



Healthcare  
Workforce  
Commission

# Georgia Healthcare Workforce Commission Meeting One

August 29, 2022



# Commission Timeline

	Key Events	Key Deliverables by Staff to Commission
<b>July</b> Wednesday, 20th	<b>Commission Kickoff</b> <b>7/20 3p</b> Virtual Kickoff	<ul style="list-style-type: none"><li>• Identify and schedule interviews with known key stakeholders</li><li>• Healthcare workforce landscape (e.g., trends, pain points) and professions for focus</li></ul>
<b>August</b> Monday, 29th	<b>Meeting #1</b> <b>8/29 2:30p</b> Mercer University-Atlanta, Atlanta	<ul style="list-style-type: none"><li>• Analytics and material to support 1<sup>st</sup> meeting &amp; 1<sup>st</sup> open forum</li><li>• Preliminary insights from surveys and interviews</li></ul>
<b>September</b> Thursday, 29th	<b>Open Forum #1</b> <b>9/29 10a</b> Augusta University, Augusta	<ul style="list-style-type: none"><li>• Analytics and materials to support 2<sup>nd</sup> Commission meeting</li><li>• Fact base on the current workforce for each preliminarily identified profession.</li><li>• Fact base for scenarios on labor force entrants</li></ul>
<b>October</b> Tuesday, 18th	<b>Open Forum #2</b> <b>10/18 2:30p</b> Albany Technical College, Albany	<ul style="list-style-type: none"><li>• Analytics and materials to support 2<sup>nd</sup> Forum meeting</li><li>• Consolidated evidence base to use for alignment on final list of priority areas and professions</li><li>• Fact base on potential opportunities to close the healthcare gap</li></ul>
<b>November</b> Wednesday, 30th	<b>Meeting #2</b> <b>11/30 1p</b> TBD, Savannah, Georgia	<ul style="list-style-type: none"><li>• Analytics and materials to support 3<sup>rd</sup> Commission meeting</li><li>• Synthesis of interviews with leading training and educational organizations</li><li>• Draft final communications</li></ul>
<b>December</b> Monday, 12th	<b>Meeting #3</b> <b>12/12 1p</b> TBD, Atlanta, GA	<ul style="list-style-type: none"><li>• Consolidated material to socialize findings, direction, initial conclusions and next steps with all stakeholders</li><li>• Final communications outreach plan</li></ul>



# Georgia Healthcare Workforce Commission Meeting #1

Agenda

- |          |                                       |            |
|----------|---------------------------------------|------------|
| <b>1</b> | Review of Goals for Today             | 10 minutes |
| <b>2</b> | Review Healthcare Workforce Fact Base | 60 minutes |
| <b>3</b> | Q&A and Open Discussion               | 20 minutes |

# Today's Objectives



Review projections and trends in healthcare workforce demand and supply



Highlight perceived pain points within the healthcare workforce



Review input from the survey and interviews of Commission members

# This fact base focuses on seven healthcare workforce categories

## Primary Care

Examples:

- Family Medicine Physicians
- Nurse Practitioners

## Allied Primary Care

Examples:

- Medical Assistants

## Specialty Care

Examples:

- Surgeons
- Medical Specialists

## Allied Specialty Care

Examples:

- Respiratory Therapists,
- Physical Therapist Aides

## Dentistry

Examples:

- Dentists, General
- Dentists, All Other Specialists

## Allied Dentistry

Examples:

- Dental Assistants
- Dental Hygienists



## Nursing Care

Examples:

- Registered Nurses
- Licensed Practical and Licensed Vocational Nurses

## Allied Nursing Care

Examples:

- Nursing Assistants
- Home Health and Personal Care Aides

## Behavioral Healthcare

Examples:

- Psychiatrists
- Psychologists
- Therapists
- Counselors

## Allied Behavioral Healthcare

Examples:

- Psychiatric Aides
- Recreational Therapists
- Psychiatric Technicians

## Pharmacy

Examples:

- Pharmacists

## Allied Pharmacy

Examples:

- Pharmacy Aides
- Pharmacy Technicians

# Healthcare Workforce Fact Base




## Demand/Supply Assessment

Demand Assessment

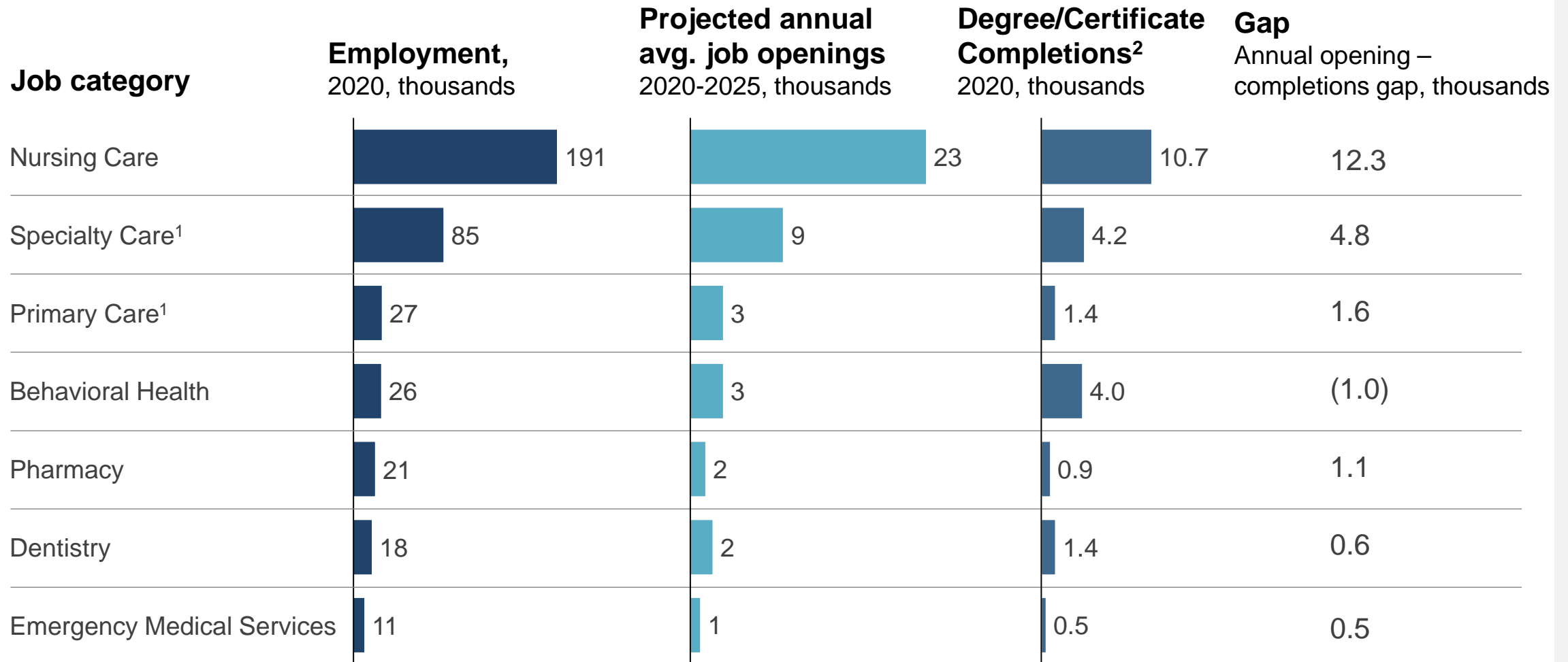
Supply Assessment



**While variations exist by profession, healthcare demand is growing faster than the supply of healthcare practitioners**

- 
- Overall population growth and Georgia's aging population are driving increased demand for healthcare
  - At the same time, there is a shortage of healthcare practitioners in Georgia; the share of unfilled roles has nearly doubled since 2020
  - The supply of workers does not meet today's demand, and sources of new talent are not filling the growing gap

