2016
Healthcare Talent Scan

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Table of Contents

Welcome to the HealthCareerCenter.com Talent Scan

Our annual snapshot of America's healthcare employment landscape

We've created this report to help you better understand the challenges and opportunities facing the field—how they've changed over the past year, and how you can expect them to change in the future. It is based on research and findings from some our field's most trusted sources.

We hope it helps you make smart, informed decisions, and set your organization up for success in 2016 and beyond. We welcome your feedback on healthcare talent acquisition challenges on our blog and our LinkedIn page.

A Bird's Eye View:
Where Healthcare Is Headed Next

**Physician assistant and nursing talent is on the rise.[1]**
Surveys show that the number of primary care nurse practitioners will increase by 30 percent during the next 5 years. Physician assistants will see an even larger workforce boom over that same time span, growing by about 58 percent.

Workers with high levels of career flexibility will see their stock soar.[2]
As the health care landscape continues to change, HR personnel are on the hunt for professionals with a wide range of clinical skills. The ideal candidate will help drive health system transformation through a combination of expertise in preventive medicine, team-based care, best practice data, and care process and coordination.

More physician practices will be integrated into health systems.[1]
With the ongoing shift to more accountable care delivery systems, the number of physicians partnering with hospitals will continue to grow. This trend is leading to new challenges for hospitals as they look for ways to engage these physicians in new roles, organizational governance and more.
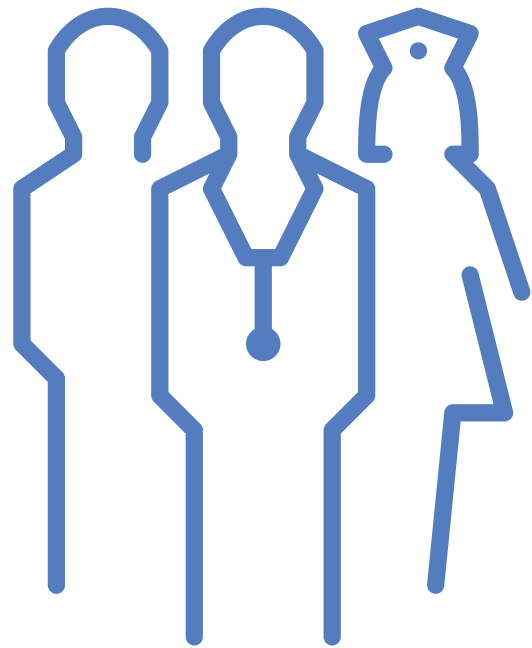
Next up: Telemedicine

Technological advances will continue to create opportunities for more effective remote patient monitoring and care delivery.

Video consultations are poised to explode in popularity.[1]
According to Geisinger, telemonitoring of patients has improved overall care efficiency and delivered 3.3 times the return on their original investment. Examples like this are why experts believe that video consultations will grow from 5.7 million in 2014 to 130 million by 2018. That's an increase of more than 2,200 percent.

The fast growth in telemedicine is fueled by patient demand.[3]
Thirty percent of patients are already using computers or mobile devices to view medical information. And among U.S. consumers who were surveyed, 74 percent said they would use telehealth services if given the opportunity. This is driven by the fact that 76 percent of U.S. patients value access to care over human interaction, while 70 percent are happy to interact with doctors via email, text or video instead of in person.

Medicare and Medicaid are making telemedicine services easier to afford.[3]
Medicare regulations already cover a wide variety of telehealth offerings, including services that use telecommunications and information technology to remotely supply patients with health assessments, diagnoses, interventions, consultations, and much more. Meanwhile, Medicaid is encouraging more states to take advantage of telemedicine's cost-effectiveness by using innovative payment methodologies for telemedicine-related services.

Next Up: Primary Care

Value-based care models and a growing elderly population are combining to create new challenges for health systems, and the professionals who work for them.

Smarter management of chronic illnesses will be critical to America's financial health.[1]
Chronic illnesses account for $1.5 trillion in health care spending, good for about 75 percent of the entire U.S. health expenditure. With nearly half of the population (and 85 percent of elderly people) suffering from at least one chronic illness, finding more cost-effective care methods is of paramount importance.

