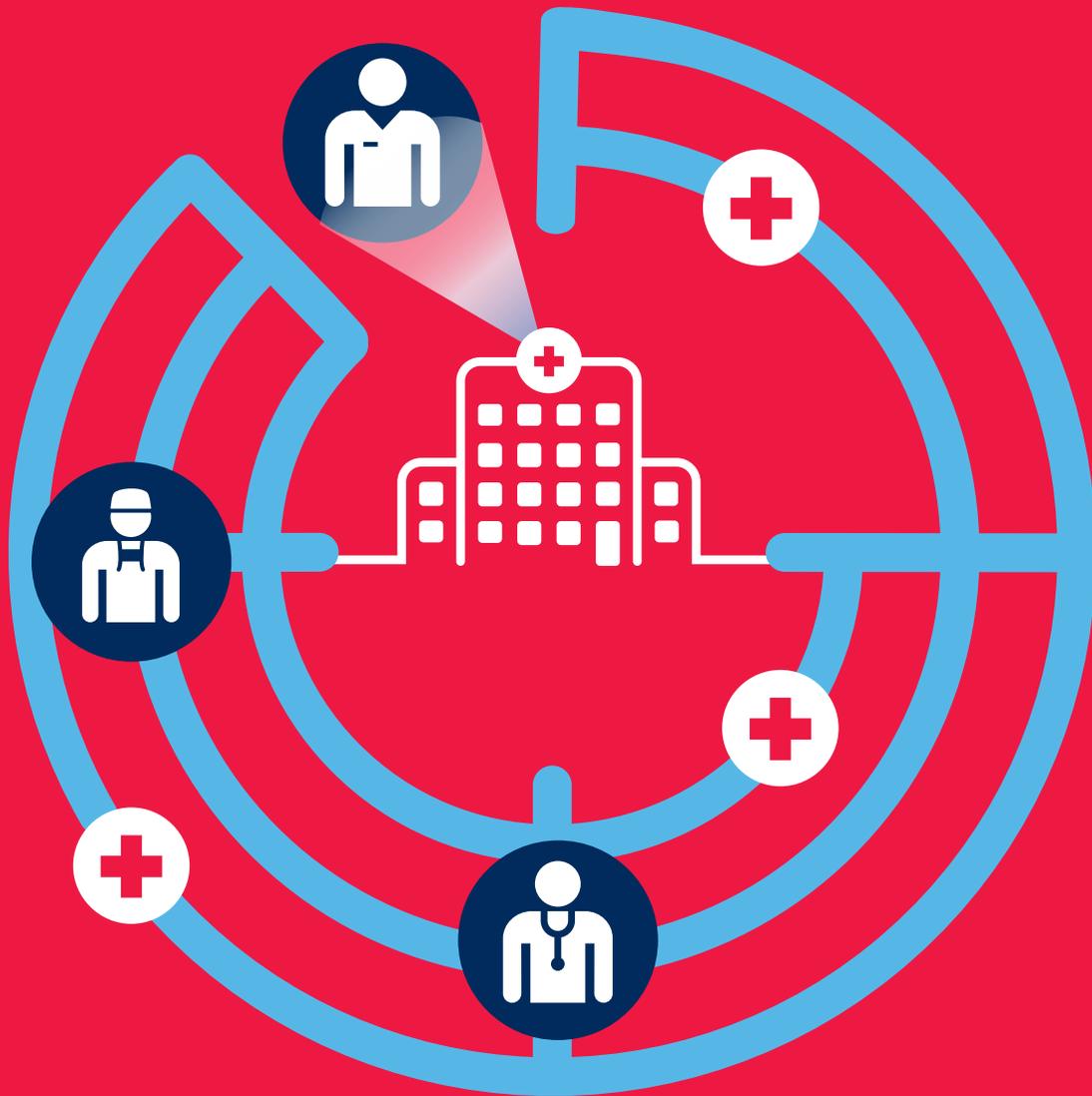


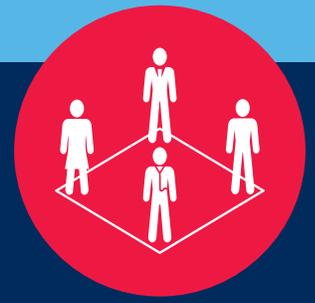
# 2017 Healthcare

## TALENT SCAN



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## Welcome to the [HealthCareerCenter.com](https://www.healthcareercenter.com) Talent Scan

### Our annual snapshot of America's healthcare employment landscape

Each year, we bring together research findings from the field's most trusted sources to keep you up-to-date on the staffing trends and evolving dynamics that are shaping the healthcare talent landscape.