# The demand supply gap may grow in most categories as degree completions are lower than forecasted job openings



1. Medical assistants are included both in primary care and specialty care. Jobs, openings and completions were distributed based on the relative workforce size of both groups (33% in primary care, 67% in specialty care)
2. To adjust for duplication, the number of completions within each instructional program (CIP) was distributed to each corresponding occupation (SOC) by way of a weighted average based on current employment within occupations. Completions were distributed taking into consideration typical entry level education requirements for each occupation. Graduates from doctor's degree in medicine (mapped to psychiatrists, as well as physicians in primary care and specialty care) are counted in the behavioral health, primary care and specialty care categories



# Georgia needs roughly 680 practitioners to remove Health Professional Shortage Area designations

Peer states	Total primary care HPSA <sup>1</sup> designations <sup>2</sup>	Population of designated HPSAs (M)	Practitioners needed to remove HPSA designation <sup>3</sup>
Virginia	124	2.0	205
Louisiana	160	2.4	256
Tennessee	<b>133</b>	2.4	259
Colorado	120	1.1	260
North Carolina	213	2.8	416
Michigan	269	2.9	482
Illinois	263	3.3	534
Washington	203	3.0	626
Arizona	236	3.2	653
<b>Georgia</b>	<b>243</b>	<b>3.2</b>	<b>673</b>
Texas	424	7.3	969
Florida	276	6.3	1,505

1. Health professional shortage areas

2. Area must have a population-to-provider ratio of at least 3,500-to-1 to be considered as having a shortage of primary medical care providers

3. Number of additional primary care physicians needed to achieve a population-to-primary care physician ratio of 3,500 to 1 in all designated primary care HPSAs, resulting in their removal from designation

“ For physicians, we need to **make the State more attractive for those who want to come**, but also for those who want to go to less populated areas  
- Commission Member Quote ”

# Across Primary Care and Allied Primary Care, current completions are not enough to close the gap



There were **292 new primary care physician openings** in 2020. Of the **568 GA physician graduates**, historic trends would suggest that roughly **200** become primary care physicians, and some of those may leave the state<sup>1,2</sup>



**Non-physician primary care completions (i.e., NP, PA, Allied Primary Care) fill less than 50% of the open positions.** For example, there were 1,020 new openings for NPs but only 339 completions in 2020



The challenge extends to the **allied professions** where there **were 4,193 medical assistant openings and less than 900 completions in 2020**

“

“... physicians cannot get their work done without the support of the other staff involved in patient care”

“...Primary Care physicians that are well-educated [are the most challenging to recruit for]”

“[As] shown in multiple studies, a good core of primary care will be great for the overall health of the area as well as most cost effective”

”

- Commission Member Quotes

# Both quantitative and qualitative evidence suggest imbalances within the nursing category



**There were 2,065 new openings for LVNs and 358 completions in 2020.** This talent gap would grow over time if openings continue to outpace supply



In a recent survey of nurses providing direct patient care, **29% indicated that they are likely to leave their current direct patient care position** in the next year, up from 22% a year ago<sup>1</sup>



Commission members' interviews suggest that most attention is needed in the **Nursing segment where the perceived imbalance is most severe and consequential**

“

Nurses [are] the role of healthcare that provides the highest amount of direct care/interface with the patient

While there are shortages everywhere, bedside nurses are by far the most critical

Nurses are leaving the profession in large numbers and there are many challenges to training new nurses

”

- Commission Member Quotes

# Healthcare Workforce Fact Base



Demand/Supply Assessment

**Demand Assessment**

Supply Assessment

# Demand for healthcare services is growing and reflected in the demand for healthcare workers

1

Overall population growth and Georgia's aging population are driving increased demand for healthcare