To rise to the challenge, physicians will need to listen more and talk less.[1]
Historically, U.S. physicians aren't trained to handle problems that are unfixable. To take on the rapidly growing challenges of aging patients with chronic issues, they'll need to sharpen their listening skills — and talk less than 50 percent of the time during the average primary care appointment.

General primary care physicians could begin making a comeback.[1]
The U.S. health system features more specialists than generalists, and it's no wonder why: Patients value the extra level of expertise, and specialists value the extra income. However, new care models that reward overall health achievements may cause patients and physicians alike to rethink this long-lasting principle.

Physicians will continue joining health systems, and focusing more on behavioral health.[1]
More and more physicians are choosing the financial security of health systems over the high risks and rewards of private practices — a trend that's likely to strengthen as integrated, accountability-based care delivery becomes the norm. Meanwhile, doctors will focus more on behavioral health as patients with issues like depression continue to be among the highest-need patients that require additional resources.

Next up: The Impact of a New Generation

Millennials have already changed the way we consume information and entertainment. Now, they're changing the way we consume healthcare services, too.

**Patients will raise their expectations for faster, easier data access.[1]**
We live in a consumer-driven culture, and healthcare is no exception. Now that smartphones and tablets are ubiquitous, patients aren't satisfied with merely meeting their doctor. They expect on-the-go access to health information and lab results. What's more, they expect it fast — preferably within minutes of leaving their doctor's office.

Biometric devices will continue to gain acceptance.[1]
The future is here! Healthcare organizations are revamping their infrastructures to account for devices that help speed the delivery of care, and keep sensitive patient data secure. Over the next year and beyond, analysts expect to see a surge in the use of biometrics for identity verification, quick access to records and more.

Physicians could see a drop in regular appointments.[8]
Maybe it's a lack of expendable income, or the fact that they're still young and healthy. Whatever the reason, 93 percent of millennials don't schedule preventative physician visits, and just over half reported they haven't seen their doctor at all within the past year. As millennials take up a greater percentage of the population, skipping physician appointments could become more common.
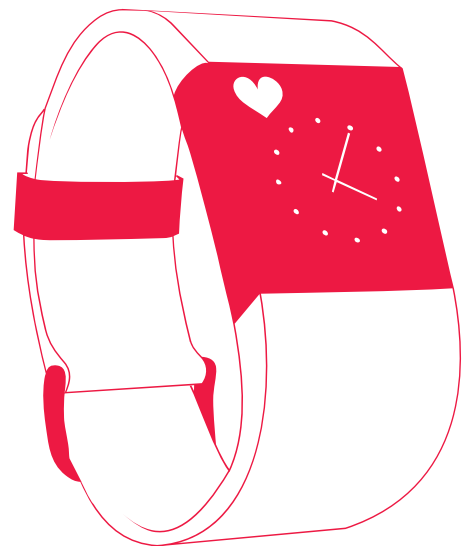
Next up: Shifting Paradigms in the Workplace

As government reform charges forward, healthcare organizations are finding new ways to boost their financial and organizational efficiency while simultaneously improving quality of care.

Collaboration skills will be more important than ever.[2]
Tomorrow's healthcare models call for professionals who are flexible enough to see beyond their specific roles, and are willing to work with team members of varying competency levels. Experts predict that hospitals will soon begin spending more on educational courses that foster better collaboration skills across their entire organization, from top to bottom.

Physicians with strong leadership skills will be increasingly rewarded.[4]
High-level administrators have begun to notice that strong physician leaders have a direct effect on patient retention levels. To help ensure their most talented leaders stay with their organizations, these key decision-makers are rewarding physicians who demonstrate important characteristics like creativity, resiliency, even temper and a willingness to share.

Hospitals will put an added emphasis on workplace safety.[5]
Safety isn't just vital for patients' health and happiness. It also plays a crucial role in employee satisfaction and retention. As a result, health systems are expected to focus more energy on physical and technological security over the foreseeable future.
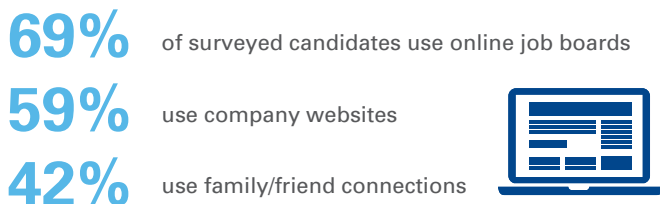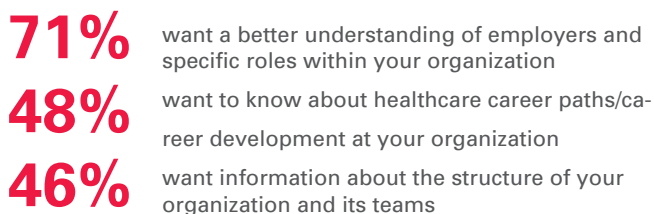
From The Candidate's Perspective: Recruitment Marketplace Overview

