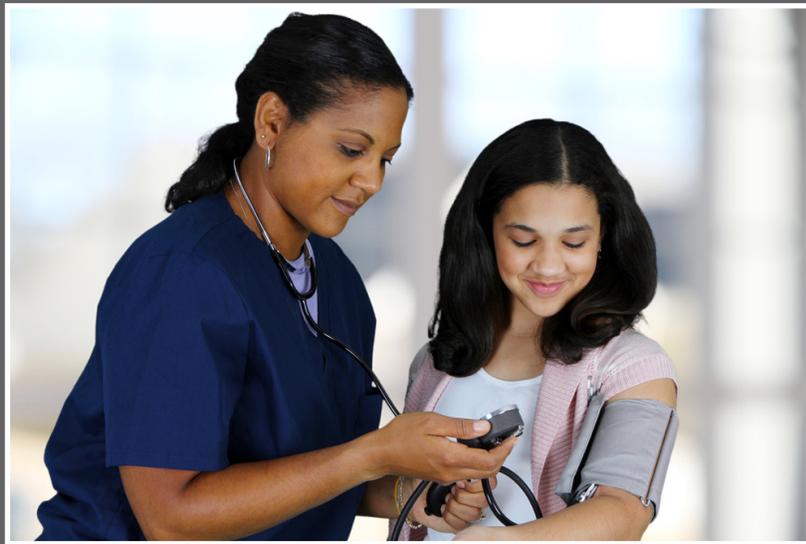


Key Findings, 2014

Health Occupations

in the South Central Coast Region



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 South Central Coast COE and the Health Workforce Initiative. For more information, go to:

www.coeccc.net/health



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Health Workforce Initiative

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**ECONOMIC &
WORKFORCE
DEVELOPMENT**
through the
CALIFORNIA
COMMUNITY
COLLEGES

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 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

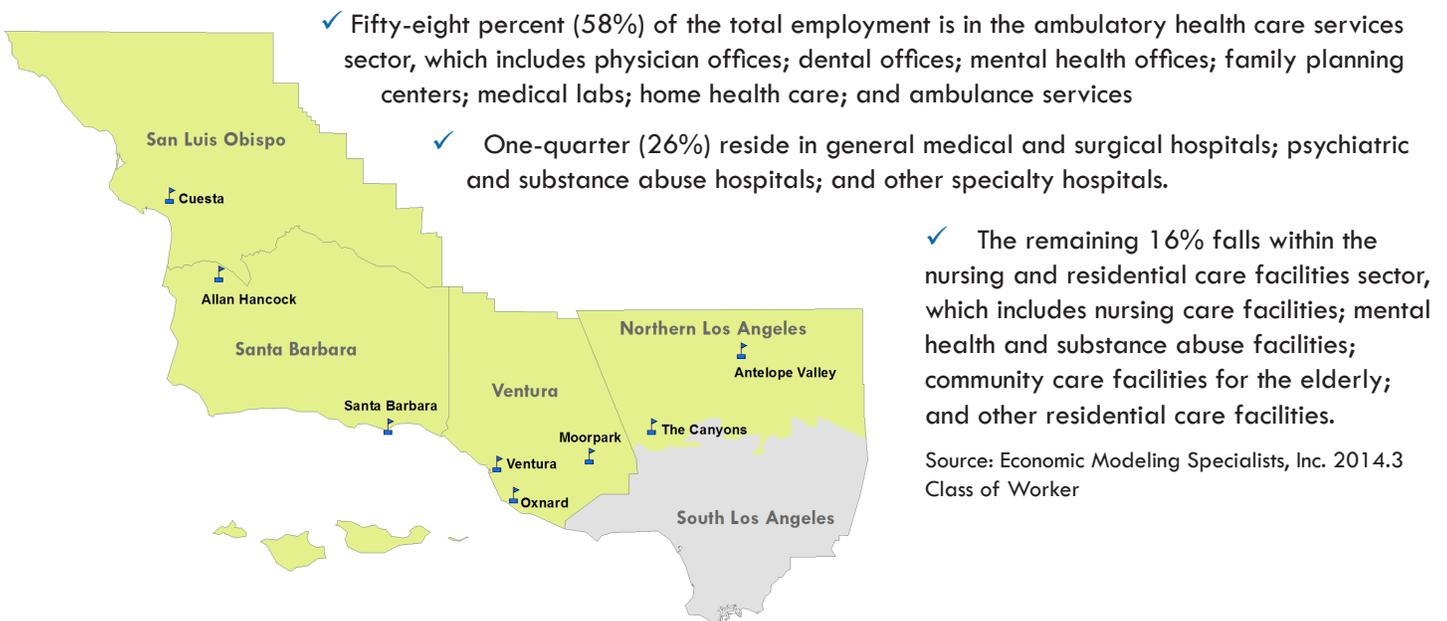
Each quarter, the California Hospital Association conducts a census of their membership to assess employment levels, vacancies and other metrics. Through an iterative process, CHA added workforce questions to their survey and aligned the tool to correspond with the COE's instrument for ambulatory and residential care facilities. Statewide, 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:

- labor market demand for registered nurses in healthcare industries
- training supply supporting healthcare industries
- key issues impacting supply and demand

One in a series of reports profiling healthcare occupations in the South Central Coast region, this key findings highlights data for eight allied health occupations: certified nursing assistants, licensed vocational nurses, medical assistants, registered nurses, medical coders, physician's assistants, healthcare social workers, and home health aides.¹

Industry Employment by Health Care Sector

In the South Central Coast region, there are more than 4,500 healthcare establishments, accounting for 73,000 jobs.



¹ The South Central Coast region is made up of three counties: San Luis Obispo, Santa Barbara and Ventura, and northern Los Angeles County (defined by zip code and including two community colleges). Over the next few months, additional reports in this series will be released, profiling each of these eight occupations in more detail. To access these reports and/or for more information about the methodology and approach, go to www.coeccc.net/health.

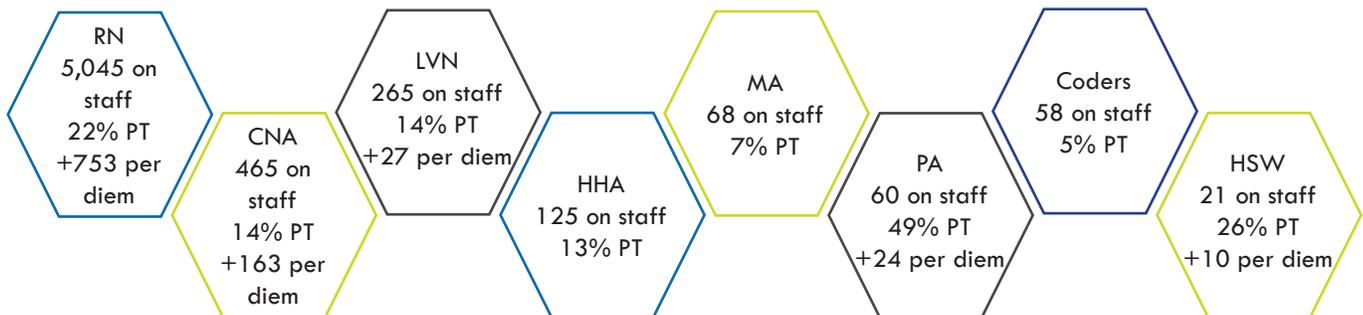
Occupational Employment

The following table contains the estimated employment data for the eight health occupations in the South Central Coast study. **Ambulatory healthcare and nursing** and **residential care employers** were asked to detail their current employment, project future growth within the next 12 months (new jobs), and estimate replacement jobs. The data below are extrapolated from the sample responses to approximate the universe of these employers in the region.²

| Occupations | 2014 Employment | 12-month Job Growth | Replacement Jobs | Total Openings (Growth + Replacements) |
|----------------------------------|-----------------|---------------------|------------------|--|
| Certified Nurse Assistants (CNA) | 3,477 | 744 | 717 | 1,461 |
| Home Health Aides (HHA) | 2,771 | 592 | 825 | 1,417 |
| Medical Assistants (MA) | 2,231 | 93 | 305 | 398 |
| Licensed Vocational Nurses (LVN) | 1,210 | 87 | 177 | 264 |
| Registered Nurses (RN) | 1,201 | 87 | 161 | 248 |
| Medical Coders (Coders) | 942 | 9 | 109 | 118 |
| Physician Assistants (PA) | 389 | 54 | 7 | 61 |
| Healthcare Social Workers (HSW) | 326 | 0 | 31 | 31 |

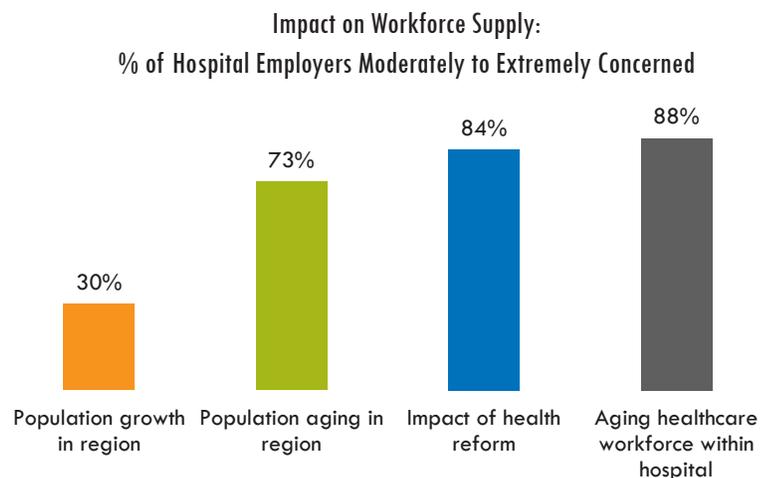
Source: COE/HWI employer survey, 2014.

