Current and Projected Health Workforce
Supply and Demand in Nevada

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February 24, 2016

Nevada’s Health Workforce

129,551 total jobs or 10.2% of the civilian workforce in Nevada

- 57,359 health care jobs in health care industries (44.3% of the health workforce)
- 46,636 other jobs in health care industries (36.0% of the health workforce)
- 25,556 health care jobs in other industry sectors (19.7% of the health workforce)

Source: Nevada Department of Employment, Training, and Rehabilitation (2015)
Health Workforce Demand

Forces Driving Health Workforce Demand

Primary Factors
• Population growth and aging
• ACA, health insurance coverage expansions
• Economic growth, Tesla/Faraday

Important, but Secondary Factors
• Population health (demand ≠ need)
• Health care system change
• Science and technological change
Insurance Coverage Expansion and the Demand for Medical Care

Estimated percent change relative to current demand/utilization in the U.S. (range):

- Inpatient stays: -0.8 to +10.9%
- ED visits: -2.2 to +11.9%
- Office-based visits: +2.2 to +9.7%
- Prescribed medicines: +1.1 to +8.7%


Health Care Employment in Nevada

Number of Jobs (Thousands) – 2005 to 2015

Source: Nevada Department of Employment, Training, and Rehabilitation (2016).
Health Care Employment in Las Vegas
Number of Jobs (Thousands) – 2005 to 2015

<table>
<thead>
<tr>
<th>Year</th>
<th>Health Care and Social Assistance</th>
<th>Ambulatory Health Care Services</th>
<th>Hospitals</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>51.8</td>
<td>24.8</td>
<td>12.4</td>
</tr>
<tr>
<td>2006</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2007</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td>51.9</td>
<td>29.6</td>
<td>15.2</td>
</tr>
<tr>
<td>2010</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2011</td>
<td></td>
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<td>2012</td>
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<td></td>
</tr>
<tr>
<td>2014</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td>74.4</td>
<td>36.6</td>
<td>18.3</td>
</tr>
</tbody>
</table>

Source: Nevada Department of Employment, Training, and Rehabilitation (2016).

Projected Demand for Health Care Workers by Industry in Nevada from 2012 to 2022

- **Total Health Care and Social Assistance Sector:**
  - + 17,661 jobs (+16.3%)

- Ambulatory Care: 6,877 jobs (+15.8%)
  - Offices of physicians: 1,602 jobs (+9.5%)
  - Offices of dentists: 708 jobs (+9.6%)

- Hospitals: 3,821 jobs (+11.9%)

- Skilled Nursing Facilities: 2,585 jobs (+22.7%)

Source: Nevada Department of Employment, Training, and Rehabilitation (2016).
Health Care Sector in Nevada
Job Postings – 2013 to 2015


Hospitals in Nevada
Job Postings – 2013 to 2015

Ambulatory Care in Nevada
Job Postings – 2013 to 2015

<table>
<thead>
<tr>
<th>Year</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>3,369</td>
<td>3,623</td>
<td>5,908</td>
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</table>


Skilled Nursing Facilities in Nevada
Job Postings – 2013 to 2015

<table>
<thead>
<tr>
<th>Year</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>788</td>
<td>913</td>
<td>1,499</td>
</tr>
</tbody>
</table>

Health Care Occupations in Nevada
Job Postings – 2015


Physicians
Job Postings – from 2013 to 2015

Registered Nurses
Job Postings – 2013 to 2015

<table>
<thead>
<tr>
<th>Year</th>
<th>Health Care Industries</th>
<th>Other Industries</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>3,818</td>
<td>1,504</td>
</tr>
<tr>
<td>2014</td>
<td>4,747</td>
<td>1,841</td>
</tr>
<tr>
<td>2015</td>
<td>7,131</td>
<td>2,901</td>
</tr>
</tbody>
</table>


Physical Therapists
Job Postings – 2013 to 2015

<table>
<thead>
<tr>
<th>Year</th>
<th>Health Care Industries</th>
<th>Other Industries</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>659</td>
<td>62</td>
</tr>
<tr>
<td>2014</td>
<td>863</td>
<td>146</td>
</tr>
<tr>
<td>2015</td>
<td>1,203</td>
<td>155</td>
</tr>
</tbody>
</table>

Health Information Technicians
Job Postings – 2013 to 2015


Physician Assistants
Job Postings – 2013 to 2015

Health Workforce Demand in Nevada

• Overall growth in health care employment (16.3%) is projected to exceed the average for all occupations in Nevada (13.8%) through 2022

• Population growth and aging, as well as ACA-related insurance coverage expansions will generate above average demand for health care workers in Nevada

High Demand Health Occupations in Nevada

• 11 “high demand” health care occupations are ranked among the top 100 occupations in Nevada with the largest projected job growth through 2022