Observations and statistics on the state of the health care recruitment marketplace, derived from the 2016 HealthCareerCenter.com Job Search Insights Survey.

Online job boards and company websites are candidates' most-used job search resources.[3]
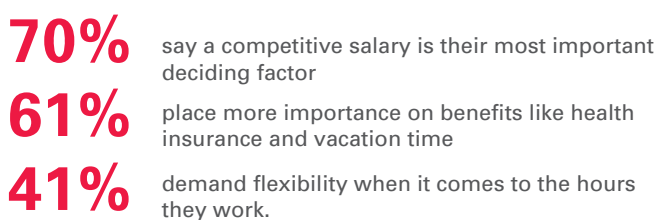
69% of surveyed candidates use online job boards

59% use company websites

42% use family/friend connections

Candidates want to see as many details as possible in your job descriptions.[3]

71% want a better understanding of employers and specific roles within your organization

48% want to know about healthcare career paths/career development at your organization

46% want information about the structure of your organization and its teams

Staying in touch with old friends is still a great way to network, but social media is catching up.[3]

21% of surveyed candidates say keeping in touch with former colleagues is effective

18% say engaging with recruiters is their preferred networking method

15% say social media is the ideal way to learn about and land new jobs

Other candidates, however, mostly care about compensation.[3]

70% say a competitive salary is their most important deciding factor

61% place more importance on benefits like health insurance and vacation time

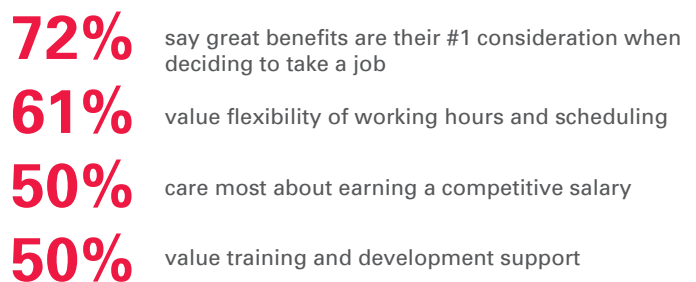**41%** demand flexibility when it comes to the hours they work.

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

29% of surveyed millennials use online job boards

27% use family/friend connections

16% use company websites
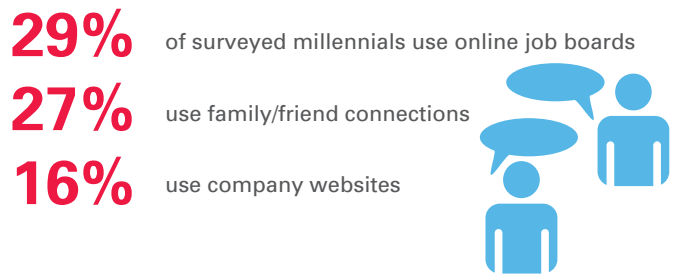
Millennials, meanwhile, want help with their resumés.[3]

73% said they want better access to resumé writing tools
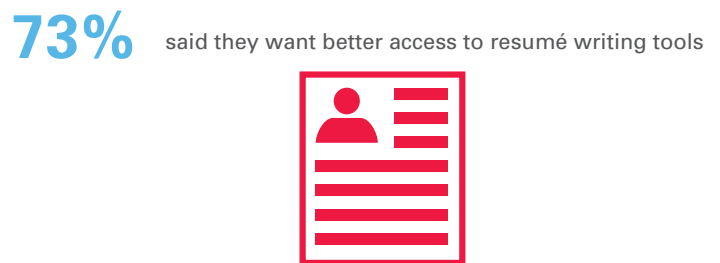
When applying for a job, millennials mostly care about benefits.

