



## **Industry Futures Series**

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In the Wake of Health Care Reform: Fast-Growth Jobs and Skills in the Decade Ahead

# Wanted: Richer Employer-Side Market Intelligence

*Conventional Market Research Ill-Suited to Discover Breakthrough Opportunities*

## Traditional Methods Limited



### Student Surveys

- Schedule and delivery preference
- True labor market demand

### Community Workforce Boards



- Local employer perspectives
- Thought leadership and national perspectives

### Bureau of Labor Statistics



- It's free?
- Data too old

## Wishing for Better Answers



### **Will Employers Hire Our Students?**

“Surveys show what students will take, but not what companies will hire”



### **Where Will an Industry Be in Five Years?**

“Program advisors know what’s going on in their world, but not across the world”



### **What New Professions and Credentials are Coming?**

“Government statistics show where the puck is, not where it’s going”

# For-Profits Raising Ante on “Workforce Solutions”

## Addressing Influential Employers’ Practice-Preparation Gaps

**Built for Deep Industry and Market Insight**



**Boots on the Ground in Major MSAs**

- Hundreds of FTEs across IT, business, education, criminal justice, and health care
- Track national trends; MSA-specific employer outreach

**From Theory to Practice**

- Customize generic programs to local market priorities
- RN→BSN; Health Administration

**Corporate Outreach 50% of Enrollments?**

- Corporate partnerships over time at least as important as direct-to-student marketing
- Students will still pay, but employers will “steer” to preferred educators

**Customized RN → BSN with Major Health System**



**Goal-Centric Curriculum**

Special modules on employer’s clinical quality and patient satisfaction priorities



**Simulations Designed and Taught by Health System Staff**

Health system RNs build real-world simulations for course inclusion



**Career Path Mapping**

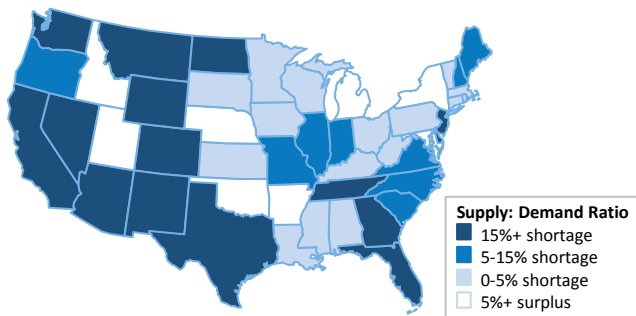
Maps certificates and degrees to alternative RN career paths for “lifelong learning” re-approach

# Health Care Still Massive, but No “Field of Dreams”

*Demand Shifting, Competition Increasing across High-Profile Disciplines*

## Nursing Shortage Real, but Morphing

*Projected RN Deficit, 2015*



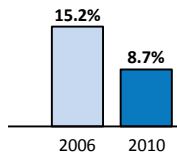
## Health Administration Programs

*Plentiful, Hard to Distinguish*

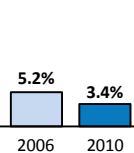
- |  |                                  |   |
|--|----------------------------------|---|
| Appalachian State University             | Florida A&M University           | Pennsylvania State University               |
| Auburn University                        | University of Nevada - Las Vegas | Southern Illinois University - Carbondale   |
| California State University - Long Beach | George Mason University          | University of Alabama                       |
| Central Michigan University              | University of Baltimore          | University of South Dakota                  |
| Clayton State University                 |                                  | University of Central Florida               |
| Dillard University                       |                                  | University of Connecticut                   |
| Drexel University                        |                                  | University of Michigan - Flint              |
| East Carolina University                 |                                  | University of North Florida                 |
| Methodist University                     |                                  | University of North Carolina at Chapel Hill |
| Metropolitan State College of Denver     |                                  | Texas State University San Marcos           |
| Old Dominion University                  | Tennessee State University       | Weber State University                      |
| Oregon State University                  | Stonehill College                | Winthrop University                         |
| University of Southern Indiana           | Idaho State University           | Towson University                           |
| Georgetown University                    | James Madison University         |   |
| University of Wisconsin - Milwaukee      | University of Scranton           |   |
| Western Kentucky University              | Texas Southern University        |   |



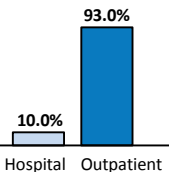
**Turnover Rate**  
*Excluding PRNs and Casual*



