

Key Findings, 2014

Health Occupations in California



Centers of Excellence Economic and Workforce Development California Community Colleges

The Centers of Excellence, in partnership with business and industry, deliver regional workforce research customized for community college program decision making and resource development.

The Health Occupations study is a joint project of the Centers of Excellence and the Health Workforce Initiative (HWI). For more information, go to:

www.coeccc.net/health



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Research Project

Healthcare is one of the largest employers in California, providing a wide range of well-paying career opportunities for residents. In 2014, the Centers of Excellence partnered with the Health Workforce Initiative (HWI) and the California Hospital Association (CHA) on two healthcare surveys to **assess workforce needs** at both state and regional levels. The surveys targeted three healthcare sectors:

- **Hospitals** provide medical, diagnostic, and treatment services to inpatients and some outpatient services.
- **Ambulatory Healthcare Services** provide healthcare services to outpatients in settings such as offices of physicians, outpatient care centers, and laboratories.
- **Nursing and Residential Care Facilities** provide residential care combined with either nursing, supervisory, or other types of care as needed.

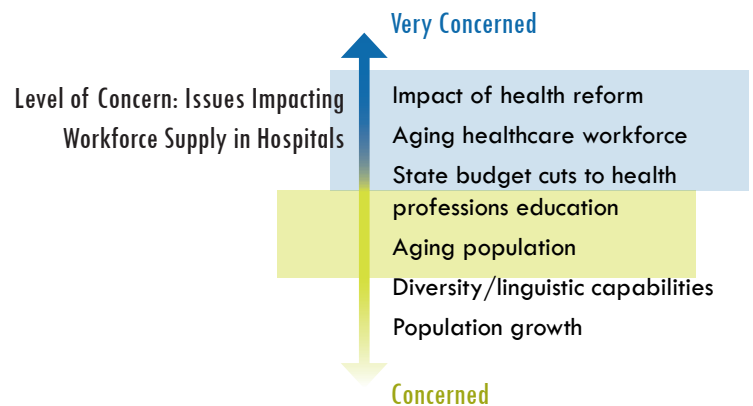
Employment Data

Each quarter, the California Hospital Association conducts a census of their membership to assess employment levels, vacancies and other metrics. Through an iterative process, CHA added workforce questions to their survey and aligned the tool to correspond with the COE's instrument for ambulatory and residential care facilities. Statewide, about 190 hospitals responded to the hospital survey and 1,600 clinics, labs and facilities responded to the ambulatory and residential care survey, providing an excellent sample to analyze healthcare workforce demand across the state and in several regions. The research focused on identifying: 1) labor market demand for key occupations in healthcare industries; 2) training supply supporting healthcare industries; and 3) key issues impacting supply and demand.

One in a series of reports profiling healthcare occupations in California, this key findings highlights data for ten allied health occupations: certified nursing assistants, healthcare social workers, home health aides, licensed vocational nurses, medical assistants, medical coders, medical laboratory technicians, occupational therapy assistants, physician assistants, and registered nurses.¹

Employer Challenges

The healthcare sector is facing a variety of factors that may have a direct impact on the workforce supply. Health reform is expanding coverage to thousands of uninsured residents, increasing demand for health care services across the board. The aging population will expand demand for certain types of services, creating additional need for skilled workers. **Across the state,** the majority of hospitals are most concerned that health reform, the aging hospital workforce and state budget cuts to health professions education will have a significant impact on the hospitals' ability to keep up with healthcare workforce demand.



Industry Employment by Healthcare Sector

In California, there are close to 80,000 healthcare establishments, employing as many as 1.4 million professionals across all occupational categories.²

- ✓ About 55% of employment is in the ambulatory care services subsector.
- ✓ One-quarter (26%) reside in general and various specialty hospitals.
- ✓ Another 19% falls within the nursing and residential care facilities subsector.

¹ Additional reports in this series, profiling six occupations in more detail, are available online. To access these reports and/or for more information about the methodology and approach, go to www.coecc.net/health.

² Source: Economic Modeling Specialists, 2014; 2013 industry employment totals for NAICS 621, 622 and 623.