72% say great benefits are their #1 consideration when deciding to take a job

61% value flexibility of working hours and scheduling

50% care most about earning a competitive salary

50% value training and development support

More good news: most candidates are optimistic about finding success in the current job market.

36% are "very optimistic" they can find a job

28% are "somewhat optimistic"

24% are "neutral"
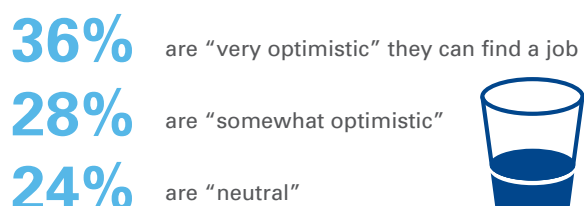
Healthcare Workforce Overview

A by-the-numbers look at the state of healthcare hiring today.[4]
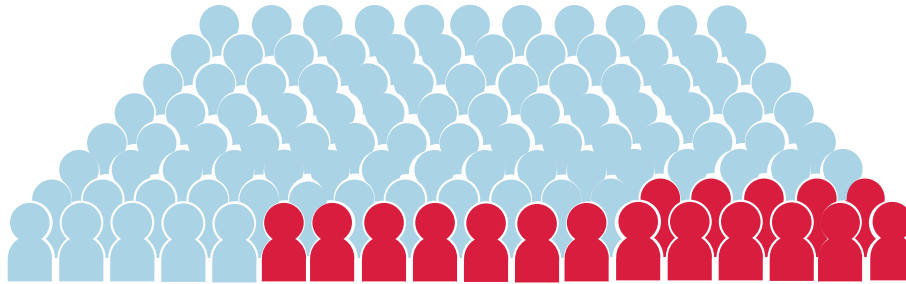
150 million
Total job candidates in the U.S.

13.24%
of total job candidates are in the healthcare field

60
The number of candidates per every healthcare job opening

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

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

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

1. Pediatrics
2. Geriatrics
3. Critical Care
4. Behavioral Health
5. Quality Assurance
6. Patient Electronic Medical Record (EMR)
7. Bilingual
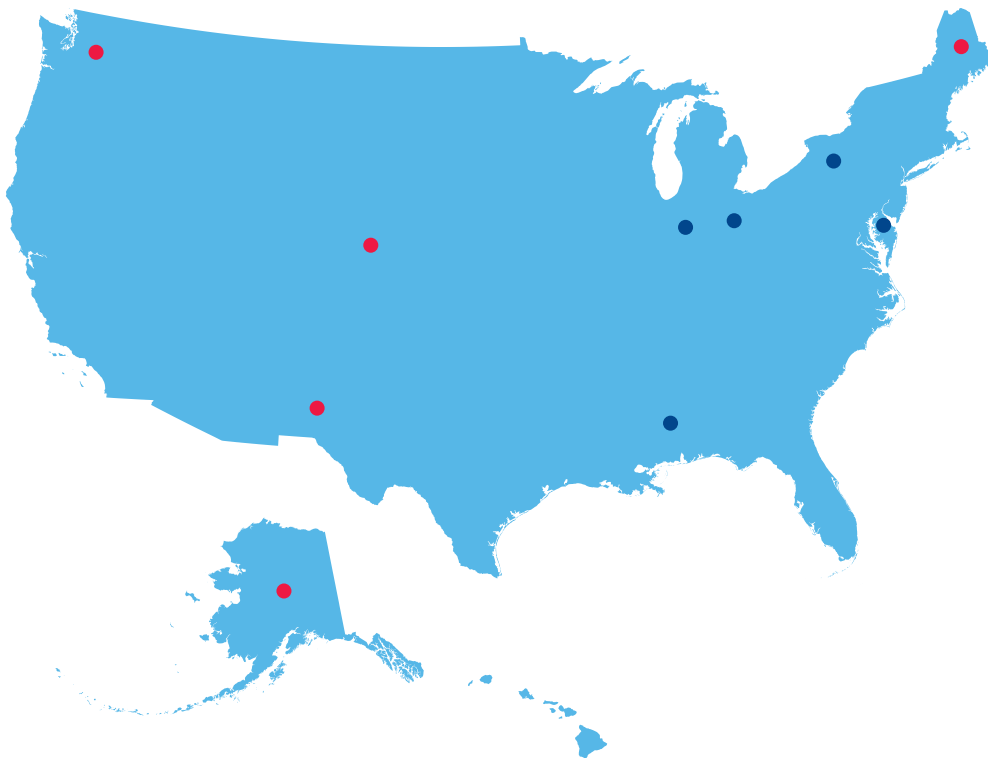8. Medical-Surgical Nursing
9. Medicaid
10. Quality control