2

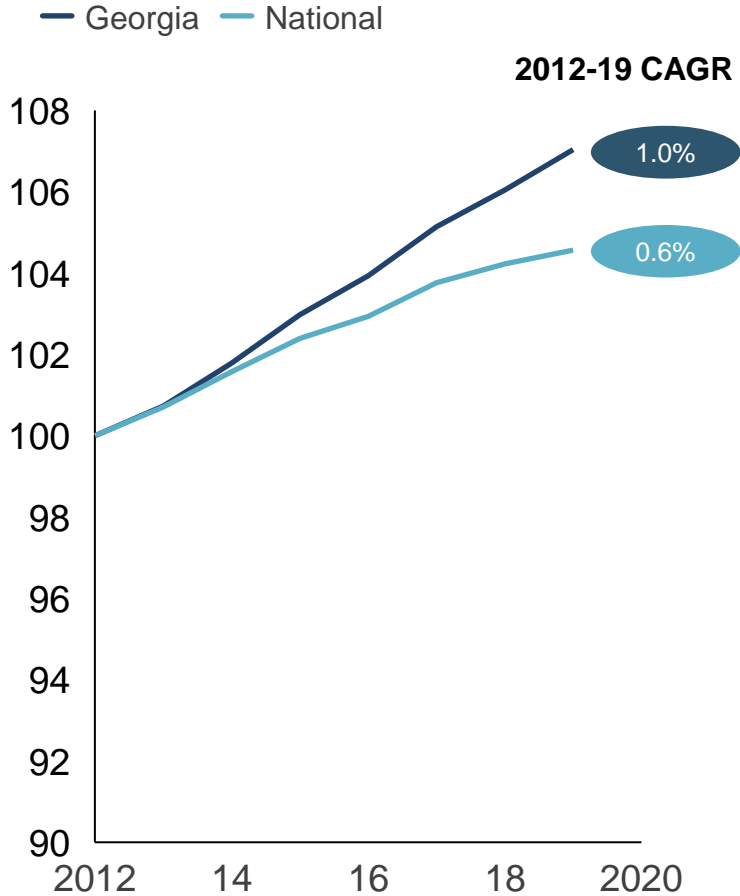
Diseases with significant existing care burden are expected to rise and further increase healthcare utilization

3

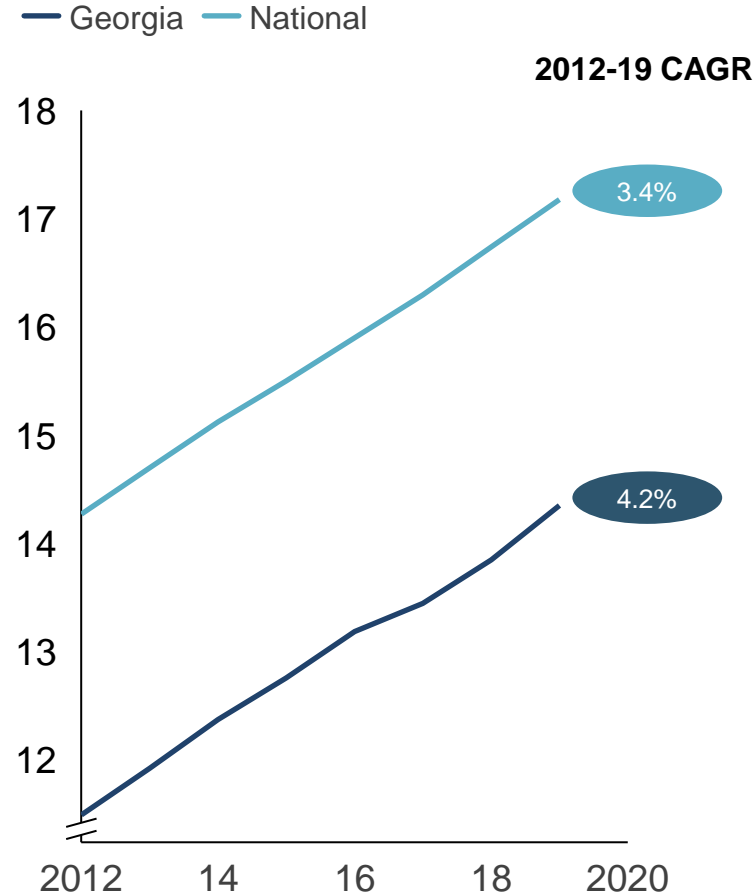
Job postings have been increasing over the last two years – indicating increased demand for healthcare workers