Read on for critical insights and information that you can use to guide your organization to a successful path forward in 2017 and beyond. And if you have feedback on your own healthcare talent acquisition challenges, we invite you to share them on our blog and LinkedIn page.

## A BIRD'S EYE VIEW: Where Healthcare Is Headed Next

### **Healthcare reform and retiring physicians are changing the shape of primary care teams.**

All hospitals are dealing with the rapid pace of change when it comes to reformative healthcare policies. But primary care providers face an additional challenge: a shortage of physician leaders. Baby boomer physicians are retiring just as the rest of their generation's care needs are rising. To satisfy demand, primary care teams' approach to care will evolve—and HR managers will have to look for leadership qualities at all levels. Find out more on [page 4](#).

### **Telemedicine is picking up steam at all care levels.**

Convenience of treatment is key to the quality of care we provide to patients. Telemedicine and data-sharing technology is already improving the health of communities by making patient information and treatment advice easier to access. Check out [page 5](#) to see how government legislation and employee benefit packages will help telemedicine gain even more popularity in the coming year.

### **America's hospitals are addressing behavioral health challenges.**

Integrating behavioral health into the care continuum doesn't just allow hospitals to offer more holistic care to individual patients. It also creates opportunities for improved value, and promotes overall health throughout their entire community. Find out how hospitals will leverage behavioral health services to meet the Triple Aim this year on [page 5](#).

### **More hospitals are starting to adopt consumer engagement strategies.**

Health systems now recognize the importance of customer relationship management. But are they making any real, tangible strides in their consumerism efforts? Find out on [page 6](#), and learn how hospitals of all sizes can put together a cost-effective patient satisfaction strategy, starting with how leadership recognizes and rewards its most talented performers.

### **Health systems and universities are finding smarter ways to coordinate care.**

Specialization will start to take a backseat to collaboration in 2017. That means more caregivers taking on leadership roles at all levels in healthcare, and an increased focus on peripheral services like dental and behavioral care. Read our [page 7](#) highlights on care coordination to see how hospitals and universities are preparing tomorrow's care providers to take on more responsibility than ever before.

## NEXT UP: Primary Care

Physician numbers are dropping, while expectations for care are rising. This is creating a variety of growing challenges for primary care practices over the next few years.

### **Demand for physicians will grow as more of them retire.<sup>1</sup>**

According to one study, the shortage of physicians will rise from fewer than 62,000 to more than 94,000 by 2025 (with a shortage of over 35,000 in primary care alone). Most of this shortfall will be driven by an unprecedented number of physicians retiring, with nearly one-third of doctors reaching retirement age during the next decade. Physicians between the ages of 55 and 74 already make up 37 percent of the workforce.

### **Primary care teams will broaden, and rely less on physicians.<sup>2</sup>**

The growing physician shortage mentioned above means that other care providers will be challenged to pick up the slack, and gain a better understanding of patients and their unique preferences. Because it's impossible for the short supply of physicians to keep track of consumers' medical, social and behavioral health needs on their own, the responsibility will be spread out across entire teams.

### **Data analytics will help drive improved performance and reduced costs.<sup>2,3</sup>**

Pay-for-performance models are gaining acceptance fast, and hospitals are seeking to avoid unnecessary costs whenever possible. This combination of factors has led to more widespread adoption of data analysis technology, which hospitals are leveraging in all sorts of exciting ways. That includes boosting care efficiency, optimizing staffing approaches, and streamlining management, just to name a few.