**Vacancy Rate**  
*FTEs*

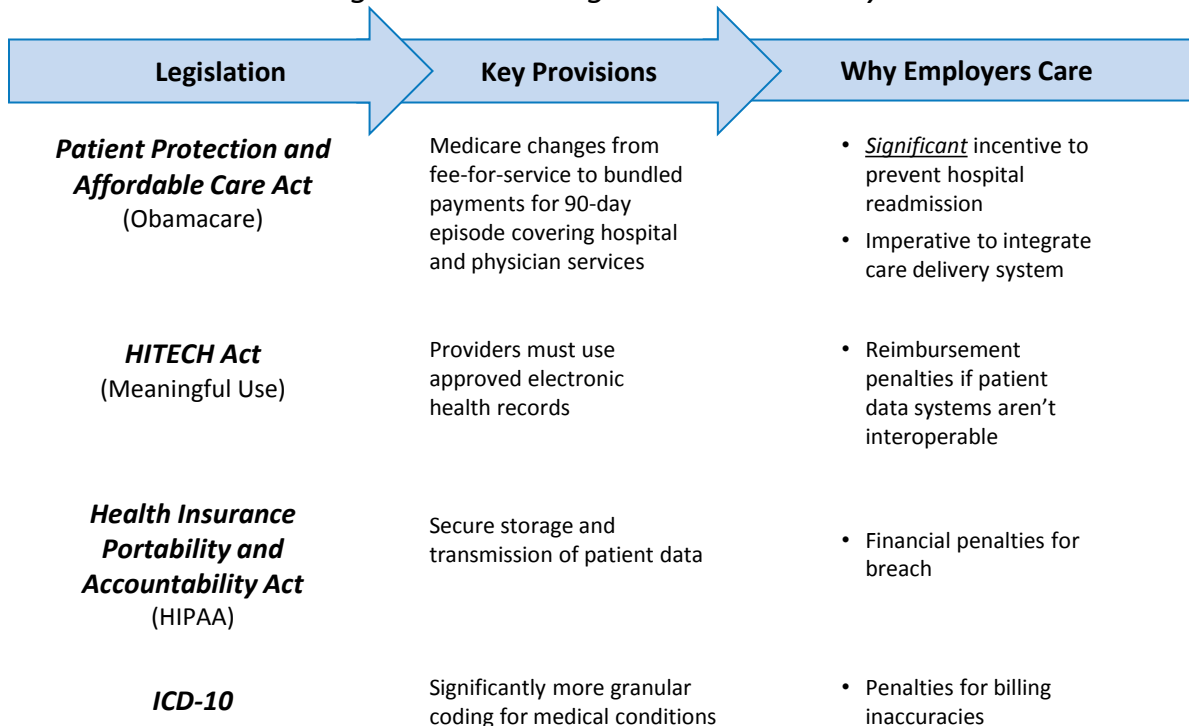


**Growth by Setting**  
*2004-2010*



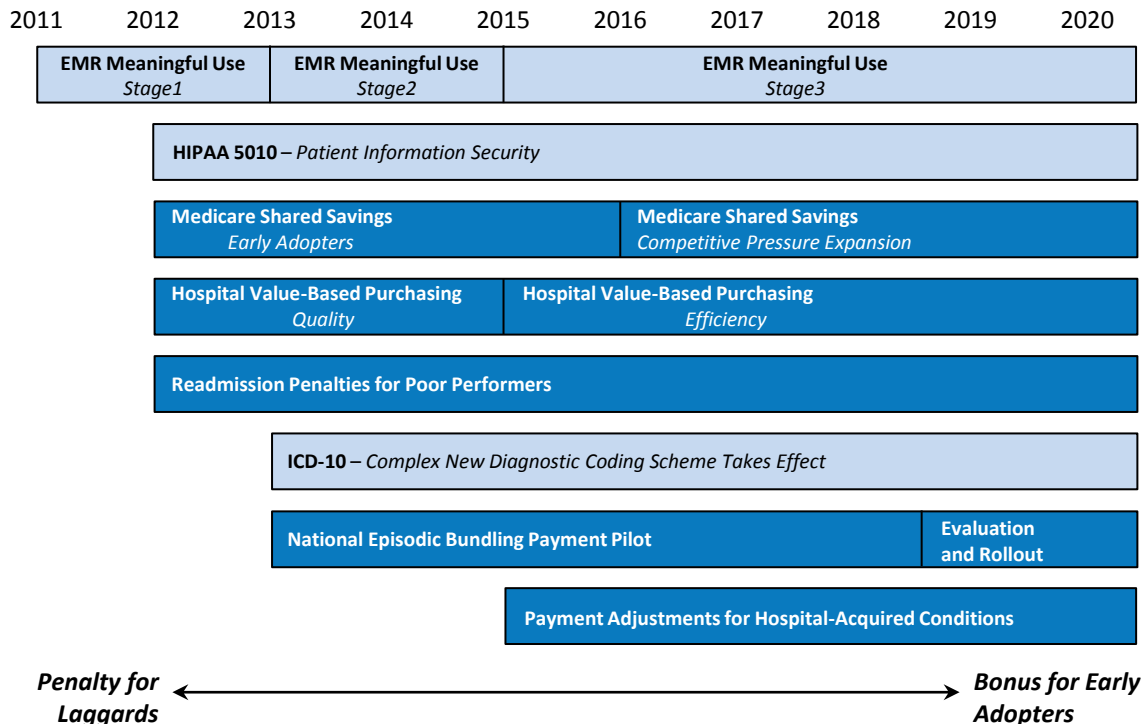
# Accountable Care in One Page

## Medicare Driving Massive Changes in Care Delivery and Health IT



# Consequential Deadlines for Rest of Decade

## Medicare's Timeline for Accountable Care Payment Rollout



# Voice of the Employer

## *Information You Can't Find in Student Surveys*

### ***Who We Talked To***

- ❖ Health Care CEOs
- ❖ HR Managers
- ❖ Clinical Leaders
- ❖ Professional Associations
- ❖ Consultants
- ❖ Government Agencies



### ***What We Listened For***

- ❖ Future of the Industry
- ❖ Financial and Regulatory Imperatives
- ❖ New Job Roles
- ❖ New Skills Required in Traditional Titles
- ❖ Opportunities to Apply Non-Clinical Courses for a Health Care Audience



# Industry Futures Series

## *In the Wake of Health Care Reform: Fast-Growth Jobs and Skills in the Decade Ahead*

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#### New Care Delivery Roles

- Top-of-License Practice
- Health Coaches
- Telehealth Nursing

### II

#### Business Skills for Health Workers

- Accountable Care Project Managers
- Interprofessional Care Team Leaders
- Electronic Medical Record Implementation Leaders
- Clinical Mobile Apps Specialist

### III

#### Health Informatics

- Hot Markets
- Critical Technical and General Skills
- Emerging Career Ladders

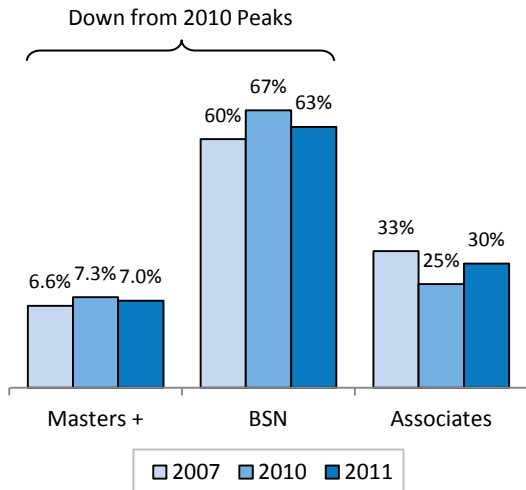


# Push for Advanced Nursing Degrees Not Seen in the Numbers

## *Employers Want Different Skills, Not Necessarily Masters Degrees*

### Pulling Back Nationally

#### **RN Education Degree Requirements** (From Online Job Postings)



### Markets Finding Their Own Equilibrium

	Masters +	BSN	Associates
<b>Charlotte</b>	13.5%	52.9%	33.6%
<b>Boston</b>	11.3%	74.6%	14.1%
<b>Chicago</b>	10.6%	48.7%	40.8%
<b>Seattle</b>	9.9%	72.2%	17.9%
<b>Los Angeles</b>	5.7%	71.2%	23.1%
<b>Atlanta</b>	3.7%	59.4%	36.9%
<b>Amarillo</b>	3.3%	27.9%	68.9%

# Integrating Inpatient and Outpatient Care a Top Priority

*Re-Skilling Existing Staff Even More Important than Growing Workforce*



**What is Your Top Issue for the Next Two Years?**

*(n = 86 Health System CEOs)*

## Ranking 46 Strategic Priorities

- #1 Creating the Integrated Delivery System of the Future
- #2 Making Money Under Medicare Reimbursement Reform
- #3 Transforming Primary Care
- 
- 
- 
- #34 Labor Strategies and Operating Expenses

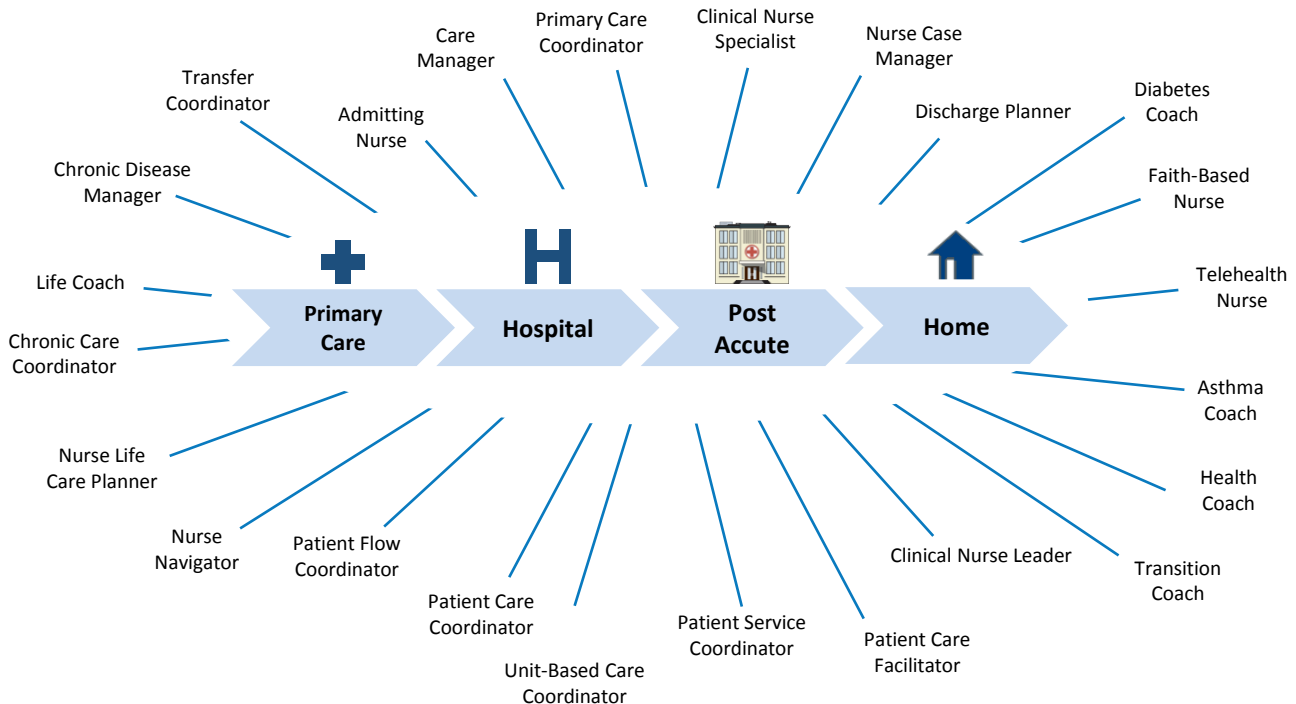
## Topping the Health Care Employer's Agenda