# Growth of overall population, and more specifically of those over 65, is higher in Georgia, likely driving demand for healthcare

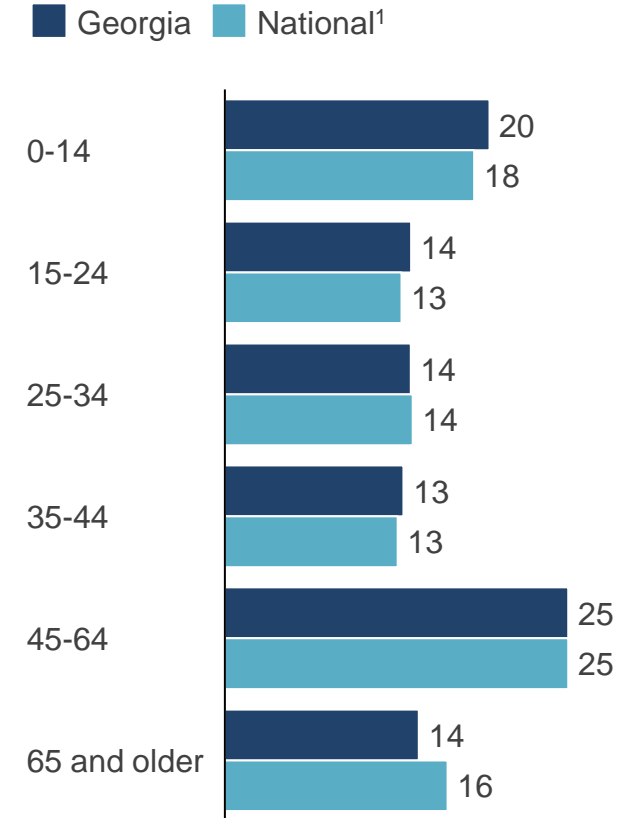
**Total population growth in Georgia and United States, Index: 2012=100**