### **MACRA will put an additional emphasis on “value vs. volume” in care.<sup>4</sup>**

MACRA's Merit-based Incentive Payment System (or MIPS for short) officially kicked off at the start of the year. From now on, physicians will have a different set of criteria that determines their payment adjustments. These will include quality, resource use, and advancing care information — as well as clinical practice improvement activities, an all-new category designed to measure performance more accurately.



**According to one study, the shortage of physicians will rise from fewer than 62,000 to more than 94,000 by 2025 (with a shortage of over 35,000 in primary care alone).**

## NEXT UP: Telemedicine

Consumer demand is driving a revolution in remote healthcare services, to the benefit of patients, employers, and the economy.

### **Technology will bring caregivers and patients closer than ever.**

Mobile devices are continuing to gain acceptance for a variety of healthcare uses, from ordering prescriptions to replacing in-office visits entirely. Though security of sensitive patient information will continue to be a hot-button issue, you can expect the number of clinicians providing care virtually to continue to rise this year.

### **The people have spoken: they want telemedicine.<sup>3</sup>**

According to a recent survey, 64 percent of Americans are willing to have doctor visits via video. Congress has also heard the call, introducing over 200 pieces of telemedicine-related legislation across 42 states in 2015 alone. Now, 29 states as well as the District of Columbia, have made it a legal requirement for health plans to cover telemedicine.

### **...and their employers are giving them what they want.<sup>3</sup>**

Nearly 3 out of 4 companies now offer telemedicine services as an official employee benefit. This includes the 35 percent of employers that offer telemedicine services onsite, which is expected to surpass 47 percent in the coming year. Altogether, the global telemedicine market is expected to grow at a compound annual rate of 14.3 percent, more than doubling from 2014 to 2020.

## NEXT UP: Behavioral Health

It's no longer a question that mental health is vital to the pursuit of the Triple Aim. Here's how hospitals are changing their strategies to bring behavioral medicine to the forefront.

### **Hospitals will improve the patient experience by integrating behavioral health.<sup>5</sup>**

This year forecasters believe that hospitals will begin including behavioral medicine as a core piece of the overall health puzzle. Watch for more hospitals to start integrating specialists from behavioral and physical healthcare, and create unified teams that offer holistic care to every patient.

### **More hospitals will partner with their communities to advance population health.<sup>5</sup>**

By working closely with community stakeholders, hospitals will continue to further the Triple Aim mission of promoting healthier populations. Though organizations across the country have many different ideas and strategies for how this can be accomplished, most agree that buy-in from local leaders will be key to helping patients and their families adopt a culture of wellness and prevention.

### **An increased focus on behavioral health will reduce hospital readmissions.<sup>5</sup>**

You don't have to look hard to see the link between better behavioral health and lower readmissions costs. When patients' behavioral needs are taken care of, they're better able to manage illnesses and avoid readmissions—which helps everyone's bottom line.

## **NEXT UP: Consumerism**

To succeed in today's consumer-driven world, hospitals will have to take significant steps to improve customer satisfaction. However, many still aren't sure how to create consumer-centric strategies and act on them.

### **Most hospitals agree consumerism matters—but aren't doing anything about it.<sup>6</sup>**

One recent report shows that two out of three hospitals view consumerism as a high-priority strategic initiative. Less than one-fourth of those same hospitals feel like they have the data or insights necessary to implement consumer strategies.

### **More hospitals will start moving consumerism up on their priorities list.<sup>6</sup>**

Because a clear link between customer satisfaction and hospital performance has already been established, experts think 2017 will be a year when C-Suite executives make big strides in developing consumer-centric strategies, starting with hiring and retaining top-level talent.

### **Smart hospitals will start small.<sup>6</sup>**

Implementing a consumerism strategy is no easy task—but the good news is, it doesn't have to be handled all at once. One consulting firm believes that hospitals will start with general data audits, before setting out to tackle one or two initiatives at a time. This will not only help them avoid spreading their resources too thin, but will also help ensure that any lessons learned along the way can be applied to initiatives that come later.

## NEXT UP: Care Coordination

New care models depend on our ability to coordinate care in ways we never have before. How are our universities and hospitals preparing the next generation of caregivers?