**New Roles for Existing Staff**  
 Keen Employer Interest in Cross-Continuum Care, aka the "Medical Home" Model

**Adding More Staff**  
 Less Interest in "More Bodies" Doing Traditional Tasks

# Proliferation of Care Coordination Roles

## *New Job Titles Encountered in Health Care Research*

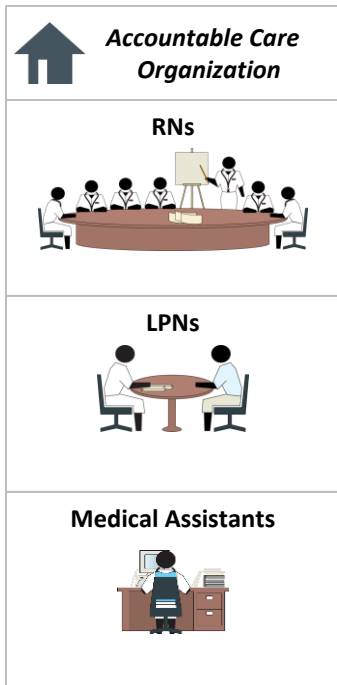


# Top-of-License Practice

*Accountable Care Depends on Performing Higher-Value Tasks Independently*

## Caregiver Requirements

## Upskilling Need



↓ **Do Less**

↑ **Do More**

📅 Initial Assessments

🩺 Routine Bedside Care

📅 LPN Team Mentoring

🩺 Complex Care

📅 Rooming Patients

🩺 Basic Screening

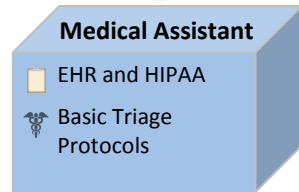
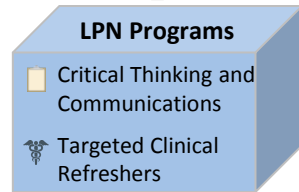
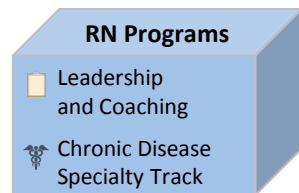
📅 Holistic Patient Histories

🩺 Broaden Bedside Care Skills

📅 Schedule Visits

📅 Pre-Visit Client Review

🩺 Triage Physician Messages



# Prime Targets for Clinical Refresher Courses

## *LPN Clinical Skills Requirements in Kaiser Permanente Top of License Training*



LPN trainings in Oregon

- ✓ Administer medications—IM, SubQ, PO, intradermal, inhalations, topical, rectal, vaginal, ophthalmic, nasal
- ✓ Administer narcotics including wastage
- ✓ Adult immunizations
- ✓ Anti-embolic stockings
- ✓ Application of “soft” splints, immobilizers and give pt. instructions
- ✓ Application of U-bags
- ✓ Assist with circumcisions
- ✓ Audiogram/Hearing Test/Screening—adult and/or pediatrics
- ✓ Bladder scanner
- ✓ Cast removal
- ✓ Central line dressing changes and management
- ✓ Changing O2 tank
- ✓ Crutch management/cane walking reinforcement and give pt. instructions
- ✓ Developmental screening tests—e.g., ASQ
- ✓ Ear and eye irrigation
- ✓ Head circumference
- ✓ Intravenous infusions—initiates, monitors including pumps, manages and administers medications
- ✓ Irrigations—bladder, wound
- ✓ LOPS testing
- ✓ NG tube insertion and care
- ✓ Obtaining culture specimens—throat, nasal, wound, nasopharyngeal
- ✓ Oxygen administration per nasal cannula, face mask
- ✓ Peak flow measurement
- ✓ Pediatric immunizations
- ✓ Point of care testing
- ✓ Pulse oximetry
- ✓ Suctioning—oral, nasal route
- ✓ Suture and staple removal
- ✓ Tracheotomy tube care
- ✓ TST
- ✓ Urinary catheterizations
- ✓ Vital signs/orthostatic BP
- ✓ Visual acuity
- ✓ Weight/height measurements
- ✓ Wound care—measurement of wounds, simple and complex (e.g. unnaboot, compression dressings, etc.), ostomy, focused assessment of wound healing

**Caveat:**  
Consult  
State  
Regulations

# Health Coaches

## *Patient Education to Prevent Unnecessary Readmissions*

### Key Elements of Health Coach Role



- RN/LPN
- Community Member

#### Medication Adherence



Reviews discharge medication list with patient and answers any questions

#### Disease Education



Ensures patient knows disease progression early warning signs and how to respond appropriately

#### Personal Health Record



Helps patient create a folder of important health information to share with providers

#### Physician Follow-Up



Scheduling and complying with timely PCP appointment

#### Chronic Care

- Diabetes
- Pharmacy



#### IT Systems

- Disease Registry
- EMR/PHR

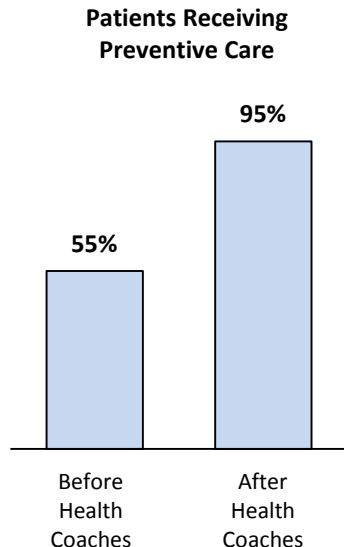


#### Communications

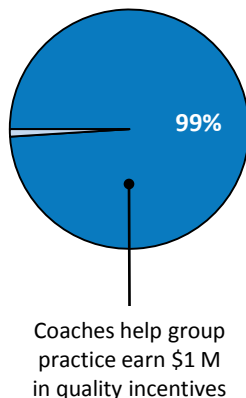
- Coaching
- Gerontology

# Health Coaches Post Immediate Clinical and Financial Benefits

## Immediate Benefits to Medical Practices



## Primary Care Physicians Receiving Medicare Bonus



## Surprisingly Strong Results with Non-Clinical Coaches



### Community Asthma Coaching

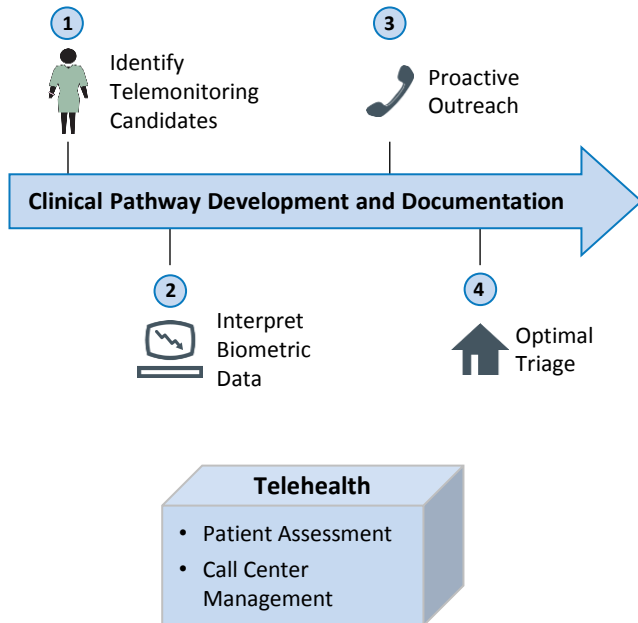
- Missouri hospital wins grant for short program for laypersons to coach asthma patients
- Emphasis on educating parents and navigating health care system



