmarks will be measured.
  - With more underserved patients now having better coverage for healthcare - PAs are affected by seeing MORE patients who have perhaps been without medical care for a long time; therefore, MORE patients are coming in and those patients have a multitude of health problems.
  - We will be employing more PAs in the future for our clinics.
  - We have noticed a high new patient rate, therefore it is increasing the work for our PA as we have busier schedules.
- We really don't see any major affects as a majority of our patients are on Medi-Cal.
  - We need more information on how this will impact us.
  - We mostly do workers compensation so it will not affect us as much. May see more of the initial patients and work them up for the practitioner.
  - We have Urgent Care and Family Practice in our office. There should be no change in physician assistants in our office

# Coders

Coders	COE (n=613)	%	CHA (n=127)	%
Current Employment	1,232		1,240	
Recent Job Growth/Decline			(33)	(2.7%)
Projected Job Growth	94	7.6%		
Vacancies	168	13.6%	39	3.2%

## Difficulty Finding Qualified Applicants



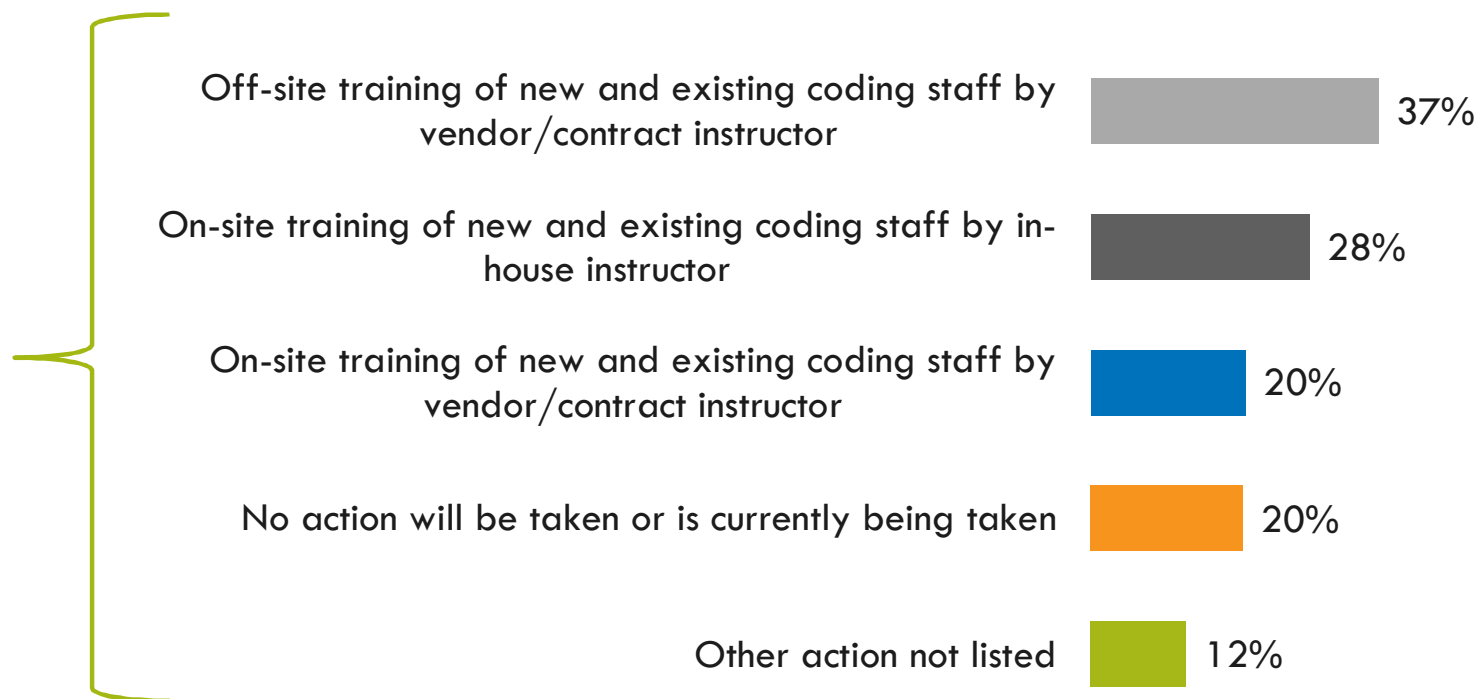
**Hospitals:**  
144 job openings  
for Coders at  
end of 2013

## Professional Development:

60% of COE employers surveyed provide opportunities

# Coders

**ICD-10**  
**“17,000 codes**  
**to 140,000”**



“...with ICD-10 coming...our hospital may open up several more positions as we are being told this will take more time and our claims will be rejected if they are not done correctly.”

