HealthCare ACADEMY

Industry Analysis & Program Overview

Presentation to
WISF Health Care Subcommittee
September 10, 2013

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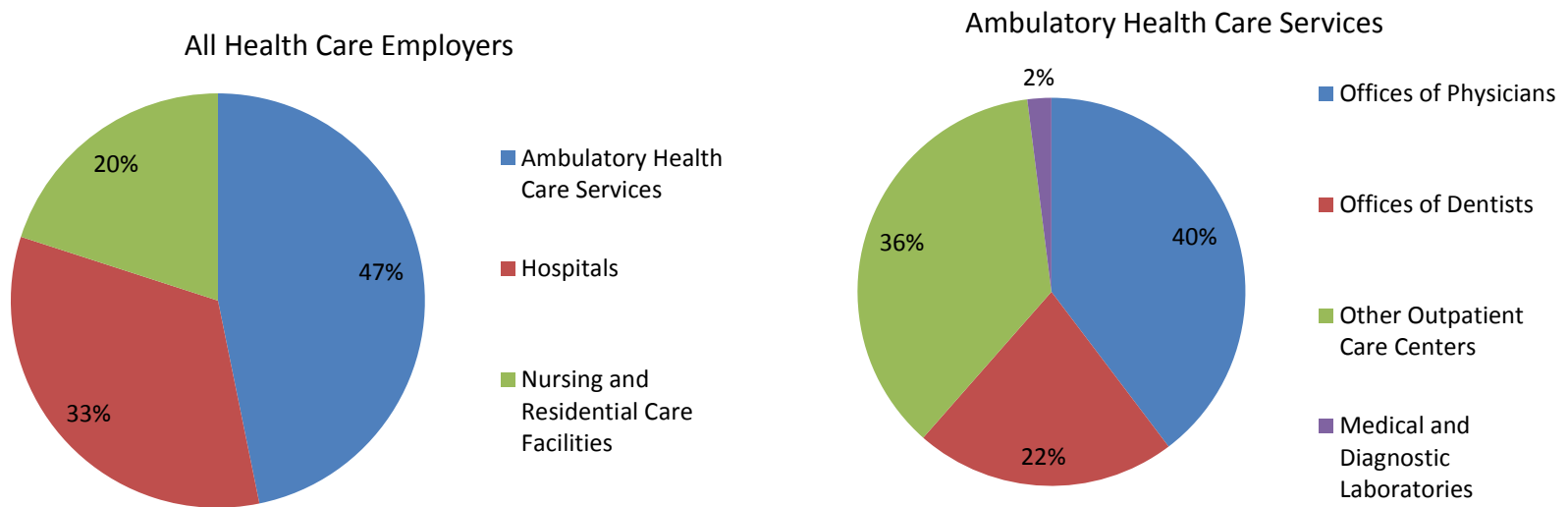*Building Tomorrow's Workforce Today*

San Francisco Health Care Industry: Overview

- One of the biggest industry sectors in the Bay Area and SF

- Over 2,000 employers of varying sizes

- Almost 30,000 people employed

- Includes acute-care hospitals, nursing and residential care facilities, and ambulatory health services—as well as home-based care and health care staffing agencies

- A few large employers and many very small employers, such as doctors' offices

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San Francisco Health Care Sector Employment, 2013

Percentage of Employers by type of Organization:

All Health Care Employers

- Ambulatory Health Care Services
- Hospitals
- Nursing and Residential Care Facilities

Ambulatory Health Care Services

- Offices of Physicians
- Offices of Dentists
- Other Outpatient Care Centers
- Medical and Diagnostic Laboratories

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Growth in Regional Health Care Industry

Actual and Projected Growth from 2008-2018:
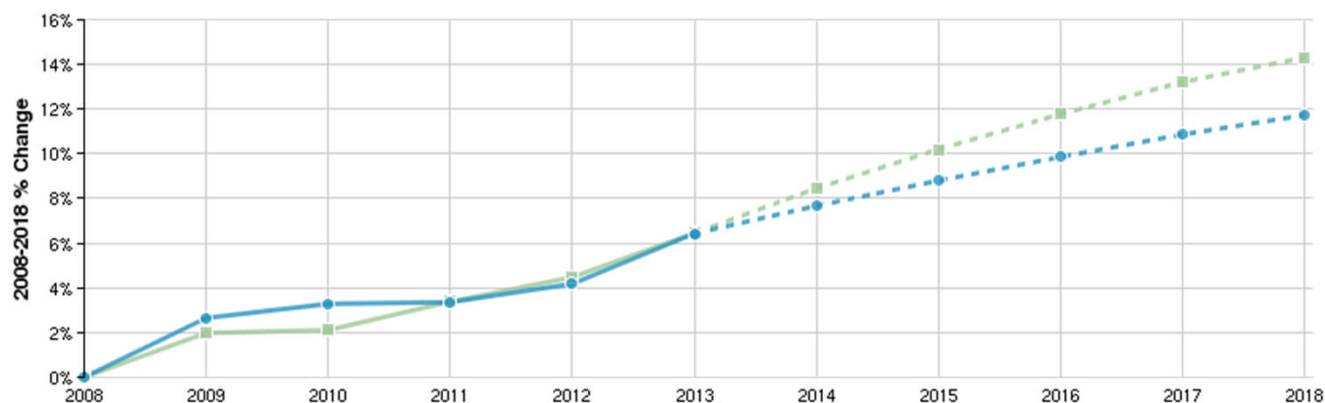
	Area	2008 Jobs	2018 Jobs	Change	% Change	2013 Average Earnings	2012 Companies
●	San Francisco	27,980	31,262	3,282	12%	$87,478	2,072
●	Region	109,509	125,178	15,669	14%	$93,700	7,461