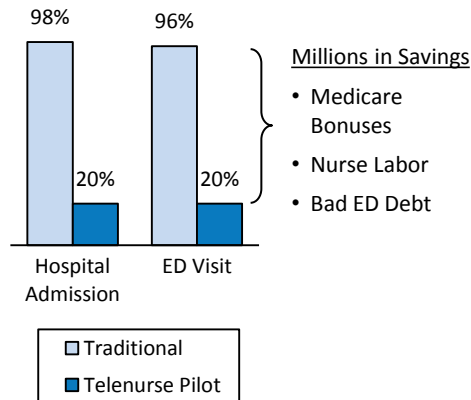
**52% Reduction in Hospitalizations**

# Telehealth Nursing

*Remote Monitoring and Preventive Interventions of High-Risk Patients*




**CHF Telenurse Program – Texas Hospital**






## A Taxonomy of New Accountable Care Roles

		Capsule Description	Other Common Names	Individuals Commonly Deployed
Inpatient	<b>Inpatient Care Coordinator</b>	Serves as a primary contact for physicians and other care providers; responsible for managing patient care needs and progress, care plan development, and discharge planning	Primary Care Coordinator, Patient Care Coordinator, Unit-Based Care Manager, Hospital-Based Case Manager	RN, CNL, LCSW, Case Manager
Outpatient	<b>Co-Morbidity Chronic Care Coordinator</b>	Follows patients deemed heavy users of expensive inpatient care due to multiple chronic illnesses, high ED utilization, or recent discharge from a SNF; promotes more active and informed patient role in self-care	RN Chronic Care Coordination (CCC) Coordinator, Chronic Disease Manager, Team Member, Health Coach, Faith-Based Community Liaison	RN, LCSW, MA, Case Manager, Community Member
	<b>Telehealth Nurse</b>	Utilizes technological resources to prevent complications associated with chronic health conditions to avoid hospital admissions	IT-Based Care Coordinator	RN

## A Taxonomy of New Accountable Care Roles

	Capsule Description	Other Common Names	Individuals Commonly Deployed
<b>Non-Urgent Care Navigator</b>	Directs patients to the appropriate site of care, often diverting inappropriate ED and acute care utilization	Life Coach, Transfer Coordinator	RN, LPN
<b>Clinical Patient Concierge</b>	Provides guidance to patients, families, and physicians during acute inflection points in health care (such as cancer diagnosis) or catastrophic illness; coordinates care and expedites scheduling	Nurse Navigator, Nurse Life Care Planner	RN, NP, Social Worker, Survivor
<b>Disease-Specific Chronic Care Coordinator</b>	Counsels patients regularly regarding disease-related symptom management and advises patients on lifestyle choices to improve prognosis	Diabetes Coach, Chronic Disease Manager (Cardiac Specific), Asthma Coach	RN, NP, Pharmacist, Community Member
<b>Health Coach</b>	Follows patients from the hospital to their homes or PAC facilities after discharge, supporting patient self-management during the transition	Transition Partner	RN, NP, Nursing Student, Community Member

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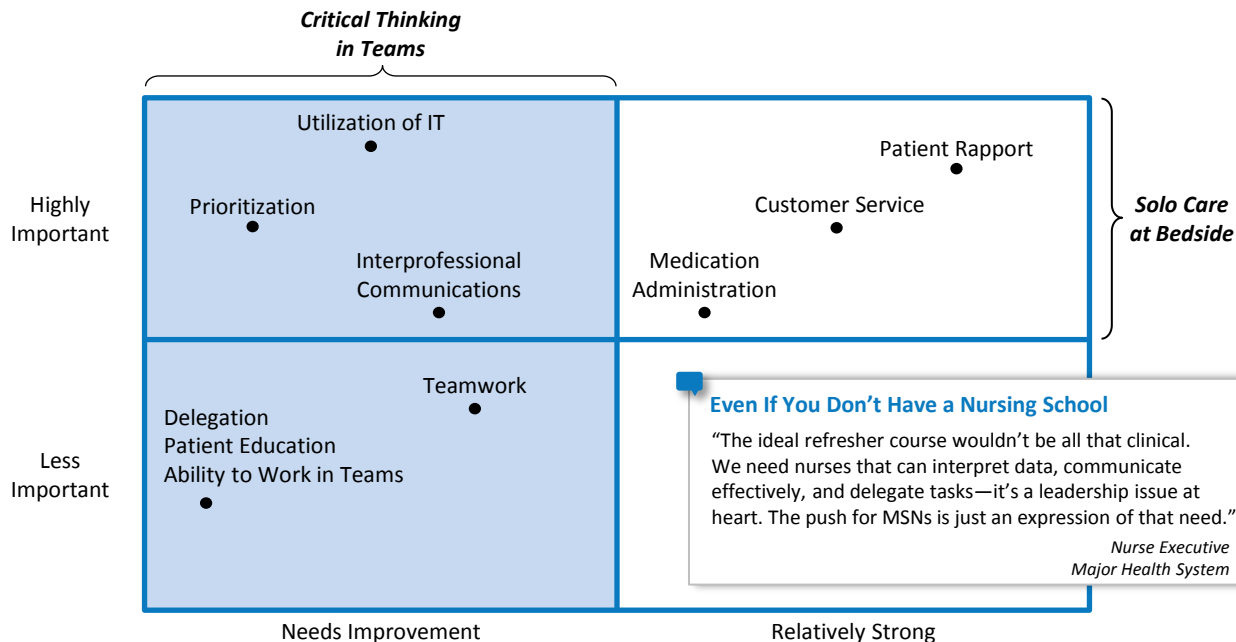
- Hot Markets
- Critical Technical and General Skills
- Emerging Career Ladders

# Florence Nightingale, Meet Stephen Covey

## *Growing Premium on Critical Thinking Skills among Caregivers*

### **What Are the Most Important Competencies in New Nursing School Graduates?**

(n = 3,600 Nurse Managers)