“Working and being familiar with electronic billing software ICD-9 to ICD-10 transition and updates Health Insurance system and common companies HIPAA regulations and updates”

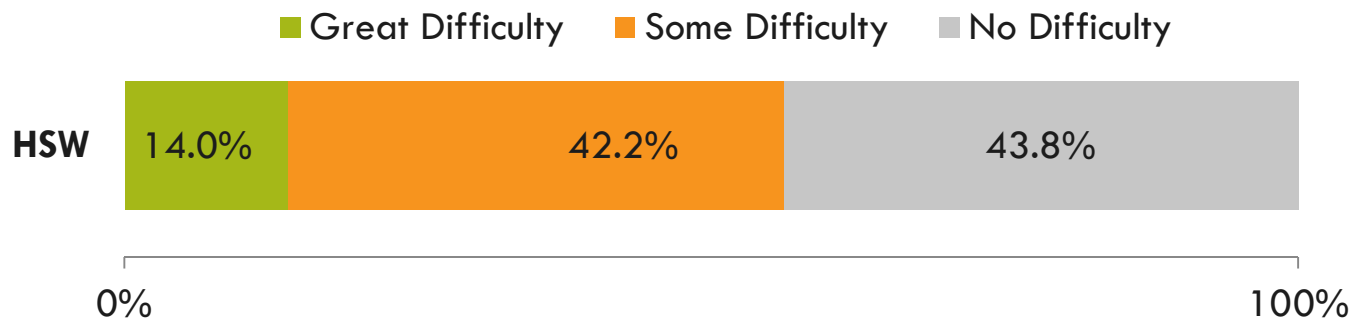
“Worker's compensation billing, Rules for rebilling worker's compensation, new CMS rules for Medicare billing, with ICD.10 coming they need to be very concise in determining a diagnosis code and need to understand ICD.9 as well”

“With healthcare reform - ensuring classes address new categories and types of health insurance available (plus related terminology)”

# Healthcare Social Workers

HSW	COE (n=267)	%	CHA (n=95)	%
Current Employment	1,051		835	
Recent Job Growth/Decline			(39)	(4.6%)
Projected Job Growth	95	9.0%		
Vacancies	160	15.2%	35	4.5%

## Difficulty Finding Qualified Applicants



**Hospitals:**  
40 job openings  
for HSW at  
end of 2013

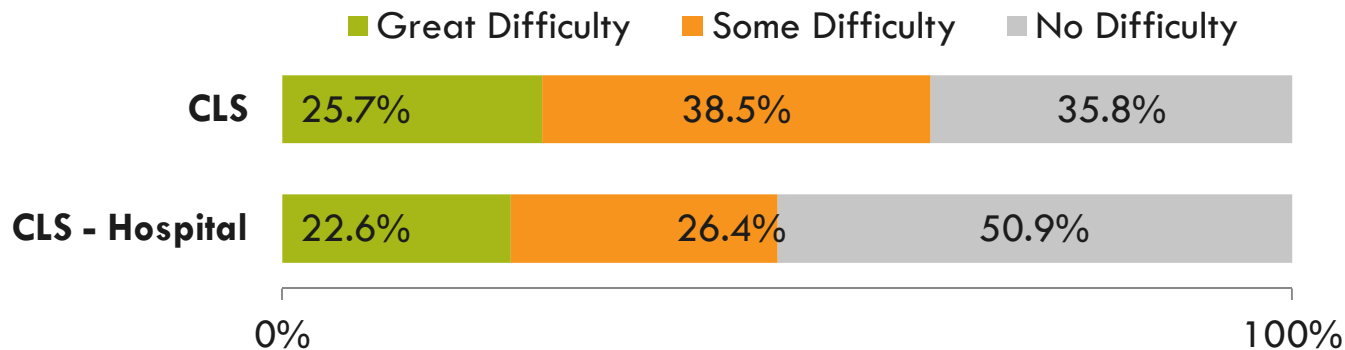
## Professional Development:

62% of COE employers surveyed provide access

# Clinical Laboratory Scientists

CLS	COE (n=75)	%	CHA (n=139)	%
Current Employment	696		3,678	
Recent Job Growth/Decline			(221)	(5.8%)
Projected Job Growth	-	-		
Vacancies	88	12.6%	116	3.1%

## Difficulty Finding Qualified Applicants



**Hospitals:**  
144 job openings  
for CLS' at  
end of 2013

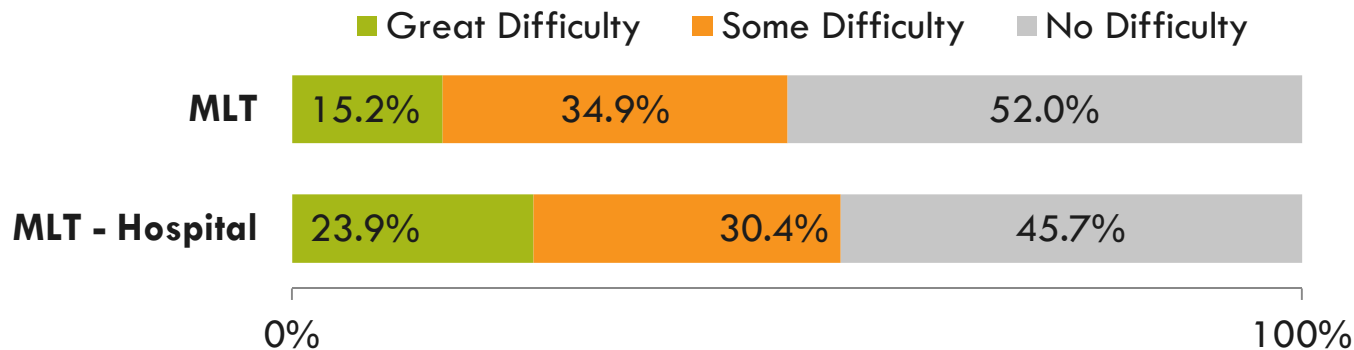
## Professional Development:

41% of COE employers / 16% of CHA hospitals surveyed provide opportunities

# Medical Laboratory Technicians

MLT	COE (n=109)	%	CHA (n=72)	%
Current Employment	607		913	
Recent Job Growth/Decline			(51)	(5.4%)
Projected Job Growth	31	5.1%		
Vacancies	98	16.1%	27	2.9%

