

EXECUTIVE SUMMARY

This report synthesizes key information on the health care workforce in South Central/Southwest Wisconsin. Based on a subset of area health care employers surveyed in Spring 2013 (see list of participating employers, right), it provides a snapshot of the current workforce in 40 key occupations, and it projects near-term changes in that workforce based on future retirements and employers' anticipated staffing needs. Comparing the 2013 results to those of a nearly identical survey administered in 2008 allows us to assess key changes and continuities in the region's health care workforce over the last five years, and to gauge the accuracy of the 2008 predictions.

The health care workforce in the region has expanded over the last five years, an unsurprising finding given the region's aging population and their associated health care needs. More surprising was the precision of employers' 2008 projections across all occupations, given the economic turbulence of the last five years: employers predicted an overall workforce growth of eight percent between 2008 and 2013, and this is precisely what happened. Workers in 2013 were also slightly older than in 2008, and worked slightly more hours.

In both 2008 and 2013, Registered Nurses have employed the largest number of health care workers in both urban and rural facilities. In 2013, RNs made up a full 50 percent of the 10,523 member healthcare workforce covered in the survey, and the occupation is projected to grow by 101 jobs (FTE) over the next five years. Combining employers' staffing projections with employees' current age profiles and hours worked reveals that more than 520 new Registered Nurses will be needed in the next five years.

While RNs produce the largest numbers and the education and training of these workers will continue to be important into the near-term future, our data also reveal that significant numbers of Nursing Assistants, Medical Assistants, Respiratory Therapists, Physical Therapists, and Medical Technologists will be needed in the region. In contrast, the workforce in other occupations—namely, Medical Transcriptionists and LPNs in rural hospitals, and Phlebotomists in urban hospitals—is projected to contract, a continuation of a longer-standing decline. Hospitals in our survey experienced a reduction in the CNA workforce between 2008 and 2013; however changes in employment of CNAs are dominated by trends in other parts of the health care industry, outside hospitals.

Participating Health Care Facilities

Beaver Dam Community Hospitals, Inc.

Boscobel Area Health Center

Columbus Community Hospital

Divine Savior Healthcare - Portage

Grant Regional Health Center - Lancaster

Meriter Health Services - Madison

Monroe Clinic

Reedsburg Area Medical Center

Sauk Prairie Memorial Hospital and Clinics

St. Clare Hospital and Health Services -

Baraboo

St. Mary's Hospital - Madison

St. Mary's Janesville Hospital

Stoughton Hospital

UW Hospital and Clinics - Madison

*Facilities in bold text completed both the 2008 and 2013 surveys.

Funding for the project was provided by the Workforce Development Board of South Central Wisconsin. In addition to our funders, we thank the various health care institutions participating in the project. For more information on the report and its content, contact: Laura Dresser, ldresser@cow.org, 608.262.6944, or Michele Mackey, mmackey@cow.org, 608.262.1839. Copies of this report can be accessed at www.cow.org.

About COWS

Based at the University of Wisconsin-Madison, COWS is a national think-and-do tank that promotes "high road" solutions to social problems. These treat shared growth and opportunity, environmental sustainability, and resilient democratic institutions as necessary and achievable complements in human development. COWS is nonpartisan but values-based. We seek a world of equal opportunity and security for all.

Urban and rural hospitals exhibit many similar trends, but also show notable differences. The rural healthcare workforce is older than the urban workforce, and its employees have slightly higher rates of part-time work across all occupations. Urban hospitals grew at a faster rate than rural hospitals between 2008 and 2013, and employers' projections suggest that urban hospitals will continue to grow at a slightly higher rate between 2013 and 2018.

This report provides important information for continuing dialogue on the region's health care workforce, and for initiatives that can sustain and improve the industry in the coming years.

Introduction

This report offers an in-depth analysis of the state of the health care workforce in Wisconsin's South Central/Southwest region. In addition to providing a current picture of the region's health care workforce in selected occupations, it highlights changes and continuities over the last five years, and it forecasts regional workforce needs into the near-term future.

This report presents workforce data from 14 area health care facilities, most providers of hospital services. The participating facilities represent a broad geographic area, serving both urban and rural communities. While not comprehensive of the entire health care system, this report provides a regional picture of health care employment currently and into the future.

The bulk of the report draws on a Spring 2013 survey administered to 14 area health care employers. The survey gathered information on the age and demographic profile of 40 key health care occupations, and it asked employers to project changes to staffing levels in these occupations over the next five years. A similar survey administered to a subset of employers in 2008 provides a basis for comparison, and allows for analysis of trends over the past five years. It also allows us to gauge the accuracy of the 2008 predictions.