Healthcare Hiring Demand*

States where it's <u>easiest</u> to fill health care positions

1. New Jersey
2. Alabama
3. Indiana
4. New York
5. Ohio

States where it's <u>hardest</u> to fill health care positions

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

A brief look at key statistics behind the hiring landscape for Physicians, Physician Assistants, Internal Medicine Physicians, Family Practice Physicians, Hospitalists and more.[4]

Top 10 most in-demand physician skills

1. Pediatrics
2. Patient Electronic Medical Record (EMR)
3. Critical care
4. Geriatrics
5. Private practice
6. Behavioral health
7. Emergency room
8. Quality assurance (QA)
9. Epic software
10. Bilingual

828,000
Physician job candidates in the U.S.

4.2%
of total healthcare job candidates are physicians

13
The number of candidates per every physician job opening

50 days
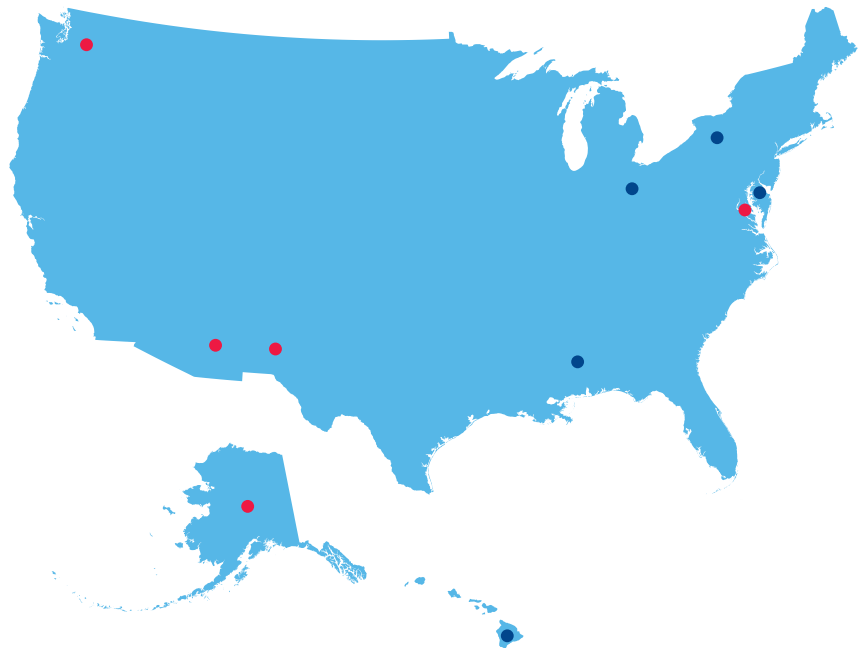How long the average physician job opening lasts before being filled

Healthcare Hiring Demand*

States where it's easiest to fill physician positions

1. Ohio
2. New Jersey
3. New York
4. Alabama
5. Hawaii

States where it's hardest to fill physician positions

1. New Mexico
2. Washington
3. Alaska
4. Washington D.C.
5. Arizona

* Difficulty level of filling a position is based on:
 • Supply (the number of candidates available)
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 • 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: Registered Nurses (RNs)

Important statistics regarding the employment prospects of RNs across America.[4]

Top 10 most in-demand RN specialties

1. Pediatrics
2. Critical care
3. Medical-Surgical Nursing
4. Geriatrics
5. Behavioral health
6. Emergency room
7. Patient Electronic Medical Record (EMR)
8. Quality Assurance (QA)
9. Utilization review
10. Medicaid

2.9 million
RN job candidates in the U.S.