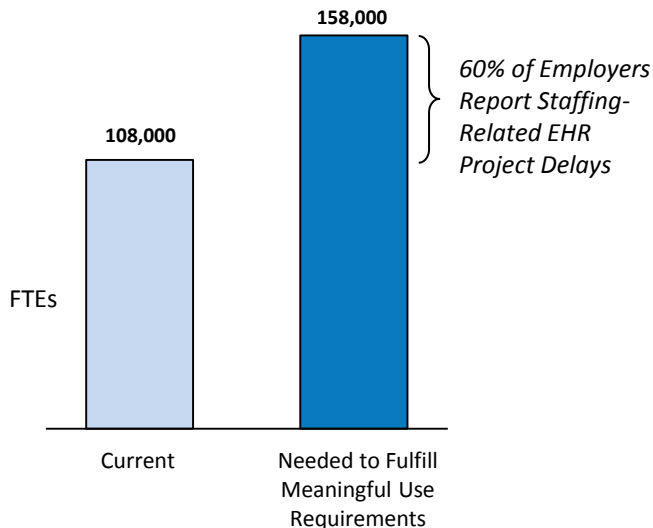


## Cross-Training Care Providers in IT

*More Employers Looking Inward to Staff Critical Projects*

### Health Employers Face IT Skills Shortage

Health IT Staff Needs



### Hard to Get IT Pros Interested in Health Care

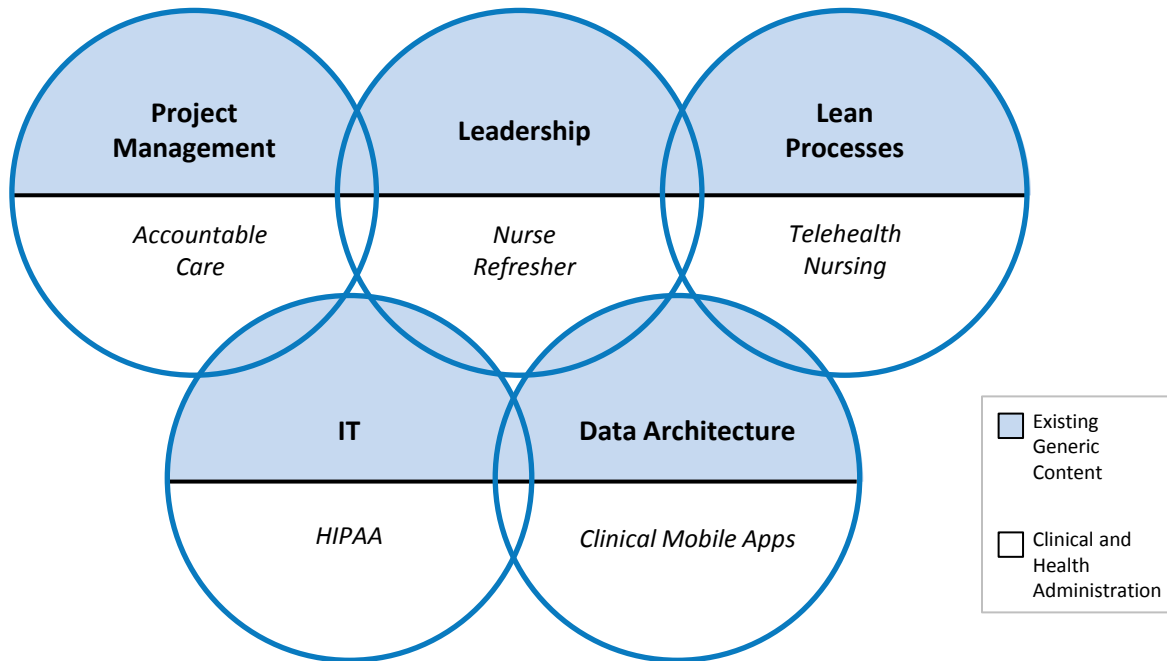
“Health care doesn’t pay as well as other industries, and there’s tons to learn about clinical processes and regulations that doesn’t mean anything outside the sector. A lot of people are concluding it’s cheaper and better to retrain their own clinical staff to manage IT projects than to recruit IT pros and teach them health care.”

*Director  
HIMMS*

# A Health Care Spin on Generic Curriculum





















*Mixing and Matching Existing Courses into Employer-Friendly Programs*

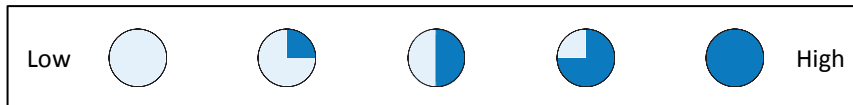
**Certificate and Contract Education Opportunities for Community College Leaders**



# Building Programs Around “Must-Do” Projects

*Cross-Training Opportunities at the Intersection of Industry-Specific and General Skills*

Health Care Role	Project Management	Leadership and Critical Thinking	Lean Processes	Information Technology	Data and Web Design	Health Care Content
Accountable Care Project Director <i>RN, MD, Finance</i>						Principles of Accountable Care and Population Health
Interprofessional Team Leader <i>RN, Case Manager</i>						Health Care MBA track
EHR Project Director <i>HIT, RN, Finance</i>						HIPAA
Clinical Mobile Applications <i>CMIO, MD, RN, HIT</i>						Clinical Pathways and HIPAA



# Health Care-Related Topics for Another Session

*Demographic and Scientific Tailwinds, but Unproven Employer Demand*



**The Era of  
Mass Longevity**  
*Services for “Super  
Seniors” Age 80+*

*Professionalizing Facility  
Administration*

- Rehab Facility Management
- Assisted Living Management
- Hospice and Palliative Care

*High-End Home Health*

- Geriatric Social Work
- Alzheimer’s Disease Management
- Aging-in-Place Home Remodeling



**Mainstreaming  
Advanced Technology**  
*Professions and Certifications as  
Cutting-Edge Science Goes “Retail”*

- Personalized Medicine
- Proton Therapy Tools



**Interdisciplinary  
Public Policy**  
*Health Care Concerns in  
Global Trade and Security*

- Global Food Safety
- Bioterrorism



**Certified Aging-in-Place Specialist (CAPS)**



Business Management for Building Professionals



Marketing and Communications



Design for Aging and Accessibility



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#### Health Informatics

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## Defining Our Terms

*"Informatics" and "IT" Too Often Used Interchangeably*

*Clinical Quality  
Improvement*



**For Today's Purposes**



***Clinical Informatics = Evidence-Based Medicine***

Statistically defining clinical best practices and supporting provider decisions



***Health Informatics = Cross-Continuum Connectivity***

Storing, transmitting, and analyzing clinical and administrative data



***Health IT = Electronic Record-Keeping***

Secure capture and sharing of patient data and accurate medical coding

*Patient  
Data Capture*

## Burning Glass in Brief

### *Real-Time Analysis of Employer Demand*



- Boston-based, 140+ staff in four continents
- Leading developer of technology for career planning, labor market analytics, and workforce development
- Clients include government agencies, private companies, institutions of higher education
- “Spidering” technology aggregates online job postings in the U.S., Canada, and U.K. to build industry’s most complete jobs database
  - Major Job Boards
  - National and Local Employer Websites
  - Craigslist

# Patented Technology Parses “Natural Language” Postings

## Tool Understands, Codes, and Categorizes Dozens of Facts about Each Job

### Company Profile

Clark Research International (CRI) offers a breadth of multidisciplinary skills in research science, policy analysis, data analysis, and data collection and analysis.

### Conventional Extracts:

- **Job title:** IT Project Manager
- **Occupation Code:** 15-1099.11 (Information Technology Project Managers)
- **NAICS** 541690 (Other Scientific and Technical Consulting Services)
- **Location:** Boston

### Occupation

a full-time IT project manager. He/she must be able to establish partnerships; communicate with managers; and be able to develop operational and technical solutions. Background with software development in C++, with experience in project management. Responsibilities include estimating, documentation, process management, and training.

### Salary & Benefits

Salary: \$70,000 per year. Benefits: dental, and child care available. Education: BA/BS with 2 - 4 years of experience or equivalent combination of education and experience. PMP Certification required.