**Population age 65+ in Georgia and United States, Percent, 2012-2019**



**Population by age group Percent, 2019**

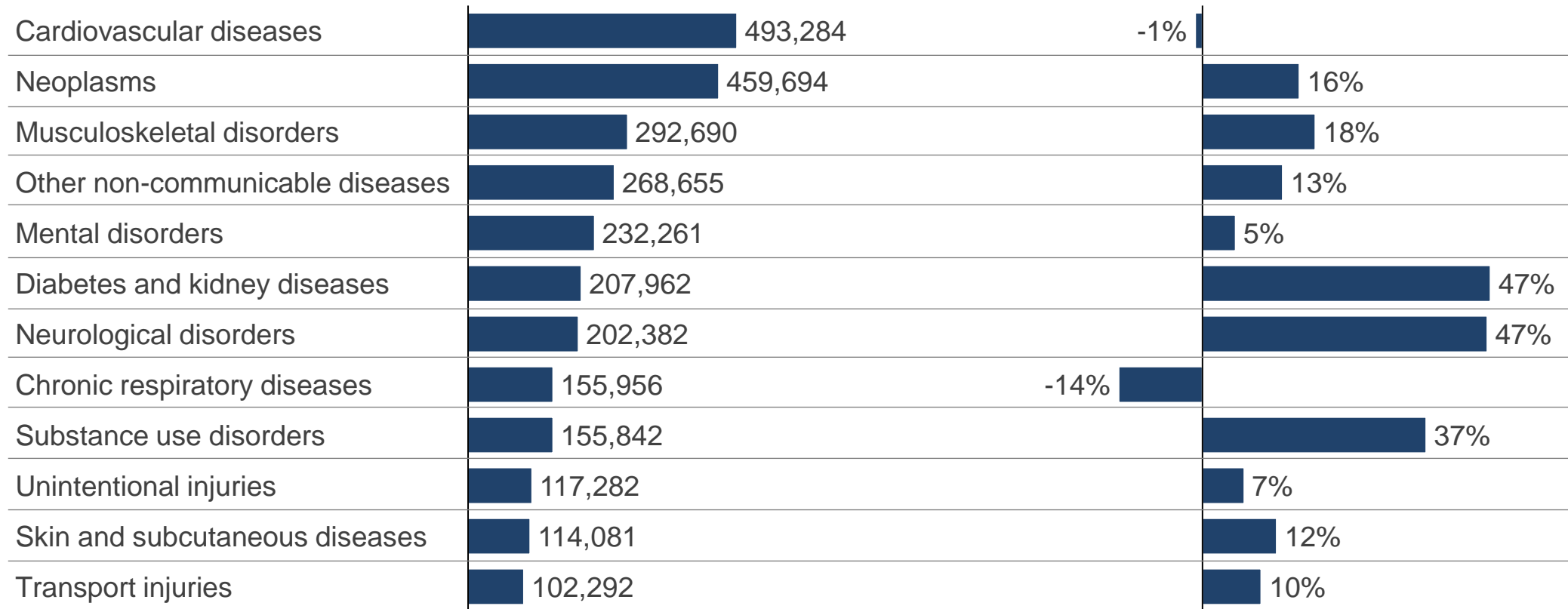


Source: U.S Census Bureau, American Community Survey

# Except for cardiovascular and respiratory diseases, most other diseases with significant care resource burdens are expected to rise and further increase demand

**Top diseases by diseases burden in Georgia**  
2020, DALYs<sup>1</sup>

**Change in disease burden between 2020 and 2040 in Georgia, % change in disease burden measured in DALY<sup>1</sup>**



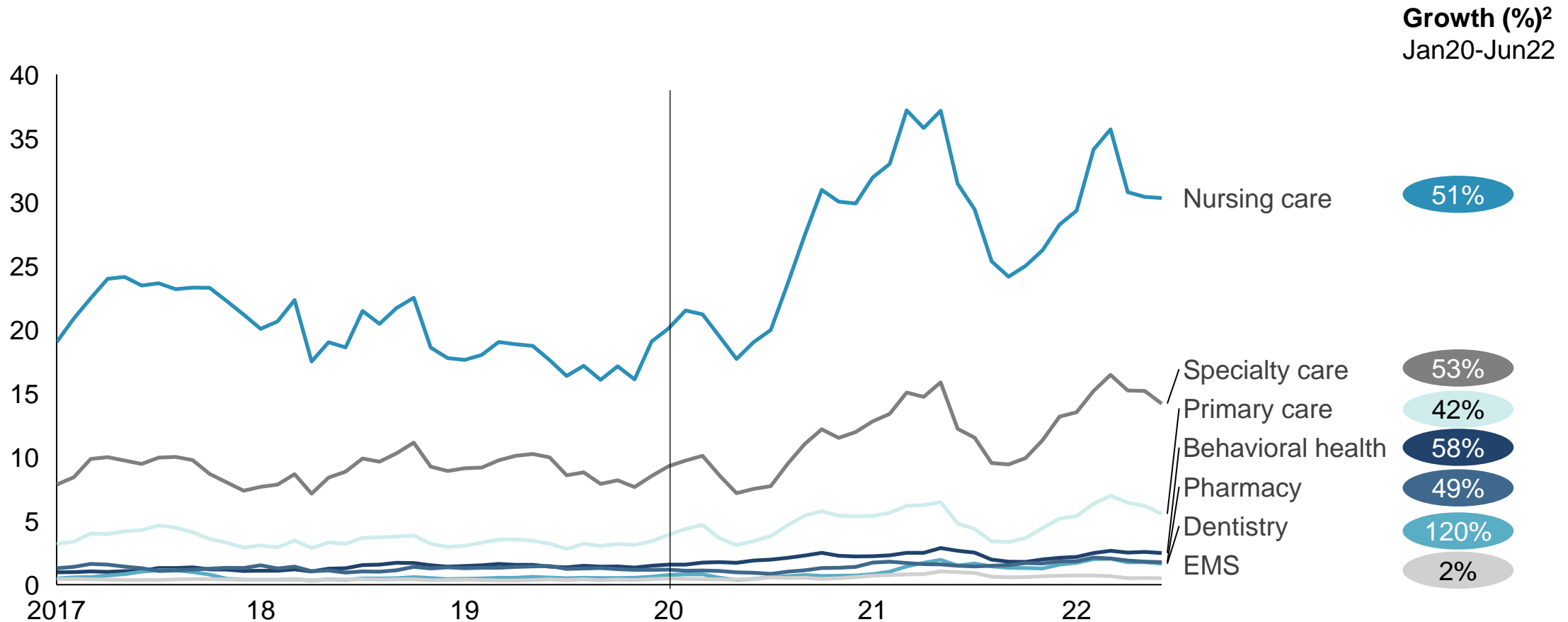
1. DALY = Disability-adjusted life year | 2. STI = sexually transmitted infections. TB = tuberculosis. NCD = non-communicable disease. NTD = neglected tropical disease.