## Difficulty Finding Qualified Applicants



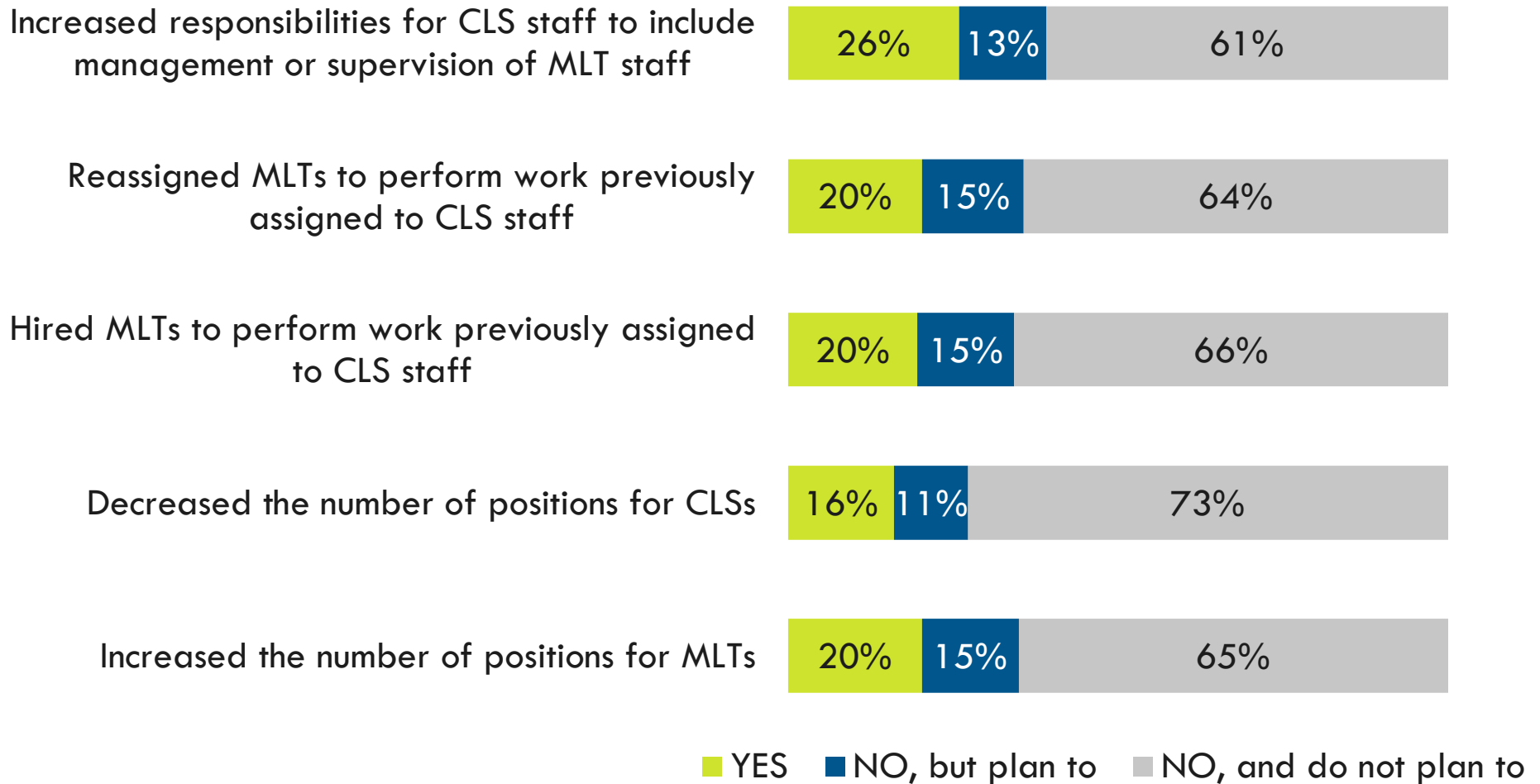
**Hospitals:**  
19 job openings  
for MLTs at  
end of 2013

## Professional Development:

57% of COE and 14% of CHA employers surveyed provide access

# MLT & CLS

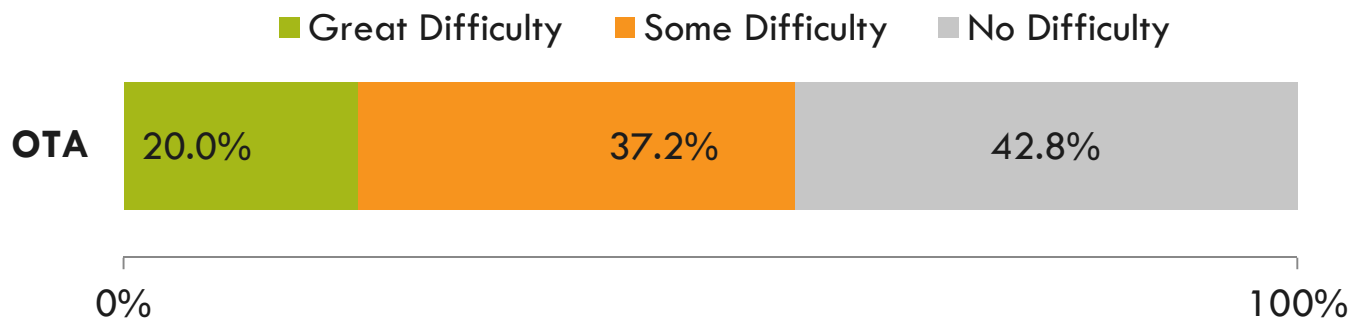
## Impact of MLT Licensure



# Occupational Therapy Assistants

OTA	COE (n=93)	%	CHA (n=21)	%
Current Employment	351		97	
Recent Job Growth/Decline			5	(5.6%)
Projected Job Growth	42	11.9%		
Vacancies	64	18.2%	2	2.2%