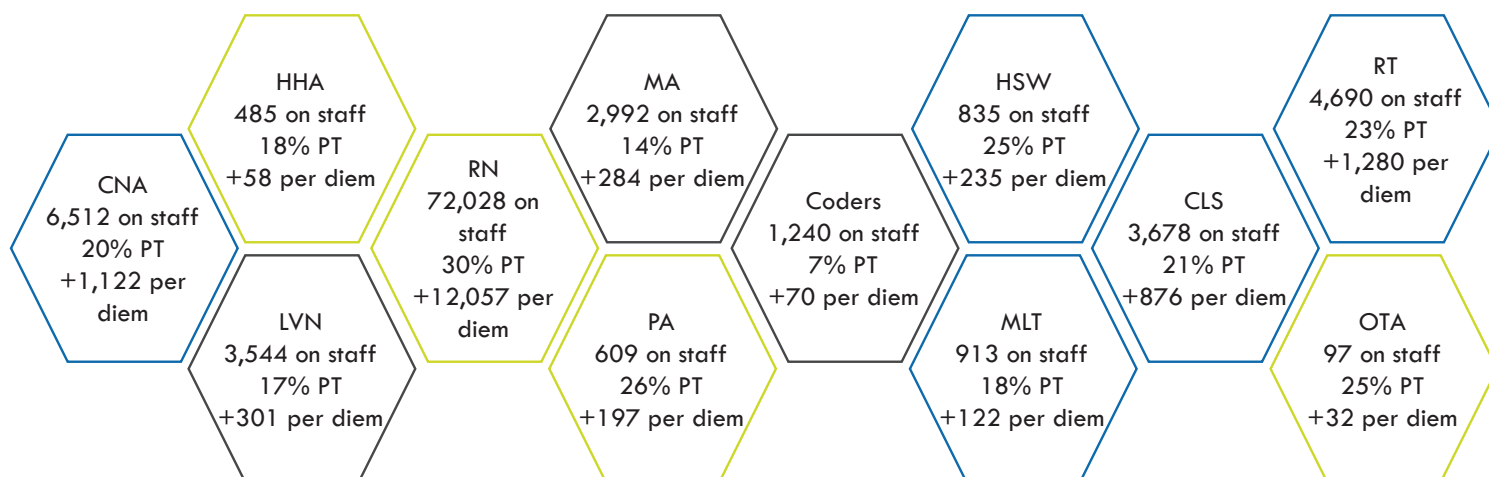
Occupational Employment

The following section contains the estimated employment data for twelve health occupations included in both survey efforts. Below, **ambulatory healthcare and nursing** and **residential care employers** were asked to detail their current employment, project future growth (new jobs), and estimate replacement jobs within the next 12 months. The data were extrapolated from these responses to approximate employment for the universe of employers in the region. The table is sorted by total openings.³

Occupations	2014 Employment	Projected Growth Rate	12-month Job Growth	Replacement Jobs	Total Openings (Growth + Replacements)
Certified Nursing Assistants (CNA)	94,850	17%	15,941	28,670	44,611
Home Health Aides (HHA)	50,825	27%	13,840	16,288	30,128
Licensed Vocational Nurses (LVN)	31,094	13%	4,018	10,384	14,402
Registered Nurses (RN)	23,618	12%	2,829	4,274	7,103
Medical Assistants (MA)	24,515	5%	1,234	3,504	4,750
Physician Assistants (PA)	8,105	11%	873	1,345	2,218
Medical Coders (Coders)	13,447	4%	472	1,676	2,175
Health Social Workers (HSW)	9,093	7%	614	1,421	2,042
Medical Laboratory Technicians (MLT)	5,607	6%	338	793	1,130
Clinical Laboratory Scientists (CLS)	6,253	--	--	954	954
Respiratory Therapists (RT)	5,725	4%	220	646	866
Occupational Therapy Assistants (OTA)	3,112	6%	176	528	705

Source: COE/HWI employer survey, 2014. Totals may not add due to rounding.

Hospital survey respondents provided information related to the current employment levels for each of the occupations studied, specific to the last quarter of 2013. In California, about 190 hospitals provided data. The totals below represent the combined employment numbers at these hospitals by occupation but do not estimate employment at the hospitals that did not participate in the study. Order from left to right consistent with table above.