14.6%
of total healthcare job candidates are RNs

14
The number of candidates per every RN job opening

50 days
How long the average RN job opening lasts before being filled

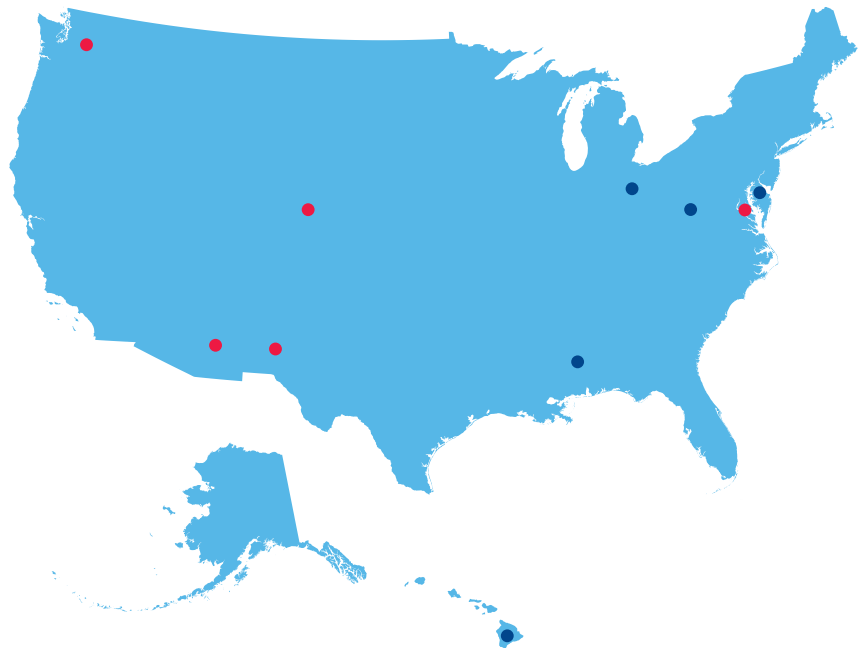## Healthcare Hiring Demand*

States where it's <u>easiest</u> to fill RN positions

1. West Virginia
2. Alabama
3. New Jersey
4. Ohio
5. Hawaii

States where it's <u>hardest</u> to fill RN positions

1. New Mexico
2. Arizona
3. Washington D.C.
4. Washington
5. Colorado

* 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: Physical Therapist

Key statistics behind the job marketplace for Physical Therapists.[6]

Top 10 most in-demand physical therapist specialties

1. Geriatrics
2. Pediatrics
3. Patient Electronic Medical Record (EMR)
4. Acute rehabilitation
5. Athletic training
6. Quality Assurance (QA)
7. Bilingual
8. Preventive maintenance
9. Utilization review
10. Information management

223,000
Physical therapist job candidates in the U.S.

1.12%
of total healthcare job candidates are physical therapists

5
The number of candidates per every physical therapist job opening

61 days
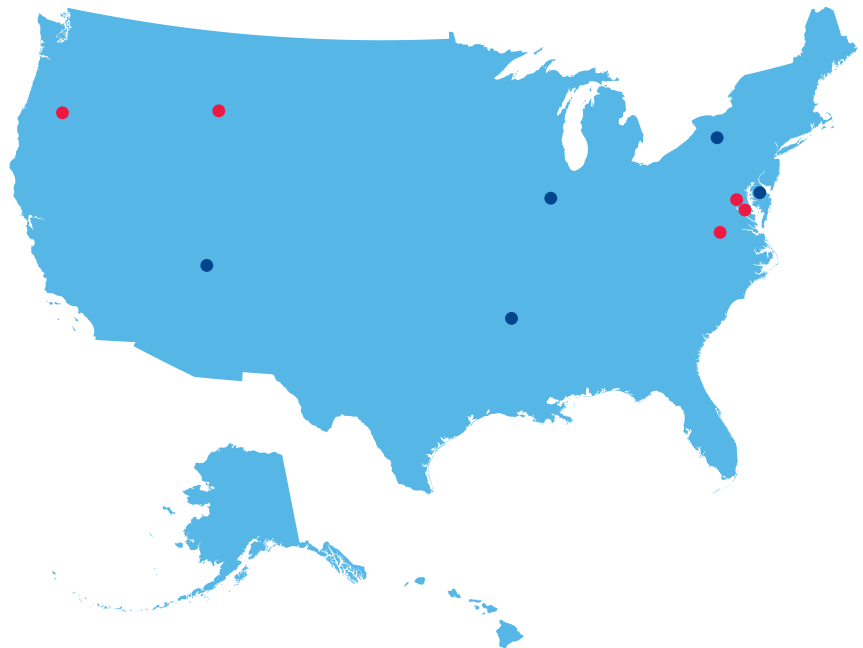How long the average physical therapist job opening lasts before being filled