## Difficulty Finding Qualified Applicants



**Hospitals:**  
9 job openings  
for OTA at  
end of 2013

## Professional Development:

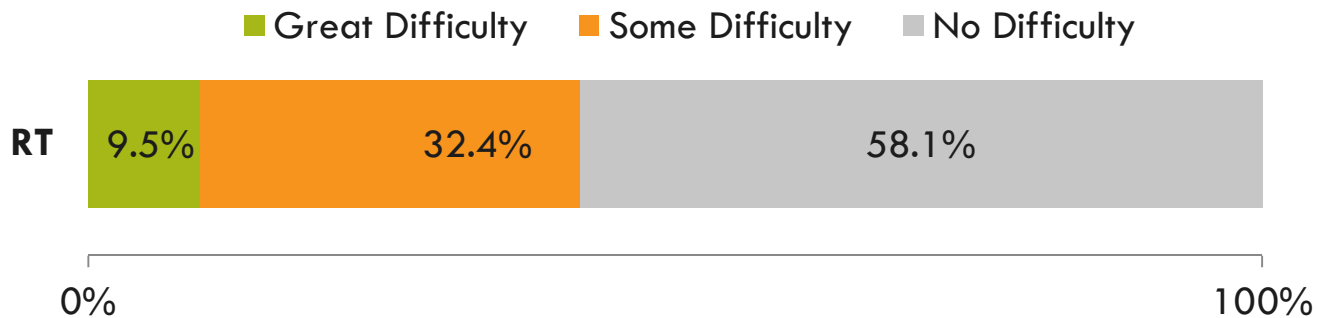
59% of COE employers surveyed provide access



# Respiratory Therapists

RT	COE (n=67)	%	CHA (n=132)	%
Current Employment	763		4,690	
Recent Job Growth/Decline			(75)	(1.6%)
Projected Job Growth	33	4.3%		
Vacancies	84	11.0%	59	1.3%

## Difficulty Finding Qualified Applicants



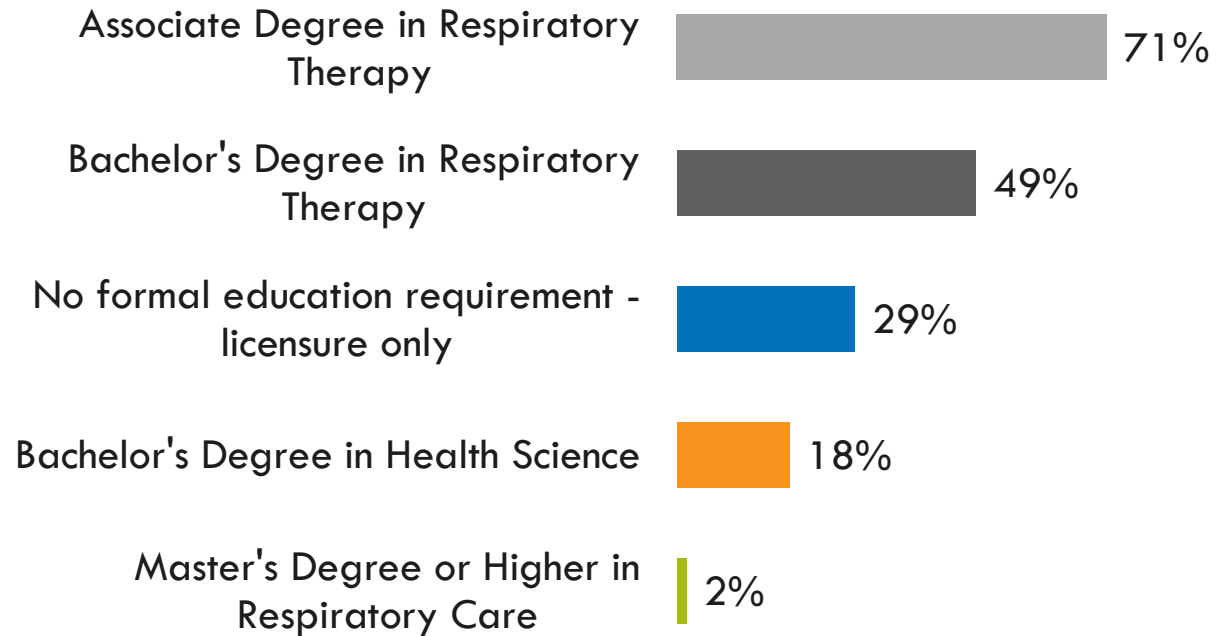
**Hospitals:**  
71 job openings  
for RTs at  
end of 2013

## Professional Development:

45% of COE employers surveyed provide access

# Respiratory Therapist

## Formal Education Requirements



- There are not enough RTs available on the local market due to limited educational opportunities
- The community colleges could offer continuing education course for a discounted rate if set up by our facility.
- The ability to think critically, the ability to communicate effectively, time management/prioritizing, ACLS certification, real-world, unpaid internship (90 days minimum)
- The colleges in our area of CA are very, very good about training the students who do come through here on rotations; they are prepared, well organized, enthusiastic, and very helpful.