Source: EMSI 2013.2 Class of Worker, QCEW

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Health Care Occupational Clusters

(*Projected Demand 2010-2018*)

Healthcare Practitioners

Job Title	Job Code	New openings 2010-2018 (Growth & Turnover)
Registered Nurses	(29-1111)	*17,086*
Licensed Vocational Nurses	(29-2061)	*5,423*
Respiratory Therapists	(29-1126)	*61*

Administrative

Job Title	Job Code	New openings 2010-2018 (Growth & Turnover)
Medical Records and Health Information Technicians	(29-2071)	*1,011*
Medical Secretaries	(43-6013)	*5,144*

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Health Care Occupational Clusters

(*Projected Demand 2010-2018*)

Technicians & Technologists

Job Title	Job Code	New openings 2010-2018 (Growth & Turnover)
Dental Hygienists	(29-2021)	*1,866*
Emergency Medical Technicians and Paramedics	(29-2041)	*1,394*
Medical and Clinical Laboratory Technicians	(29-2012)	*1,232*
Pharmacy Technicians	(29-2052)	*2,153*
Radiologic Technologists and Technicians	(29-2037)	*950*
Surgical Technologists	(29-2055)	*956*

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Health Care Occupational Clusters
(*Projected Demand 2010-2018*)

Healthcare Support

Job Title	Job Code	New openings 2010-2018 (Growth & Turnover)
Dental Assistants	(31-9091)	*3,625*
Home Health Aides	(31-1011)	*7,898*
Medical Assistants	(31-9092)	*5,042*
Nursing Aides, Orderlies, and Attendants	(31-1012)	*6,289*
Pharmacy Aides	(31-9095)	*163*

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Employer Needs and Challenges

- Employers do not report tremendous difficulty finding technically qualified applicants for jobs

- Employers report difficulty finding employees with the necessary combination of technical skills, soft skills, and cultural competency to successfully implement the Affordable Care Act.

- Employers experience difficulty keeping employees current on new technology

- By 2020 nearly half of all registered nurses will reach traditional retirement age

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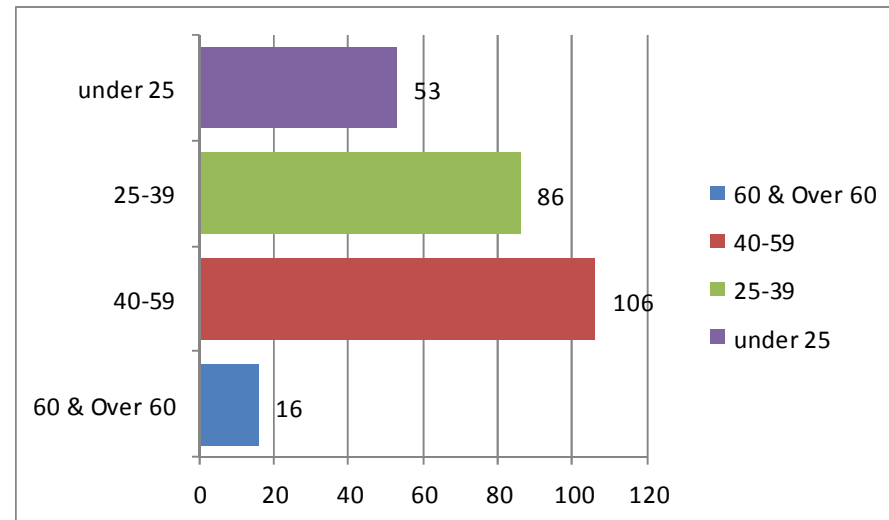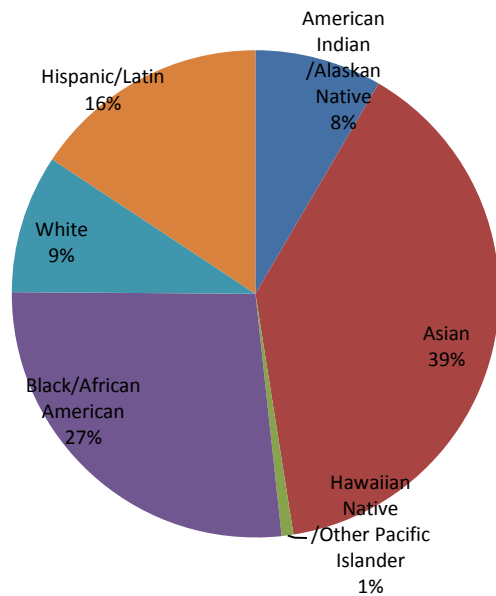
TRAINING 2013-14