Hospital survey respondents provided information related to the current employment levels for each of the occupations studied. In the South Central region, 17 hospitals provided data; the totals below represent the sample's employment by occupation moving in to 2014, but was not extrapolated to approximate the universe of hospital employment.



Employer Challenges

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

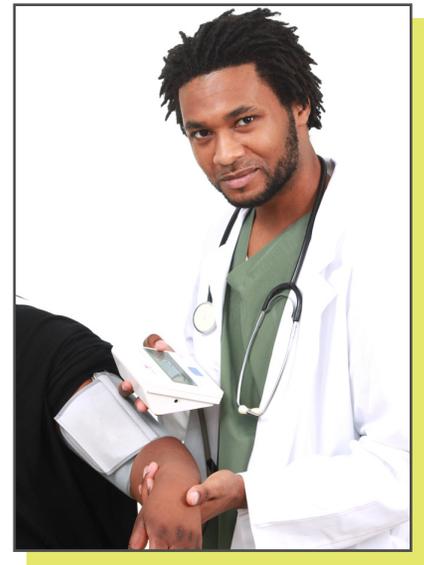


² Important Disclaimer: All representations included in this report have been produced from survey data. Efforts have been made to qualify and validate the accuracy of the data and reported findings. Neither the Centers of Excellence (COE), Health Workforce Initiative (HWI), host districts, nor the California 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 each occupation. Key findings include:

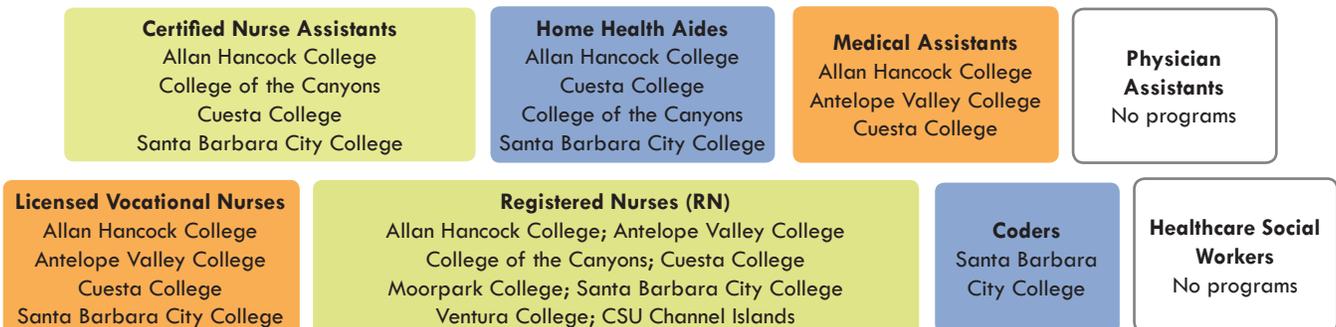
- **Physician assistants** are a small but in-demand occupation, with 14% new job growth anticipated by employers. Three out of four employers surveyed reported difficulty finding entry-level applicants for this occupation (75%).
- **Registered nurse** employment levels may be lower than in these sectors than in the hospital sector; however, annual openings are estimated at more than 240 through 2016. One-quarter of employers reported great difficulty finding entry-level applicants for RN positions; while 42% reported some difficulty.
- **Certified nursing assistants** have the largest projected demand in ambulatory care and nursing and residential care sectors. Close to half of the employers surveyed reported difficulty finding entry-level applicants for this occupation (47%).



Education and Training

Healthcare sectors are strong advocates for education and training whether it is prior to employment in the allied health field, as an ongoing component to stay current in the field, and as a ladder or lattice within a career path. In ambulatory care and nursing and residential care, all of the occupations surveyed receive employer support of some sort for professional development – ranging from 40% of CNA employers to 83% of HHA employers.

The graphic below details the South Central Coast region’s public postsecondary program offerings associated with the eight occupations profiled in this study.



For More Information

This document and others are available to download at www.coecc.net/health. More detailed occupational profiles include occupational employment and growth, employer hiring challenges, occupation-specific trends, and recommendations to colleges on addressing the workforce needs of healthcare employers.

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