

Key Findings, 2014

Health Occupations

in the San Diego & Imperial Counties 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 Centers of Excellence and the Health Workforce Initiative (HWI). For more information, go to:

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Inside:

Research Objectives
Industry Employment
Occupational Employment
Workforce Challenges
Education & Training



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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, 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:

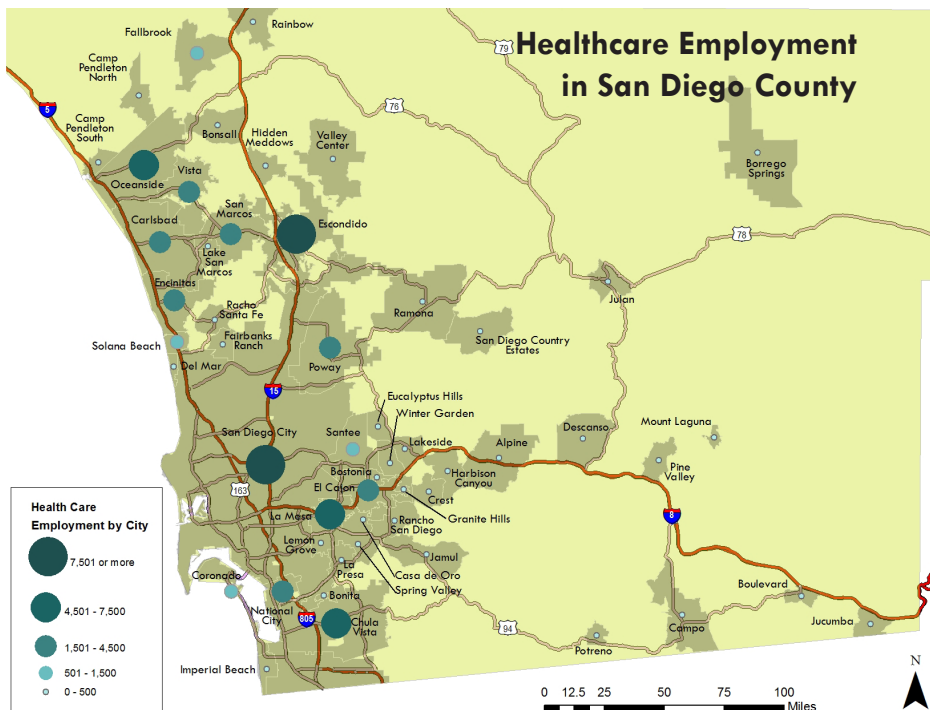
- labor market demand for key occupations in healthcare industries
- training supply supporting healthcare industries
- key issues impacting supply and demand

One in a series of reports profiling healthcare occupations in the San Diego & Imperial Counties region, 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's assistants, and registered nurses.¹

Industry Employment by Healthcare Sector

In the San Diego & Imperial Counties region, there are more than 6,700 healthcare establishments, employing nearly 117,000 workers across all occupational categories.²

- ✓ About 58% of employment is in the ambulatory care services subsector.
- ✓ One-fifth (21%) reside in general and various specialty hospitals.
- ✓ Another 21% falls within the nursing and residential care facilities subsector.
- ✓ San Diego County alone is home to over 6,500 healthcare firms, accounting for 115,000 jobs. Most of these jobs are concentrated in the cities of San Diego, Escondido, La Mesa, Chula Vista and Oceanside.



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.

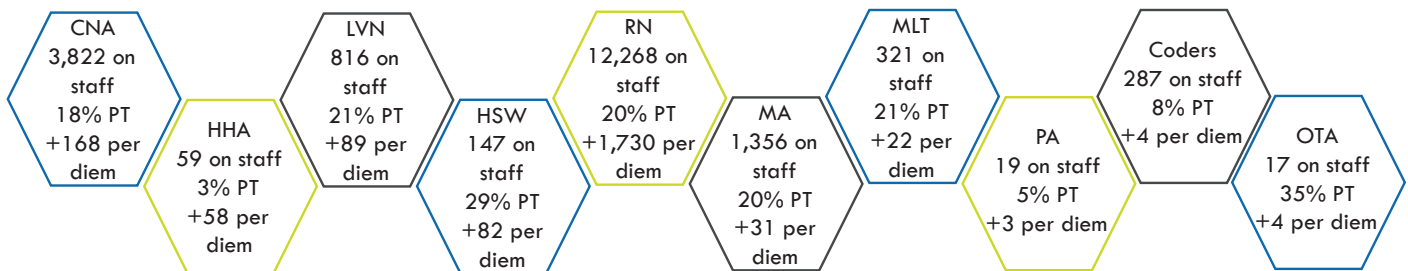
Occupational Employment

The following table contains the estimated employment data for the ten health occupations in the San Diego & Imperial Counties region. **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 below are extrapolated from the sample responses to approximate the employment for all of these employers in the region. The table is sorted by total openings.³

Occupations	2014 Employment	12-month Job Growth	Replacement Jobs	Total Openings (Growth + Replacements)
Certified Nursing Assistants (CNA)	7,320	2,040	2,400	4,440
Home Health Aides (HHA)	5,200	1,550	1,380	2,930
Licensed Vocational Nurses (LVN)	1,400	70	560	630
Health Social Worker (HSW)	1,390	210	380	590
Registered Nurses (RN)	2,710	180	400	580
Medical Assistant (MA)	2,250	240	320	560
Medical Laboratory Technicians (MLT)	860	10	240	250
Physician Assistants (PA)	950	40	150	190
Medical Coders (Coders)	800	20	70	90
Occupational Therapy Assistants (OTA)	390	20	70	90