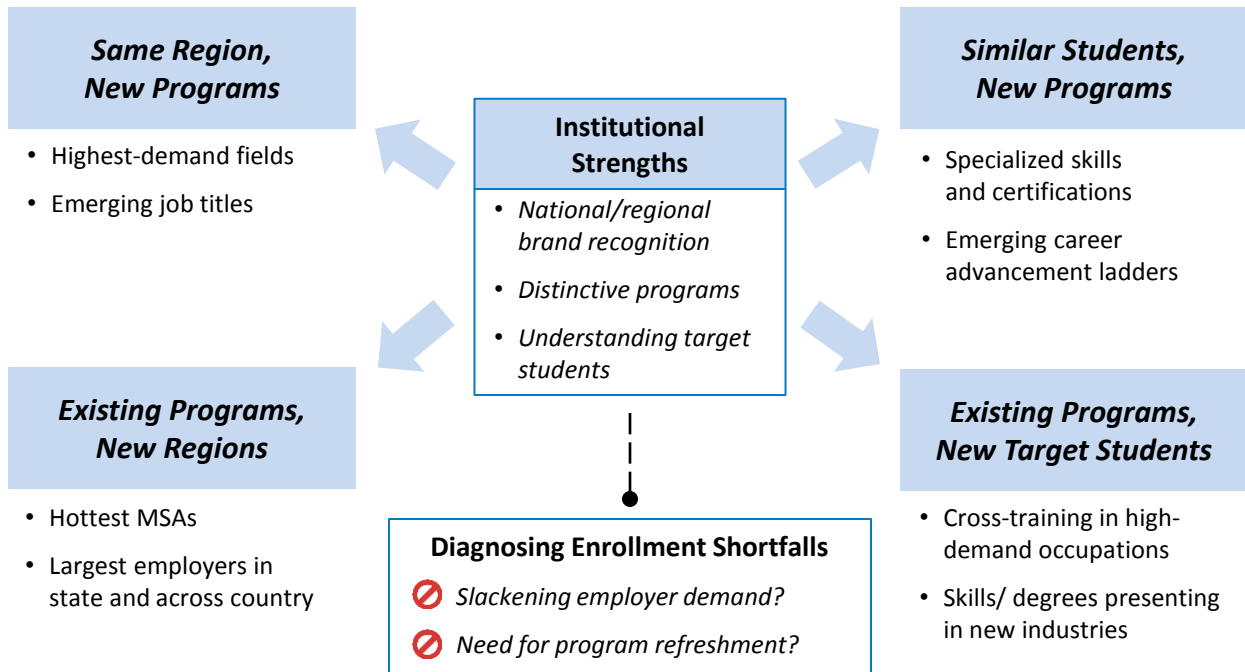
### Burning Glass Added Extracts:

- **Full location:** MSA (14460); LMA (MT257165); Geocode: 42.3597, 71.0560
- **Min experience:** 2-4 years, Level=2
- **Education Attainment:** Bachelor's
- **Major:** Computer Science,
- **Salary:** \$70,000 base salary
- **Benefits:** Medical, Dental, Wellness, Childcare
- **Type of Job:** Full-time
- **General Skills:** Collaboration; Communications
- **Specific Skills:** IT Design; Process Improvement; Testing; C++, Sybase
- **Certifications:** PMP
- **Number of Positions:** One posting

**PLUS DOZENS OF OTHERS**

# Testing the Right Path for Growth

*Employer Data Informs How Best To Leverage Institutional Strengths*

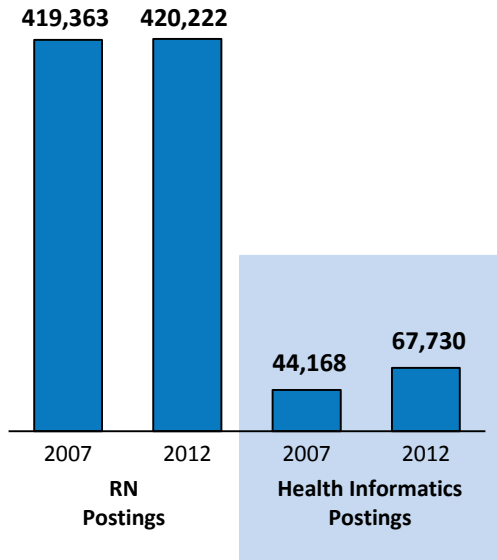


# Health Informatics: Growth Niche in a Flat Market

*Nursing Still Bigger, but Informatics Rapidly Increasing Share of Employer Demand*

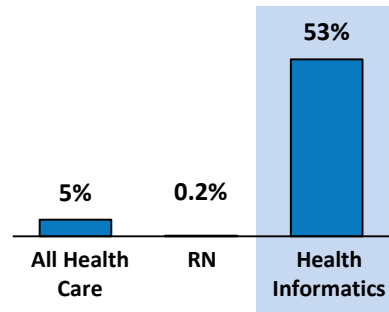
## Only Small Rise in Demand for RNs...

*Unduplicated Job Listings*

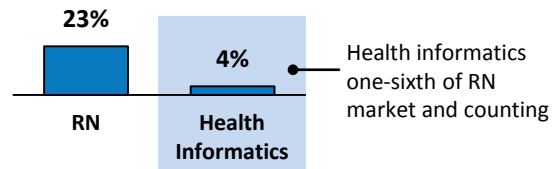


## ...But Health Informatics Exploding

*Job Listing Growth, 2007-2012*



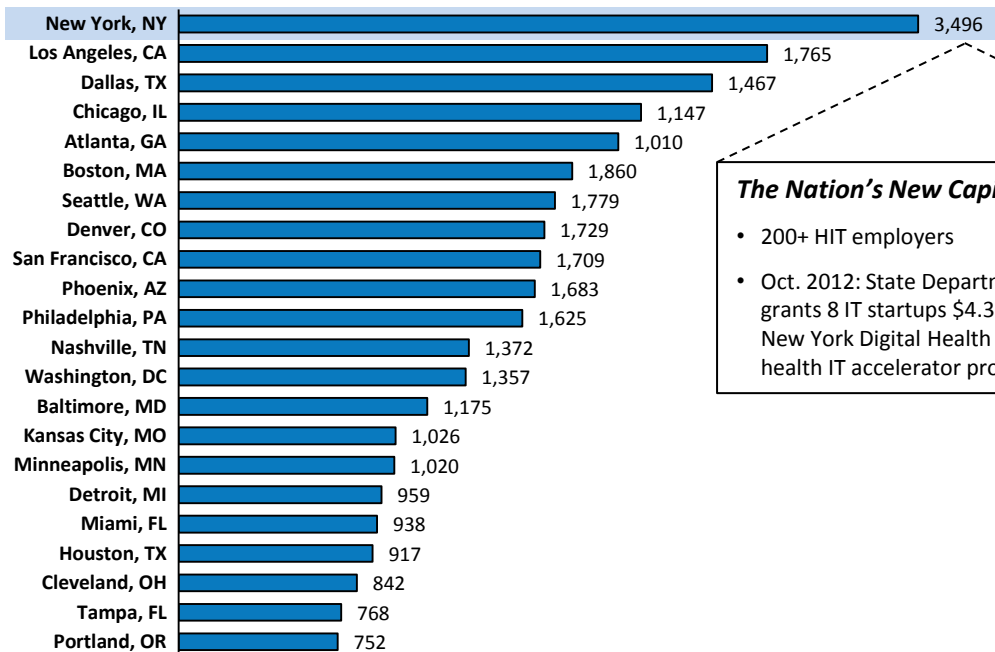
*Percentage of Total Health Care Listings*