• 20 of the top 35 “high demand” health care occupations possess an average annual salary greater than average annual salary of $42,310 for all occupations in Nevada

• 22 require a post-secondary degree for licensure in the State of Nevada
Health Workforce Supply

Health Workforce Supply in Nevada

- Steady growth in the number of licensed health professionals across most professions
- “Treading water” in the number of licensed health professionals per capita for some, not all
- Severe health workforce shortages compounded by an aging health workforce and ensuing ACA-related demand
- Persistent specialty shortages and geographic maldistribution of physicians and most other health professionals
Current Physician Workforce Rankings
Number of Active Licensees per 100,000 Population

- Physicians, MD & DO – 48th
- Patient Care Physicians – 48th
- Primary Care Physicians – 50th
- Patient Care Primary Care Physicians – 50th
- Residents & Fellows – 47th
- Residents & Fellows in Primary Care – 48th

Source: UNSOM Office of Statewide Initiatives (2016).

Current Physician Workforce Rankings
Number of Active Licensees per 100,000 Population

- Anesthesiology – 24th
- General and Family Practitioners – 46th
- General Surgeons – 51st
- Internal Medicine – 30th
- Obstetricians and Gynecologists – 45th
- Ophthalmologists – 49th
- Orthopedic Surgeons – 51st
- Pediatricians – 47th
- Psychiatry – 47th

Source: UNSOM Office of Statewide Initiatives (2016).
### Current Nursing Workforce Rankings

Number of Active Licensees per 100,000 Population

- Registered Nurses – 51<sup>st</sup>
- Nurse Practitioners – 51<sup>st</sup>
- Certified Nurse Anesthetists – 50<sup>th</sup>
- Licensed Practical Nurses – 48<sup>th</sup>

Source: UNSOM Office of Statewide Initiatives (2016).

### Current Health Workforce Rankings

Number of Active Licensees per 100,000 Population

- Dentists – 34<sup>th</sup>
- Dental Hygienists – 36<sup>th</sup>
- EMTs and Paramedics – 36<sup>th</sup>
- Pharmacists – 38<sup>th</sup>
- Physical Therapists – 45<sup>th</sup>
- Physician Assistants in Clinical Practice – 38<sup>th</sup>
- Psychologists – 47<sup>th</sup>

Source: UNSOM Office of Statewide Initiatives (2016).
Number of Licensed Allopathic Physicians (MDs) per 100,000 Population in Nevada – 2004 to 2014

Source: OSI analysis of unpublished data from Nevada State Board of Medical Examiners (2016).

Number of Licensed Registered Nurses (RNs) per 100,000 Population in Nevada – 2004 to 2014

Source: OSI analysis of unpublished data from Nevada State Board of Nursing (2016).
Number of Licensed Advanced Practitioners of Nursing (APNs) per 100,000 Population in Nevada – 2004 to 2014

Source: OSI analysis of unpublished data from Nevada State Board of Nursing (2016).

Number of Licensed Dentists per 100,000 Population in Nevada – 2004 to 2014

Source: OSI analysis of unpublished data from Nevada State Board of Dental Examiners (2016).
Primary Care Physicians
Number of MDs per 100,000 Population

- Family Medicine: Nevada 20.9, Mountain Region 31.4, U.S. 29.6
- General Practice: Nevada 1.0, Mountain Region 1.2, U.S. 2.1
- Internal Medicine: Nevada 40.5, Mountain Region 39.6, U.S. 56.0
- OB/Gyn: Nevada 10.3, Mountain Region 11.9, U.S. 14.0


Surgeons and Specialty Physicians
Number of MDs per 100,000 Population

- General Surgery: Nevada 8.3, Mountain Region 10.2, U.S. 12.4
- Orthopedic Surgery: Nevada 5.4, Mountain Region 8.0, U.S. 8.4
- Cardiovascular Disease: Nevada 4.8, Mountain Region 5.0, U.S. 7.5
- Gastroenterology: Nevada 2.8, Mountain Region 3.4, U.S. 4.5
- Psychiatry: Nevada 6.5, Mountain Region 6.5, U.S. 9.1

Primary Care Physicians
Number of MDs and DOs per 100,000 Population

Source: OSI analysis of unpublished data from the Nevada State Board of Medical Examiners and Nevada State Board of Osteopathic Medicine (2016).

Surgeons and Specialty Physicians
Number of MDs and DOs per 100,000 Population

Source: OSI analysis of unpublished data from the Nevada State Board of Medical Examiners and Nevada State Board of Osteopathic Medicine (2016).
Primary Care Health Professional Shortage Areas (HPSAs) – 2016

- 962,156 Nevadans reside in a primary care HPSA (33.7%)
- 815,657 urban residents in Nevada (31.8% of urban residents) live in a primary care HPSA, including 613,000 residents of Clark County
- 142,476 rural residents (49.8% of rural residents) live in a primary care HPSA
- 9 single-county primary care HPSAs

Source: OSI analysis of data from the Health Resources Services Administration (2016).