### Medical schools and training programs will put more emphasis on collaboration.<sup>7</sup>

For as long as we can remember, healthcare professionals have used specialization as a way to improve the quality of patient care. But while this hyper-focused approach has led to important breakthroughs in certain disciplines, it's also created siloes that limit caregiver interaction and care coordination. Look for change to start at the university level, with more schools highlighting collaboration in 2017 and beyond.

### SIX key training functions will drive better coordination for the future.<sup>7</sup>

Colleges and other medical training institutes are already revamping their programs to teach successful team functioning. In one large-scale survey, researchers found that most of these institutions offer some combination of classes in **SIX AREAS**:



**COMMUNICATION**



**DELEGATION**



**ROLE OVERLAP**



**SUPERVISION**



**CONFLICT RESOLUTION**



**COLLABORATION**

*Experts predict that such classes will soon become the norm.*

### Oral and behavioral care will climb in the primary care hierarchy.<sup>7</sup>

We've already discussed how hospitals are stressing the importance of behavioral health (see [page 5](#)). As researchers find more links between gum disease and serious health problems like diabetes and heart attack, doctors will place added emphasis on oral care for long-term health—and take greater steps to coordinate dental care with overall care strategies.

## FROM THE CANDIDATE'S PERSPECTIVE: Recruitment Marketplace Overview<sup>8</sup>

Observations and statistics on the state of the healthcare recruitment marketplace, derived from the 2017 HealthCareerCenter.com Job Search Insights Survey.

### **Online job boards and referrals are candidates' most-used job search resources.**

**78%** of surveyed candidates use online job boards

**64%** use referrals from friends/colleagues

**42%** use company websites

### **Millennials rely on job boards too – but are more likely to use personal referrals over company websites.**

**80%** of surveyed millennials use online job boards

**58%** use family/friend connections

**57%** use company websites

### **Candidates want to see as many details as possible in your job descriptions.**

**69%** want specific information on roles within the organization

**57%** company reviews from current or former employees

**46%** information on organization's leadership and team

### **Ease of application is essential.**

**38%** of surveyed candidates said they are likely to not apply for a job because of a difficult application process.

### **Staying in touch with former colleagues is a great way to network, but engaging with recruiters and membership in professional societies are catching up.**

**24%** keeping in touch with former colleagues

**17%** engaging with recruiters

**17%** membership in professional societies and associations

### **When evaluating job offers, candidates prioritize compensation and benefits. Beyond that they mostly care about...**

**60%** flexible hours/scheduling

**58%** clear long-term growth opportunities

**45%** training and development programs

## ...Millennials, on the other hand, care more about clear long-term growth opportunities

- 69% flexible hours/scheduling
- 65% clear long-term growth opportunities
- 54% training and development programs
- 30% perceptions of the hiring manager and/or team

## And finally, most candidates are optimistic about finding success in the 2017 job market.

- 30% are "very optimistic" they can find a job
- 29% are "somewhat optimistic"
- 30% are "neutral"