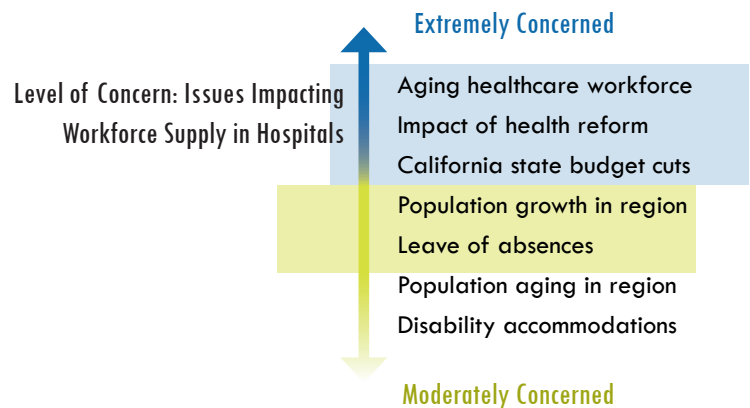
Source: COE/HWI employer survey, 2014.

Hospital survey respondents provided information related to the current employment levels for each of the occupations studied. In the San Diego & Imperial Counties region, 16 hospitals provided data (14 in San Diego County and two in Imperial County). 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.



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. **In the region**, the majority of hospitals are most concerned that health reform, the aging hospital workforce and state budget cuts will have a significant impact on the hospitals' ability to keep up with healthcare workforce demand.



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.

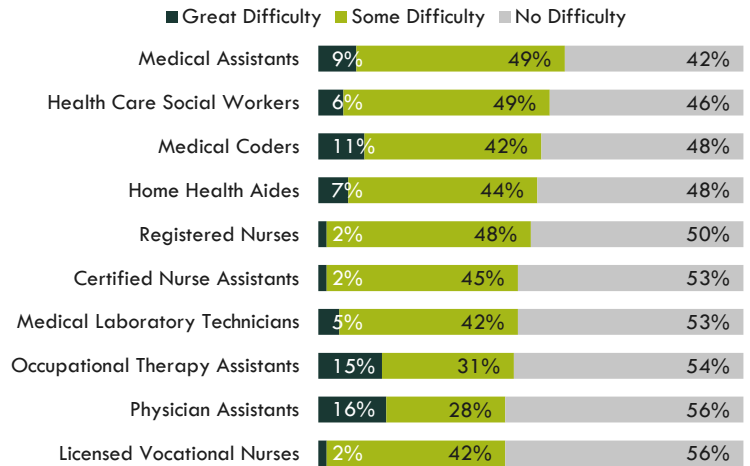
Workforce Challenges

Ambulatory care and nursing and residential care employers indicated their level of difficulty in hiring each occupation. Key findings include:

- **Medical assistants** represent a large occupation, with annual job openings of 560. Although many regional programs (including proprietary ones) train a significant number of students, the majority of surveyed employers (58%) still find it challenging to hire qualified applicants.
- **Healthcare social workers** are a small but in-demand occupation, with 15% new job growth anticipated. Over half of employers (55%) reported difficulty finding entry-level applicants.
- **Medical coders** and **home health aides** are also considered difficult to hire occupations by over half of employers surveyed.

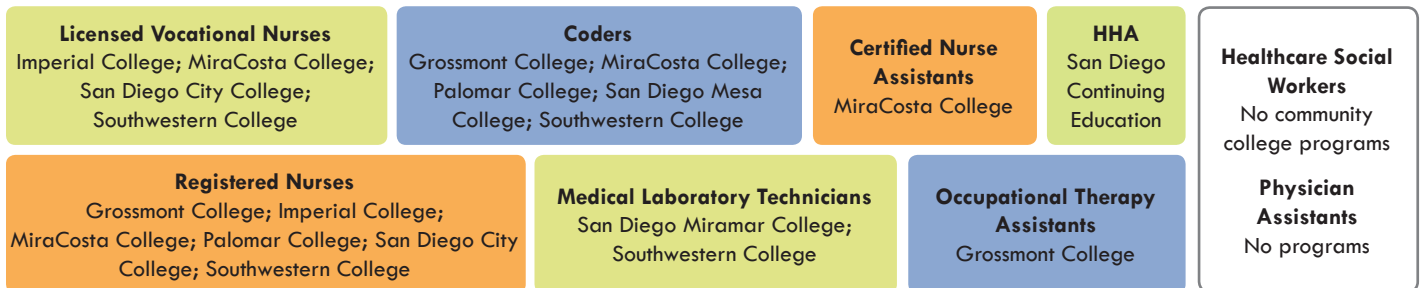
Level of Difficulty Finding Qualified Applicants

Responses from San Diego & Imperial Ambulatory Care and Nursing & Residential Care Employers



Education and Training

Healthcare establishments 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 & residential care, all of the occupations surveyed receive employer support of some sort for professional development – ranging from 46% of Medical Coder employers to 78% of LVN and HHA employers. The graphic below details San Diego and Imperial counties community college program offerings associated with the ten 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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