Dental Health Professional Shortage Areas (HPSAs) – 2016

- 903,241 Nevadans reside in a dental HPSA (31.7%)
- 757,815 urban residents in Nevada (29.5% of urban residents) live in a dental HPSA, including 612,710 residents of Clark County
- 145,426 rural residents (50.8% of rural residents) live in a dental HPSA
- 8 single-county dental HPSAs

Source: OSI analysis of data from the Health Resources Services Administration (2016).
Mental Health Professional Shortage Areas (HPSAs) – 2016

- 1.5 million Nevadans reside in a mental HPSA (53.3%)
- 1.2 million urban residents in Nevada (48.1% of urban residents) live in a mental HPSA, including 736,908 residents of Clark County
- 286,251 rural residents (100.0% of rural residents) live in a mental HPSA
- 16 single-county mental HPSAs

Source: OSI analysis of data from the Health Resources Services Administration (2016).

Health Workforce Research, Planning, and Policy in Nevada
Policy Levers

• Higher education programs and capacity – esp., public programs and opportunities
• Health professions licensing and regulation
• State policy and budget – esp. funding for higher education health education programs
• Federal policy – esp. support for health workforce education and training
• K-12 education pipeline

Proactive versus Reactive Health Workforce Research and Planning

• Need for better data on health workforce demand, esp., industry workforce needs
• Need for better data on current and projected supply of health workforce, esp., health professions MDS and graduate retention
• Need for real world health workforce supply and demand modeling and estimates, e.g., primary care demand
### Demographic Characteristics of the RN Workforce in Nevada – 2015

<table>
<thead>
<tr>
<th>Region</th>
<th>Highest Level of RN Education</th>
<th>Age</th>
<th>Hispanic</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Associate</td>
<td>Baccalaureate</td>
<td></td>
</tr>
<tr>
<td>Clark County</td>
<td>44.8%</td>
<td>47.3%</td>
<td>46</td>
</tr>
<tr>
<td>Washoe County</td>
<td>53.5%</td>
<td>43.1%</td>
<td>45</td>
</tr>
<tr>
<td>Carson City</td>
<td>68.0%</td>
<td>25.5%</td>
<td>50</td>
</tr>
<tr>
<td>Rural Counties</td>
<td>74.4%</td>
<td>24.3%</td>
<td>49</td>
</tr>
<tr>
<td>Total</td>
<td>48.9%</td>
<td>44.3%</td>
<td>46</td>
</tr>
</tbody>
</table>

Source: OSI analysis of Nevada Nursing Minimum Data Set (MDS) data provided by the Nevada State Board of Nursing for the calendar year 2015 (N=8,690) (2016).

### Retention of Physicians Completing UNSOM GME in Nevada – 2006 to 2015

<table>
<thead>
<tr>
<th></th>
<th>2015 (N=103)</th>
<th>Continuation GME or Other</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Beginning Practice</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Remaining in Nevada</td>
<td>42.7%</td>
<td>7.8%</td>
<td>50.5%</td>
</tr>
<tr>
<td>Leaving Nevada</td>
<td>33.0%</td>
<td>16.5%</td>
<td>49.5%</td>
</tr>
<tr>
<td>Total</td>
<td>75.7%</td>
<td>24.3%</td>
<td>100.0%</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th></th>
<th>2006 to 2015 (N=773)</th>
<th>Continuation GME or Other</th>
<th>Total</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Beginning Practice</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Remaining in Nevada</td>
<td>44.1%</td>
<td>7.4%</td>
<td>51.5%</td>
</tr>
<tr>
<td>Leaving Nevada</td>
<td>35.8%</td>
<td>12.7%</td>
<td>48.5%</td>
</tr>
<tr>
<td>Total</td>
<td>79.9%</td>
<td>20.1%</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

## Retention of Students Completing NSHE Nursing Education Programs – 2010 to 2014

<table>
<thead>
<tr>
<th>Current Employment Status at Graduation</th>
<th>Number</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working or have been offered a job in Nevada</td>
<td>520</td>
<td>26.9%</td>
</tr>
<tr>
<td>Seeking employment only in Nevada</td>
<td>781</td>
<td>40.3%</td>
</tr>
<tr>
<td>Offered a job or seeking employment in another state</td>
<td>100</td>
<td>5.2%</td>
</tr>
<tr>
<td>Seeking employment in multiple states, including Nevada</td>
<td>228</td>
<td>11.8%</td>
</tr>
<tr>
<td>Continuing education or not actively seeking employment</td>
<td>307</td>
<td>15.9%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>1,936</td>
<td>100.0%</td>
</tr>
</tbody>
</table>