Source: Global Disease Burden Database Institute for Health Metrics and Evaluation (IHME), University of Georgia (this view excludes "Other non-communicable diseases"), MGI Analysis

# Job postings for healthcare roles in Georgia have increased over the last five years, though a 2021 dip may reflect COVID challenges

## Healthcare unique job postings in Georgia by category

Thousands, January 2017-May 2022



1. Job postings for nursing assistants are included both in the primary care and specialty care categories
2. Growth rate for the remaining job categories are: dentistry (120%), pharmacy (49%), emergency medical services (2%)

Source: Lightcast™ (formerly EMSI-Burning Glass)



# Demand growth is expected to continue for healthcare occupations *(page 1 of 2)*

Top 3 healthcare occupations for each category with largest projected demand by category in Georgia

Category	Occupation title	Average Annual Openings 2020 – 2025	Forecasted job growth 2020 – 2025, %
Nursing Care	Home Health and Personal Care Aides	10,099	16.3%
	Registered Nurses	5,200	6.3%
	Nursing Assistants	4,575	1.5%
Primary Care	Medical Assistants	4,198	16.6%
	Nurse Practitioners	1,025	32.8%
	Physician Assistants	536	21.1%
Specialty Care	Medical Assistants	4,198	16.6%
	Clinical Laboratory Technologists and Technicians	1,079	8.3%
	Massage Therapists	587	32.8%

“ We need more Primary Care community-based physicians and fewer specialists  
- Commission Member Quote ”