### Who participated in this survey?

Take a look at a break down of the candidates' profiles

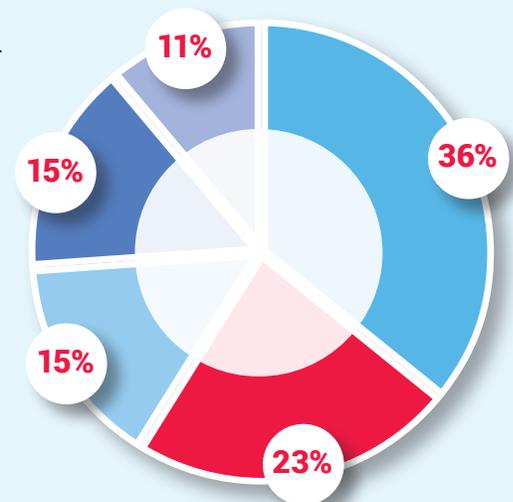
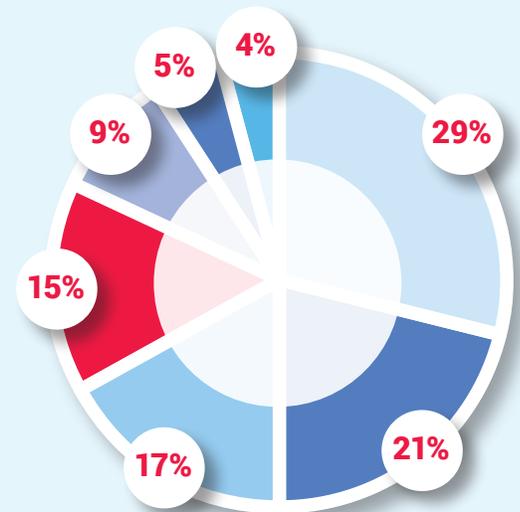
- 29% Nursing & Nursing Support
- 17% Operations, Risk Management, Executive
- 15% Administrative/clerical
- 9% Allied health
- 5% Mental health/social services
- 4% Information technology
- 21% Other

"Other" includes academic/research, advanced practice nurses/physician assistants, hospitality/facility/environmental support, pharmacy, and more.

Participants have a high level of experience and education

#### Experience in discipline

- 20+ years – 36%
- 10-19 years – 23%
- 6-9 years – 15%
- 3-5 years – 15%
- 0-2 years – 11%



## HEALTHCARE WORKFORCE OVERVIEW<sup>9</sup>

A by-the-numbers look at the state of healthcare hiring today, and how those trends change throughout the country.



**150 million**

Total job candidates in the U.S.



**13.24%**

of total job candidates are in healthcare



**90**

The number of candidates per every healthcare job opening

### Top 10 most in-demand healthcare positions (past 4 years)

- |                             |                                |                  |
|-----------------------------|--------------------------------|------------------|
| 1. Registered Nurse         | 5. Certified Nursing Assistant | 8. Nurse         |
| 2. Physical Therapist       | 6. Occupational Therapist      | 9. Phlebotomist  |
| 3. Licensed Practical Nurse | 7. Nursing Assistant           | 10. Receptionist |
| 4. Medical Assistant        |                                |                  |

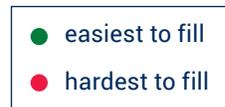
### Healthcare Hiring Demand\*

#### States where it's easiest to fill healthcare positions

1. Ohio
2. New Jersey
3. Indiana
4. Connecticut
5. Pennsylvania

#### States where it's hardest to fill healthcare positions

1. Alaska
2. Colorado
3. Washington
4. New Mexico
5. Maine



\*Difficulty level of filling a position is based on:

- Supply (the number of candidates available)
- Demand (the number of open positions)
- Salary (published level of pay in a job ad)
- Average Posting Period (number of days a job ad is posted on an a job board)
- Job Board Source (free vs paid job postings, local/regional vs national)
- Unemployment Rates (updated monthly with most recent unemployment rates)

## POSITION SNAPSHOT: Physicians<sup>9</sup>

A brief look at key statistics behind the hiring landscape for Physicians, Physician Assistants, Internal Medicine Physicians, Family Practice Physicians, Hospitalists and more.



**334,000**

Physician job candidates in the U.S.



**1.68%**

of total healthcare job candidates are physicians



**14**

The number of candidates per every physician job opening



**91-163 days<sup>10</sup>**

How long the average physician job opening lasts before being filled

### Top 10 most in-demand physician specialties



**1. Pediatrics**



**5. Ambulatory Surgery**



**8. Cardiac Care**



**2. Critical Care**



**6. Emergency Room**



**9. Medical-Surgical Nursing**



**3. Geriatrics**



**7. Immunology**



**10. Cardiac Rehabilitation**



**4. Behavioral Health**

### Healthcare Hiring Demand\*

#### States where it's easiest to fill physician positions

1. Rhode Island
2. New Jersey
3. Washington D.C.
4. Maryland
5. New York

#### States where it's hardest to fill physician positions

1. North Dakota
2. South Dakota
3. Alaska
4. Wyoming
5. New Mexico



● easiest to fill  
● hardest to fill

\* Difficulty level of filling a position is based on :

- Supply (the number of candidates available)
- Demand (the number of open positions)
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- Unemployment Rates (updated monthly with most recent unemployment rates)

## POSITION SNAPSHOT: Registered Nurses (RNs)<sup>9</sup>

Important statistics regarding the employment prospects of RNs across America.