# Employer Engagement

## Interested in ...

Providing internships for faculty professional development	381
Partnering with a program to provide a clinical training site for Healthcare programs	317
Providing input/advice on community college healthcare program curriculum	284
Participating in career or job fair activities	209
Providing clinical experience/internship for students	169



### **Honorable Mention** – Employers expressed some difficulty ...

Filling positions for X-ray Techs, Physical Therapists, Nurse Practitioners, Dietary Staff, Dental Staff, Surgical Technicians, Speech Therapists, Receptionists and Physicians...

Finding employees with bilingual skills, experience with developmentally disabled, willing to live in rural areas...

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# Next Steps

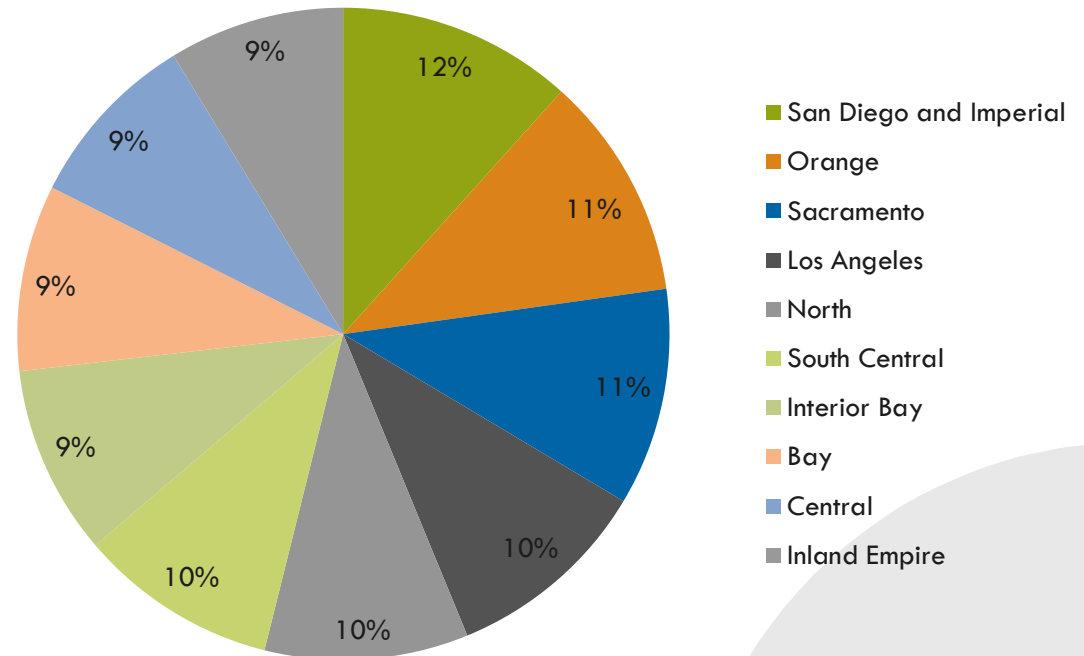
## Who is involved?

- COE regional directors
- Input from HWI and other stakeholders

## What is involved?

- Extrapolation and estimates
- Supply side information
- Data analysis
- Regional reporting
- Presentations

**COE survey completes by region**



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### What's New

**Solar Industry**  
In the Greater Sacramento region, solar industry employers expect to add more than 200 jobs over the next 12 months and about 950 jobs over the next three years. [More+](#)

**Agriculture Value Chain**  
Based on research of California employers, the estimated combined growth of occupations in the agriculture value chain over the next five years could exceed 180,000 jobs. Read the [Research Brief](#) or the [Environmental Scan](#).

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**Thank You!**