# What Cities Have the Hottest Markets?

*Some Markets “Punching Over Their Weight”*

## Top MSAs for Health Informatics Job Postings, 2012

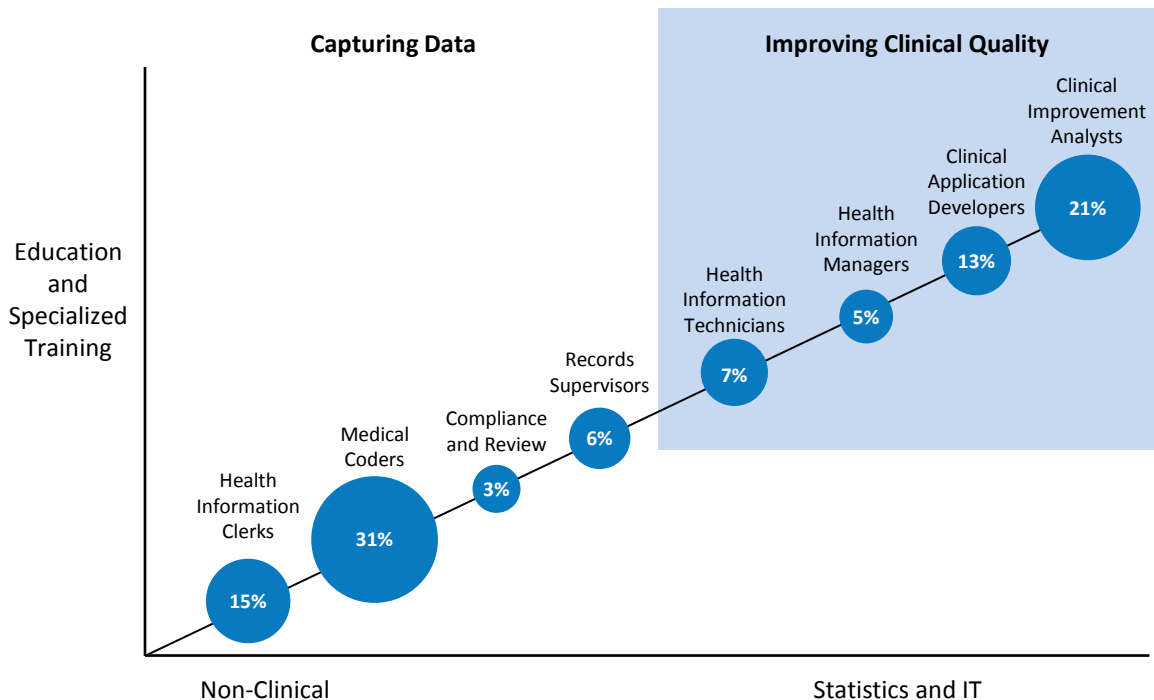


***The Nation’s New Capital of Health IT***

- 200+ HIT employers
- Oct. 2012: State Department of Health grants 8 IT startups \$4.3M through the New York Digital Health Accelerator, largest health IT accelerator program in the U.S.

# What Job Categories are in Highest Demand?

*Percentage of Health Informatics Listings by Job Type, 2012*

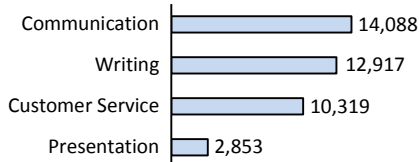




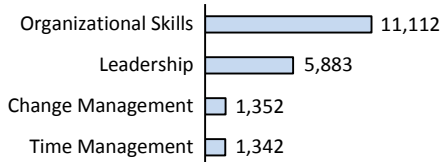
# Highest-Demand General Skills for Health Informatics

## *Communications and Organizational Skills Required Across All Job Categories<sup>1</sup>*

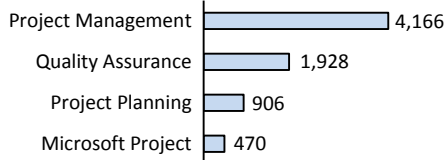
### Communication and Coordination



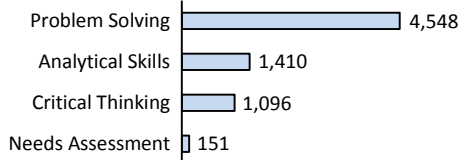
### Business Environment



### Project and Process Management



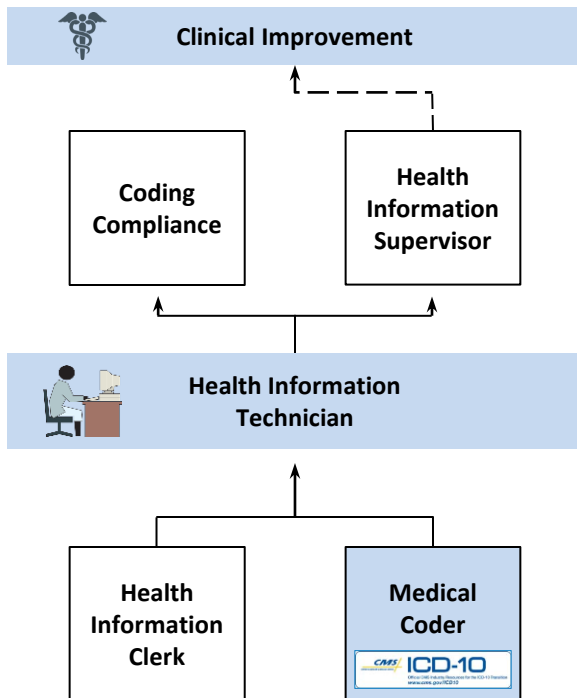
### Problem Solving



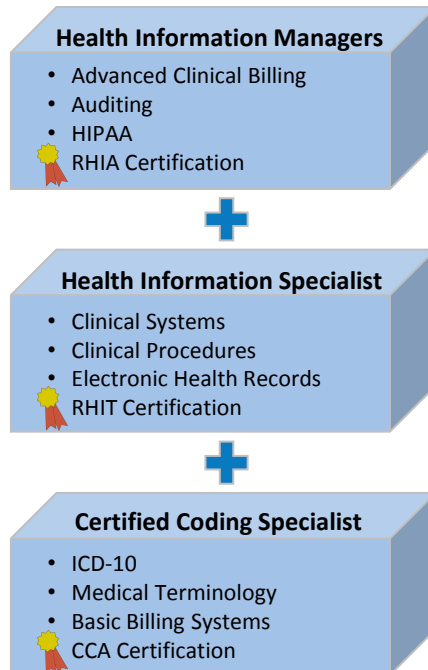
# Are Career Ladders Emerging?

## *A Ten-Year Roadmap for Medical Coders*

### An Emerging Career Ladder

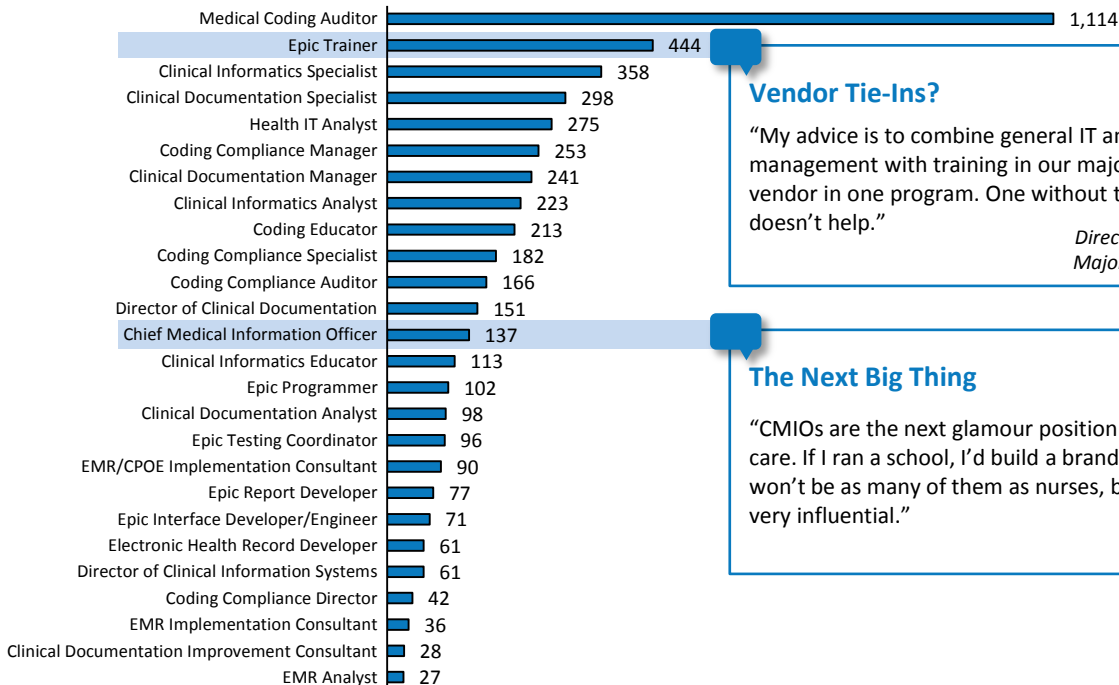


### Well-Suited for Career Path Mapping



# What New Job Titles Are Candidates for Tailored Programs?

## Most Common Titles in H1 2011 Job Postings



### Vendor Tie-Ins?

“My advice is to combine general IT and project management with training in our major software vendor in one program. One without the other doesn’t help.”