- Personal Caregiver (English, Spanish, Chinese)
- Home Health Aide (English, Chinese)
- Certified Nurse Assistant
- Medical Administrative Assistant
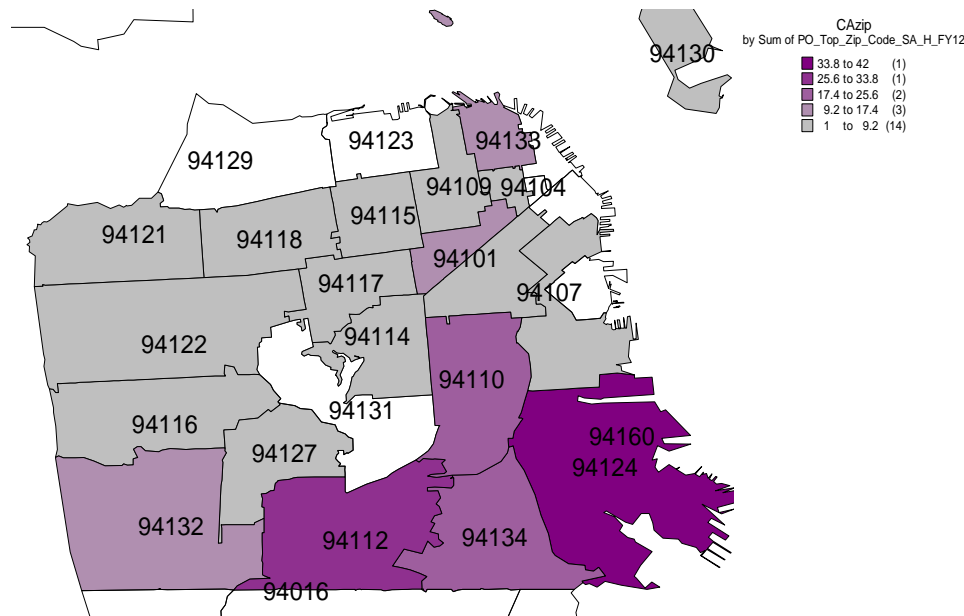- Health Worker Administration

PLUS

- Panel Management and customer service training for Medical Assistant students at CCSF
- Wraparound and Job Search support for MA's, nurses, and others who qualify
- Research and develop additional trainings as needed

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Demographics of Health Care Academy Participants PY 12-13

Health Care Academy Participants by Zip Code PY 12-13

CAzip
by Sum of PO_Top_Zip_Code_SA_H_FY12

- 33.8 to 42 (1)
- 25.6 to 33.8 (1)
- 17.4 to 25.6 (2)
- 9.2 to 17.4 (3)
- 1 to 9.2 (14)

Top 10 Zip	No.(%)
94124	42 (16%)
94112	29 (11%)
94134	24 (9%)
94110	21 (8%)
94102	12 (5%)
94133	11 (4%)
94132	10 (4%)
94122	9 (3%)
94103	8 (3%)
Out of SF	22 (8%)
Total	**261 (100%)**

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HealthCare Academy Results
January 1, 2010 - June 30, 2013

Number of Clients Enrolled	**886**
Number of Clients Placed	**516**

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Discussion Questions

1. **Employment Projections: Now and Under Affordable Care Act**

- **What are the trends now, and what do you expect with implementation of ACA?**
  - Most in-demand jobs
  - Jobs no longer in-demand
  - Recruitment "pain points"
  - When do you expect changes to begin?

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Discussion Questions

2. Healthcare Academy trains mainly entry-level Healthcare workers:

- What are the in-demand technical or non-patient care jobs for entry-level applicants?

- What are the most needed competencies for entry-level applicants?

- How do you engage community members and consumers in service? (e.g., peer support, outreach, mentoring)

Discussion Questions

3. Health Care Academy Pipeline

- What are career paths for entry-level workers to move into licensed positions?

- What are recruitment strategies for pathways into higher-level positions?

- What training services are needed to fulfill requirements for changing workforce needs?

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Next Steps:
Planning & Recommendations

> **Program Implementation – Summer-Fall 2013**

> **Update of Health Care Subcommittee at WISF meeting – October 2, 2013**

> **Next Health Care Subcommittee Meeting – March, 2014**

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