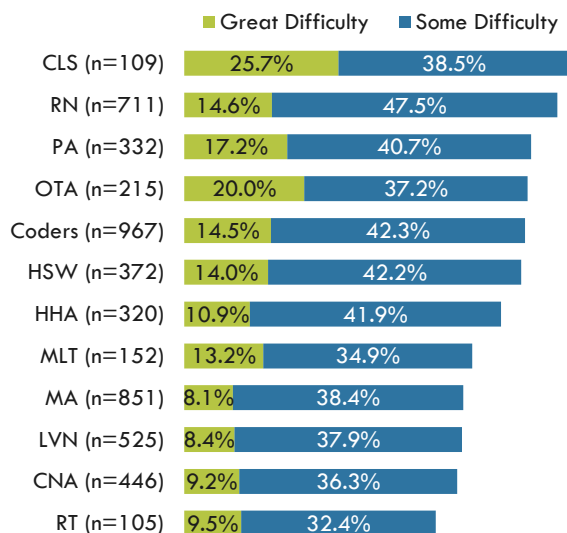
³ Important Disclaimer: All representations included in this report have been produced from survey data. Efforts have been made to qualify and validate the accuracy of the data and reported findings. Neither the Centers of Excellence (COE), Health Workforce Initiative (HWI), host districts, nor the California Community Colleges Chancellor's Office are responsible for applications or decisions made by recipients of this report based upon components or recommendations contained in this report.

Workforce Challenges

Ambulatory care and nursing and residential care employers indicated their level of difficulty in hiring entry-level applicants in the chart to the right; additionally, for some occupations, hospital employers were asked to rate their difficulty recruiting workers. Key findings include:

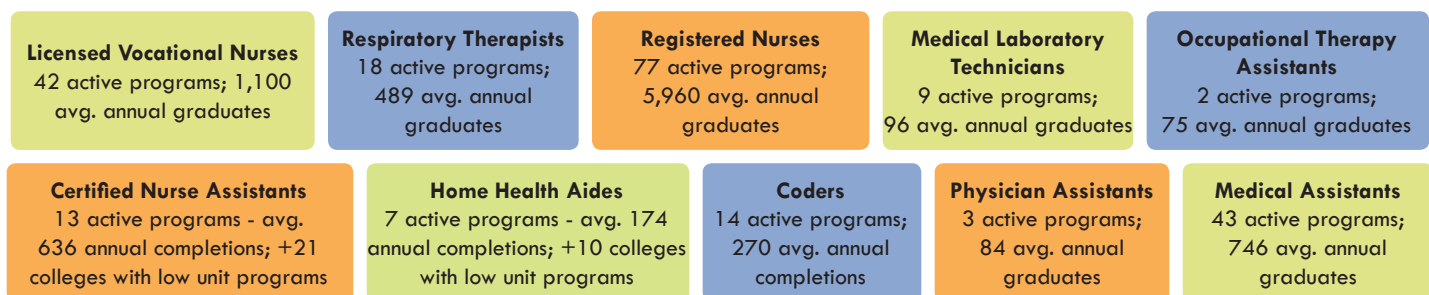
- Hiring **Clinical Laboratory Scientists** concerns both groups - 44% of hospitals and 64% of ambulatory care and nursing and residential care employers assigned some or great difficulty.
- Similarly with **coders**, 82% of hospitals indicated some or great difficulty compared to 57% of ambulatory care and nursing and residential care employers.
- For **LVNs** and **CNAs**, hospitals seem to have a much easier time finding applicants than ambulatory care and nursing and residential care employers - fewer than 20% of hospitals rated these difficult to fill occupations compared to more than 45% of ambulatory care and nursing and residential care employers.

Ambulatory Care & Nursing and Residential Care: Difficulty Finding Entry-Level Applicants



Education and Training

Healthcare employers are strong advocates for education and training, whether it is a program prior to employment in the allied health field, an ongoing component to stay current in the field, or a ladder/lattice within a career path. In ambulatory care and nursing and residential care, all of the occupations surveyed receive employer support for professional development – ranging from 46% of Medical Coder employers to 78% of LVN and HHA employers. The graphic below details community college program offerings associated with 10 of the 12 occupations in this study.



*Programs noted as “active” were listed in the CCC Chancellor’s Office Datamart as “approved” and as having awarded degrees or certificates in during the 2010-2011 to 2012-2013 period (three school year period). Low unit program totals were derived from regional lists of colleges compared against the approved and active program list.

For More Information

This document and others are available to download at www.coecc.net/health, including regional reports addressing employment and growth, employer hiring challenges, occupation-specific trends, and recommendations to colleges on addressing the workforce needs of healthcare employers. For more information on this study, contact:

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