Healthcare Hiring Demand*

States where it's easiest to fill physical therapist positions

1. Utah
2. Arkansas
3. New York
4. Illinois
5. New Jersey

States where it's hardest to fill physical therapist positions

1. Wyoming
2. Washington D.C.
3. Maryland
4. Virginia
5. Oregon

* 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)
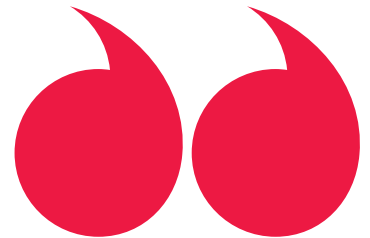
The Experts Weigh In…

What recruitment, hiring or retention obstacles do you foresee as we move toward a value-based system?

Recruitment has changed greatly over the past few years. We have seen an increase in our openings and a decrease in our candidate pool for many critical roles. We have also been assessing our time-to-fill, which also includes Recruiter and Leader response times.

One thing we have seen is that our response times are still in line with what they have been in the prior years, which may bring false hope. What we know is that, with the candidate pool shrinking, we cannot afford to maintain and instead we need to expedite our hiring decisions knowing that we have more organizations competing for the same talent. To me, each person in our organization is a recruiter. We need to tap into this talent, the relationships people hold – and utilize our networks throughout our healthcare system to attract future talent.

The perfect storm would be the way I would summarize retention. We have four generations in the workplace, increased competition for talent, and increased complexity and needing to lead from the future as it emerges. We see increased collaboration including dyad and triad relationships, the shift from healthcare to health and being responsible for the health of our community as well as cultural transformation to name a few.

**Tracy Braman,
SPHR-SCP, MBA**
Executive Director, HR
Lakeland Health
St. Joseph, Michigan

The Experts Weigh In…

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

To meet the changing needs of their communities, hospitals and health systems are working hard to provide high quality, equitable care to all patients in every community. And to achieve that goal as our nation becomes increasingly diverse, it is imperative that we accelerate our efforts to recruit, hire, educate and develop a culturally competent workforce.

As the healthcare field works to strengthen care coordination, wellness and prevention – issues that command heightened attention as we continue to transform care delivery in this country – we also must build an organizational culture of inclusion to cultivate the innovation needed to meet the changing needs of patients, communities and payers. Diverse talent at all levels of the care continuum, including leadership and governance, gives an organization a competitive advantage and access to new insights, ideas and a greater understanding of how to eliminate health care disparities.

The workforce diversity trends we are observing in the field focus on three areas:

1. Workforce diversity and inclusion are becoming an intentional strategic and business imperative. Addressing healthcare disparities for patients and increasing the diversity of employees is being led by hospital leadership and governing boards. And metrics tied to performance incentives are being implemented to monitor progress.

2. Jobs, business departments and learning collaboratives are being created to incorporate diversity, equity and inclusion principles into the organizational infrastructure, functions and policies to create culturally competent, sustainable organizations in an increasingly value-driven environment.

3. More hospitals and health systems are implementing formal mentoring and internship programs to engage with multi-culturally diverse students at the high school, college and graduate school level.
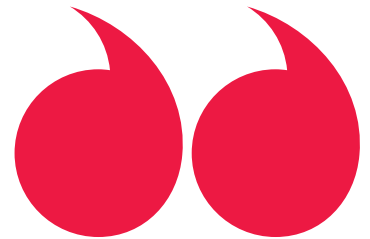
M. Tomas León, **MBA**
President & CEO,
Institute for Diversity in Health Management
American Hospital Association
Chicago, Illinois
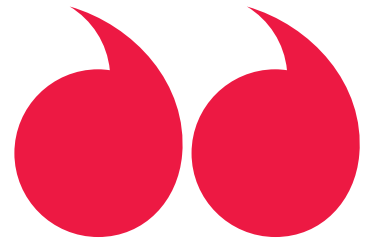
The Experts Weigh In…

What are AHA's strategic priorities for ensuring a competent and engaged workforce in the future?