A list of the 14 hospitals* participating in the 2013 survey is provided on the first page of this report, and the 40 health care occupations considered are listed on the next page. Of course, the health care

facilities participating in the survey, and the occupations covered, comprise only a subset of all health care employers and workers in the region. That said, the participating hospitals represent wide geographical coverage and include the largest employers in the region, and the occupations considered here include those that employ the largest number of workers in the health care field. Thus, while the picture we draw in this report is incomplete, it provides an excellent representation of the state of the health care workforce in the region.

We present data for all participating hospitals in the region, and we also split that data between urban and rural facilities. For each occupation, we provide data on aggregate employment (including both FTE and total headcount), age, and demographic profile within occupations, and change over the next five years in total employment as projected by employers. Comparison with an earlier survey allows us to assess recent workforce growth and contraction, as well as any shifts in the numbers or in the demographic profile of workers in key occupations.

In combination, this information provides a detailed regional picture of health care employment currently and into the future. The report can be helpful to hospitals and key education and training institutions in their efforts to prepare and train the region's future health care workforce.

*We use the term 'hospitals' interchangeably with 'health care facilities' in this report; the majority—though not all—of employers participating in the survey provide hospital services.

40 Survey Occupations

AODA counselor	Medical coder	Physical therapist assistant
Cardiovascular technician/technologist	Medical/Clinical lab technician (2-yr degree)	Physician assistant
Certified nurse specialist	Medical records/health information technician	Radiation therapist
Certified registered nurse anesthetist	Medical technologist (4-yr degree)	Radiography/radiologic technician
Clinical dietician	Medical transcriptionist	Registered nurse
CT/PET/MRI technician	Nuclear medicine technologist	Registered nurse manager
Dialysis technician	Nursing aide/assist/attendant	Respiratory therapist
Emergency medical technician/paramedic	Nurse practitioner	Respiratory therapy assistant/technician
Home health aide	Occupational therapist	Social worker/Medical social worker
Licensed mental health counselor	Occupational therapist assistant	Speech therapist
Licensed practical/vocational nurse	Pharmacist	Surgical technologist
Licensed psychologist	Pharmacy technician/assistant	Ultrasound technician
Mammography technician	Phlebotomist	
Medical assistant	Physical therapist	

Background and Survey Administration

In 2008, the Workforce Development Boards of South Central and Southwest Wisconsin and local educational institutions collaborated with area healthcare employers and the Center on Wisconsin Strategy (COWS) to conduct a comprehensive assessment of the healthcare workforce needs in the region. Three Madison-based hospitals and 12 hospitals from the Rural Wisconsin Health Cooperative (RWHC) participated in this comprehensive assessment. Human Resources staff at participating hospitals completed an internal employer survey, in which they accounted for current staffing levels in 36 selected occupations. Employers also projected the future workforce needs for these occupations over the next five years. COWS was contracted to design and analyze the survey, and the 2008 report is available on the COWS website at <http://www.cows.org/the-future-of-the-health-care-workforce-in-south-central-southwest-wisconsin>.

The survey was re-administered to area employers in May and June of 2013 to provide an update on the state of the region's health care workforce, and to facilitate analysis of trends over the five years elapsing between surveys. Employers were asked about a nearly identical list of occupations (40 occupations in total). The same Madison-based hospitals and nine of the 12 RWHC hospitals that participated in the 2008 survey also participated in 2013. One additional urban hospital (in Janesville) and one additional hospital from the RWHC also completed the 2013 survey. For the 2008/2013 comparisons made in this report, we use data only from the 12 hospitals participating in both surveys.

The survey instruments developed and used in both 2008 and 2013 were adapted from those developed by the Fox Valley Health Care Alliance (FVHCA). Parts of this report parallel the structure of the summary reports published in 2007 and 2012 by FVHCA for the Fox Valley region (see www.fvhca.org for the Fox Valley reports). A template of the survey developed for this report can be accessed at http://www.cows.org/_data/documents/1526.pdf.

The results of this report are organized into three sections. Section 1 presents results on 40 key occupations from the updated staffing assessment conducted in 2013. Section 2 compares key information from the 2008 and 2013 surveys, allowing for an analysis of continuities and recent changes. Section 3 provides general conclusions based on our analysis of past, current, and future trends.

*EMTs/Paramedics are not included in the employee counts from urban hospitals, because they are employed by another agency.