**2.9 million**

RN job candidates in the U.S.



**14.8%**

of total healthcare job candidates are RNs



**11**

The number of candidates per every RN job opening



**50 days**

How long the average RN job opening lasts before being filled

### Top 10 most in-demand RN specialties



**1. Pediatrics**



**5. Emergency Room**



**8. Cardiac Care**



**2. Critical Care**



**6. Behavioral Health**



**9. Acute Rehabilitation**



**3. Medical-Surgical Nursing**



**7. Labor and Delivery**



**10. Cardiac Rehabilitation**



**4. Geriatrics**

### Healthcare Hiring Demand\*

#### States where it's easiest to fill RN positions

1. Hawaii
2. Ohio
3. Mississippi
4. Illinois
5. West Virginia

#### States where it's hardest to fill RN positions

1. Alaska
2. Colorado
3. Washington
4. Arizona
5. Nevada



● easiest to fill  
● hardest to fill

\* Difficulty level of filling a position is based on:

- Supply (the number of candidates available)
- Demand (the number of open positions)
- Salary (published level of pay in a job ad)
- Average Posting Period (number of days a job ad is posted on an a job board)
- Job Board Source (free vs paid job postings, local/regional vs national)
- Unemployment Rates (updated monthly with most recent unemployment rates)

## POSITION SNAPSHOT: Psychiatrists<sup>9</sup>

Key statistics behind the job marketplace for Psychiatrists.



**28,000**

Psychiatrists job candidates in the U.S.



**0.14%**

of total healthcare job candidates are psychiatrists



**1**

The number of candidates per every psychiatrist job opening



**67 days**

How long the average psychiatrist job opening lasts before being filled

### Top 10 most in-demand psychiatrist specialties



**1.** Behavioral Health



**2.** Geriatrics



**3.** Pediatrics



**4.** Crisis Intervention



**5.** Emergency room



**6.** Medical-Surgical Nursing



**7.** Autism spectrum disorders



**8.** Critical care



**9.** Cardiac care



**10.** Trauma care

### Healthcare Hiring Demand\*

#### States where it's easiest to fill psychiatrist positions

1. New Jersey
2. Connecticut
3. New York
4. Rhode Island
5. California

#### States where it's hardest to fill psychiatrist positions

1. Wyoming
2. New Mexico
3. Montana
4. Nevada
5. Alaska



● easiest to fill  
● hardest to fill

\* Difficulty level of filling a position is based on:

- Supply (the number of candidates available)
- Demand (the number of open positions)
- Salary (published level of pay in a job ad)
- Average Posting Period (number of days a job ad is posted on an a job board)
- Job Board Source (free vs paid job postings, local/regional vs national)
- Unemployment Rates (updated monthly with most recent unemployment rates)

## THE EXPERTS WEIGH IN...



**GARY PASTORE, CHHR, MSL**

*Director of Human Resources, HonorHealth Shea Medical Center, Scottsdale, AZ, 2017 President, American Society of Healthcare Human Resources Administration*

How are HR leaders thinking differently (or working differently) as our organizations move to value-based care system?

This starts with population health. We are looking differently at how people enter our system to receive care. So a lot of that is bolstering our clinics, as the first recipients of our patients' care.

Moving from volume to value has been a process. For a long time we've had a foot in each camp, and in some cases we still do. So it's a matter of balancing where volume and value seem to come in conflict and making sure the patient experience is foremost in what we do, along with good clinical outcomes.

The education of staff is key when examining value. As an organization, it's our responsibility to educate our staff on how HCAHPS scores work, what they mean, what we mean by value, what we mean by the patient experience and to focus on those attributes to make sure the patient has an optimum experience. Patient experience doesn't just fall on the shoulders of our clinical staff, it's the patient experience they have the moment they set foot into our facility.