*Director of Clinical IT  
Major Health System*

### The Next Big Thing

“CMIOs are the next glamour position in health care. If I ran a school, I’d build a brand here. There won’t be as many of them as nurses, but they’ll be very influential.”

*Director  
HIMMS*

## Sizing the Opportunities

*High-Level Grades for Growth Potential and Delivery Complexity*

	Current Market	Growth Potential	Clinical Requirements	Online Delivery Potential
<b>Top-of-License</b>	A	B	High	D
<b>Health Coach</b>	C	A+	Medium	B
<b>Telehealth Nursing</b>	D	B	Medium	B
<b>Clinical Improvement Analyst</b>	C	A	Medium	B+
<b>Health Information Technician</b>	B	A	Low	A
<b>IT/Project Management</b>	A	A	Low	A
<b>Interprofessional Team Leader</b>	B	B	Medium	C


# Questions to Ask Your Program Workforce Boards

## *How Fast Will My Market Embrace Accountable Care?*

### Leading Indicators of Employer Demand

- 1 ***Is the Market Dominated by One or Two Large Systems, or Still Highly Fragmented?***  
Market concentration conducive for integrated care delivery
- 2 ***What Percentage of Physicians are Owned by Health Systems or Large Physician Groups?***  
Absent ownership, hard for physicians to accept population risk
- 3 ***How Much of Area Hospitals' Revenues are from Traditional Fee-for-Service versus Bundled or Risk-Based Payments?*** The more risk, the more interest in new care and IT roles
- 4 ***Are Any Area Health Systems Participating in the Medicare Accountable Care Organization Pilot Program?***  
Participants are highly motivated to cross-train and upskill staff; good contract education candidates
- 5 ***Are Health Systems Engaging Consulting Firms (like Deloitte, Premier, or McKinsey) for "Care Transformation," "Accountable Care Readiness," or "Ambulatory IT" Projects?***  
You'll have to ask; this information won't be in the papers

### Bearish Signs for Accountable Care

- 6 ***Are Local Health Systems Announcing Major Layoffs or Cost-Cutting Programs?***  
Sure sign of retrenchment; no mood for big ideas
-  ***Did Congress Just Announce Major, Multi-Year Medicare Payment Reductions for Providers?***  
If so, don't bother with any of the questions above

# Health Care Crowding Out Higher Education

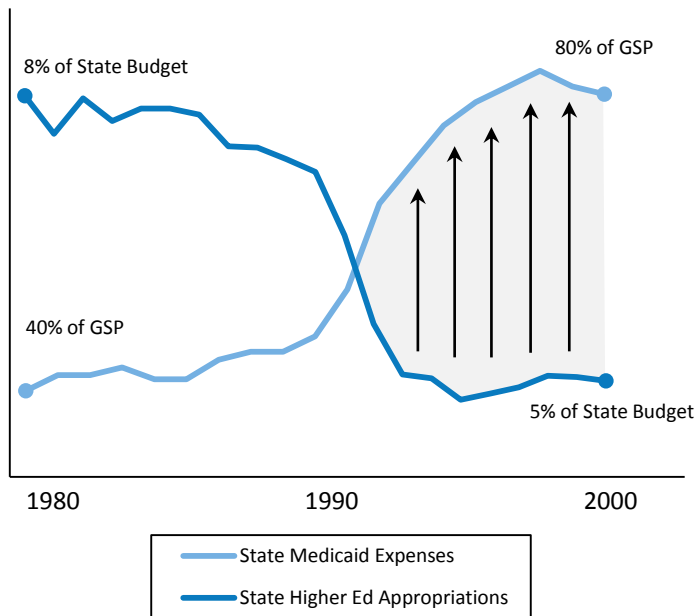
## *Improving Local Health Care Indirectly Helps Institutional Funding*



“Projected increases in Medicaid costs over the next several decades raise serious questions about the future path of state appropriations for higher education.”

*Peter Orszag*  
*Urban-Brookings Tax Policy Center, 2003*

### State Higher Education and Medicaid Expenditures



Source: David Gunter, Thomas Kane, and Peter Orszag, “State Fiscal Constraints and Higher Education Spending: The Role of Medicaid and the Business Cycle,” The Urban-Brookings Tax Policy Center, 2003; Advisory Board interviews and analysis.

# How College Leaders Are Using Real-Time Employer Analytics

## *Spotting Trends Early, Refining Capacity Planning*



### Sizing Demand for New Programs

- » *What are the fastest-growing occupational sectors in my county, state, and region?*
- » *Is there sustained employer demand for an emerging job category?*
- » *What is the minimum degree or certification “required” or “preferred” for a given occupation?*
- » *Who are the employers—large and small—looking for the skills we teach?*



### Keeping Existing Programs Aligned

- » *What specialized skills are in rising (or declining) demand?*
- » *Are there opportunities for “hot skills” concentrations within a larger program?*
- » *Are predictable career advancement pathways emerging within a field?*
- » *Can we design “stackable” curriculum?*

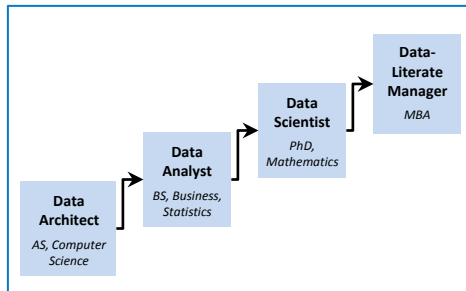
### Selected Community Colleges Using Burning Glass

- Central Piedmont Community College
- Kentucky Community College System
- LaGuardia Community College
- Lone Star Community College System
- Macomb Community College
- Mount Hood Community College
- Northwest Technical College System
- Southern Maine Community College

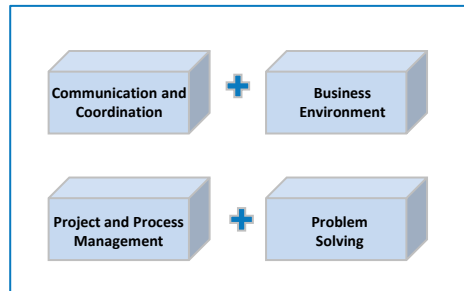
# 360-Degree Sector Analysis

*The Forum's Newest Research Partnership with Burning Glass*

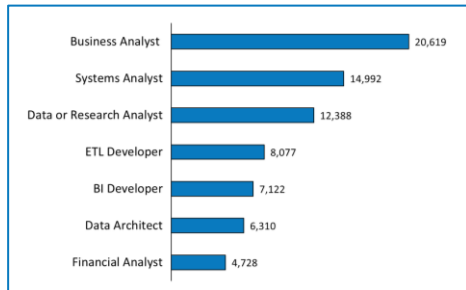
## Emerging Career Ladders



## Highest-Demand Skills and Credentials



## Top Job Titles



## Regional Market Analysis