This year, the AHA Board Committee on Performance Improvement will be discussing the need to integrate workforce planning and development with hospital strategy and operations.

The committee's efforts will ultimately lead to a new resource for members on how to integrate two critical areas that must be addressed hand-in-hand in order to achieve the Triple Aim – better care, better health and lower costs.

The second strategic priority is to support inter-professional teams who provide seamless, integrated and coordinated care across the continuum. This is evident in the Workforce Center's support of and focus on the workforce implications of integrating behavioral and physical health.

The third strategic priority is to promote excellence in the work environment, facilitating recruitment and retention and the safety of all employees.

Veronika Riley
Director, Workforce Center
American Hospital Association
Washington, D.C.

The Experts Weigh In…

How are roles for physician leaders changing given the transformation of the healthcare system?

We are at a crossroads in healthcare, where payment and care delivery models are changing. In order to be successful in this changing environment, hospital leaders and physicians must work closely together.

This juncture requires new skills, competencies and professional attitudes, including a more collaborative model of leadership where physicians and hospital leaders work together to form a successful integrated health system.

Both physician and administrative leaders need to be educated together in this new model to understand their collective roles and help their organizations achieve an empowerment-oriented, consensus-based clinical enterprise while understanding and respecting the unique skills each brings to the organization.
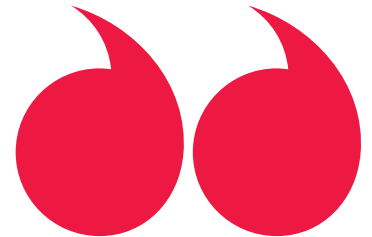
John R. Combes, M.D.
Chief Medical Officer and Senior Vice President, American Hospital Association
President, Center for Healthcare Governance
Chicago, Illinois

The Experts Weigh In…

What are the major priorities for healthcare HR leaders in the coming year?

This is a pivotal era for healthcare HR leadership, requiring ongoing management of existing responsibilities and new levels of aptitude in developing priorities. The three most critical priorities for healthcare HR in the coming year are:

1. Nurturing Engagement
The pace of change in healthcare today is constant, and HR needs to lead the human side of healthcare with insight and empathy. Relationship building and leadership development at all levels are critical this year. Cultures that focus on dissolving traditional siloes and building bridges of communication between HR, physicians and nursing will achieve greater collective success.

2. Reimagining the Workforce
Market competition and changes resulting from the ACA are requiring greater creativity in workforce planning, evaluation and retention. One generation is retiring and another is stepping up with different values and priorities. Bold leadership from healthcare HR is needed to create emerging roles and retool existing workforces.

3. Reinventing Ourselves
To partner strategically with the C-suite, healthcare HR must demonstrate greater business acumen in predictive data analysis, competitive benchmarking and technology, including connecting employees through social media and integrated platforms for collaboration. New metrics are needed to inform decision-making and change acceleration processes.

**Dawn M. Rose,
JD, PHR, SHRM-CP**
Executive Director, ASHHRA
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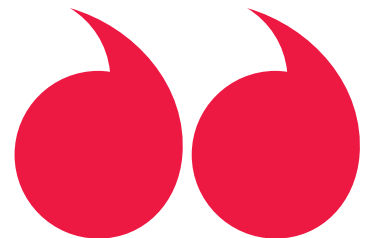
Sources

[1] "2016 Environmental Scan," American Hospital Association, 2015.

[2] "Connecting the Dots Along the Care Continuum," American Hospital Association, 2015.

[3] "The Promise of Telehealth for Hospitals, Health Systems, and Their Communities," American Hospital Association, January 2015.

[4] "Creativity, Resilience Hallmarks of Great Physician Leaders," Hospitals and Health Networks, December 2015.

[5] "Improving Patient Safety Culture Through Teamwork and Communication," TeamSTEPPS, 2015.

[6] WANTED Analytics, data accessed February 1, 2016

[7] "2016 HealthCareerCenter.com Job Search Insights Survey", HealthCareerCenter.com, conducted February 2016.

[8] "Millennials and Healthcare: 25 Things to Know", Becker's Hospital Review, accessed March 1, 2016