**M. TOMÁS LEÓN, MBA**

*President and CEO, Institute for Diversity in Health Management, American Hospital Association, Chicago, Illinois*

What is your perspective on diversity in the healthcare workforce and how it will be impacted by changes in the field?

A new reality in health care is here. Quality, cost, equity, diversity, and community health are inextricably linked. Health care organizations are challenged to create a high-performance organization and culturally competent workforce to meet the current health care needs and changing U.S. sociodemographic trends. The growth path will require a deeper understanding of data analytics, cultural and linguistic requirements and inclusive leadership and governance competencies to gain a competitive advantage.

Advancing the diversity of the health care workforce is a business imperative and essential to ensure equitable, culturally competent care for all persons in every community. A diverse health care workforce will help to expand health care access for vulnerable populations, foster greater inclusion and innovation in the workplace and enrich the community benefit.

The long-term solution to achieving diversity in the health professions and creating a competitive edge depends on an organization's intentional strategies designed to attract, recruit, hire and develop the most diverse talent at all levels of the care continuum, including leadership.



**MAUREEN SWICK, RN, PH.D**

*Chief Executive Officer, American Organization of Nurse Executives (AONE),  
Senior Vice President, Nursing, American Hospital Association,  
Chicago, Illinois*

What are AHA's strategic priorities for shaping the workforce in the future?

AHA's 2017 strategic priorities for shaping the workforce in the future is to disseminate the 2016 Committee on Performance Improvement's report on "Imperatives for Strategic Workforce Planning and Assessment: Challenges and Opportunities."

This report stresses the need for leadership to include workforce planning and development as a key strategic priority for hospitals and health systems. The CPI engaged hospital leaders and experts in the field to identify workforce challenges as well as identify and showcase best practices addressing some of these challenges.

Additional AHA strategic priorities will be to identify new competencies related to team-based care, strengthen and expand the physician workforce, showcase the value of workforce diversity and expand the AHA's Workforce Center's ability to provide valuable resources to our members.



**RACHELLE DAUGHERTY, MPH**

*Senior Director of Physician Services & Development,  
Providence Health & Services, Seattle, Washington*

How has physician recruitment changed and how will it continue to change as we see primary care teams shift and healthcare continue to move toward value-based care?

Providence Health & Services has seen incredible changes in physician recruitment over the last decade. The two most significant factors have been the ever-accelerating under-supply of physicians, and major pushes for increased access and value-based care as required by the ACA. These factors have completely changed the business model in some very tangible ways for groups responsible for physician staffing. For Providence, even "physician staffing" has changed; we now recruit almost as many advanced practice clinicians (APCs) as physicians, up from only 10 percent ten years ago.

Similarly, we are in the midst of a massive transformation from "treating disease" to "creating wellness." We consider our primary care providers true "specialists" in this new vision of care, and have evolved how we recruit for them. Compensation models in use here incent patient panel wellness rather than focusing solely on the number of tests and procedures performed.

And, we continue to innovate to expand access. Tele-medicine extends quality care to rural communities; e-visits and home visits create convenience for patients; "retail" setting clinics give access to care in the right setting at the right price at the right time.

Fortunately for us, we have found that providers, in particular those coming out of training today, are excited by these advances and eager to take part. Their passion is quite infectious and it has been extremely rewarding for our department to feel part of this massive shift in how we provide care in America. Summoning our marketing tagline, "We are creating healthier communities, together!"



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## About HealthCareerCenter.com

HealthCareerCenter.com is brought to you by the American Hospital Association to connect health care employers and top talent in all disciplines through its online job board network.

**Employers:** Broaden your job posting reach through a gateway to 3 million members of more than 330 prestigious health care professional associations and societies as part of the National Healthcare Career Network.

**Health care professionals:** Access thousands of job opportunities from high-quality employers and benefit from career development tools and resources.

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### Suggestions?

Do you have a request about what type of information you'd like to see in next year's report? Email us at [careercenter@aha.org](mailto:careercenter@aha.org).

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