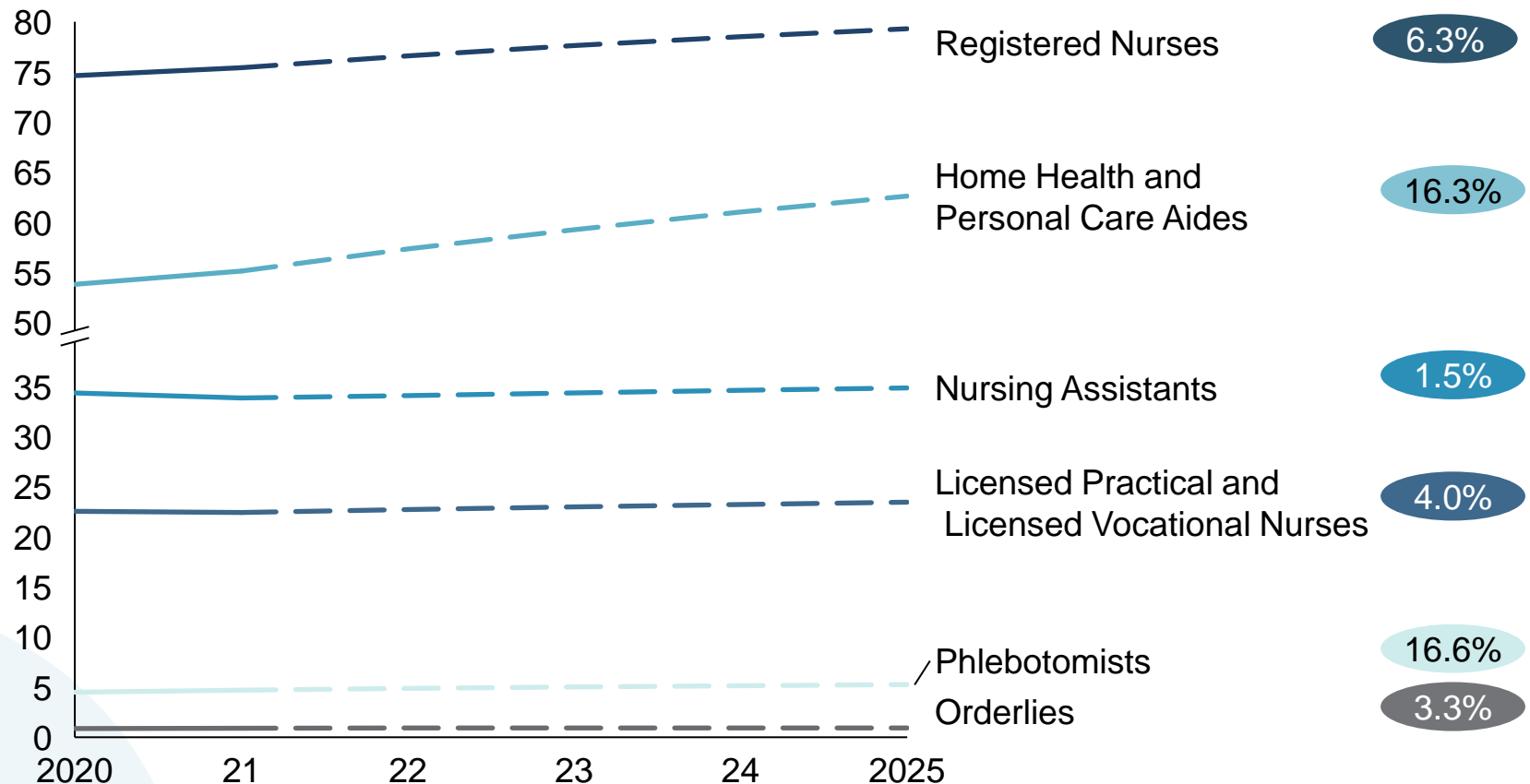
# Demand growth is expected to continue for healthcare occupations *(page 2 of 2)*

## Top 3 healthcare occupations for each category with largest projected demand in Georgia

Category	Occupation title	Average Annual Openings 2020 – 2025	Forecasted job growth 2020 – 2025, %
Behavioral Health	Substance Abuse, Behavioral Disorder, and Mental Health Counselors	828	20.2%
	Child, Family, and School Social Workers	713	5.8%
	Healthcare Social Workers	427	8.8%
Dentistry	Dental Assistants	1,414	16.4%
	Dental Hygienists	611	15.7%
	Dentists, General	186	15.8%
EMS	Emergency Medical Technicians and Paramedics	981	6.6%
Pharmacy	Pharmacy Technicians	996	5.1%
	Pharmacists	431	1.9%
	Pharmacy Aides	97	-3.2%

# Within nursing and allied nursing care, all job roles may continue to see high job growth

**Nursing jobs in Georgia by occupation**  
2020-2025, thousands



## Key factors influencing nursing demand

- Share of Care Responsibility:** Nurses could see increased utilization and care responsibility as physicians and surgeons may not fully meet the growing demand for healthcare services. That demand is further passed through to nursing partners
- Non-care Activities:** Growth of nonclinical nursing careers (e.g., hospital administrators, health policymakers, and bioinformatic analysts) can take nursing labor out of nursing roles

# Healthcare Workforce Fact Base



Demand/Supply Assessment

Demand Assessment

**Supply Assessment**

# Supply is constrained and not matching demand growth

1

Graduation pipeline is stable but not mirroring multiple professions' demand growth, hence insufficient to fill openings from new growth plus retirements

2

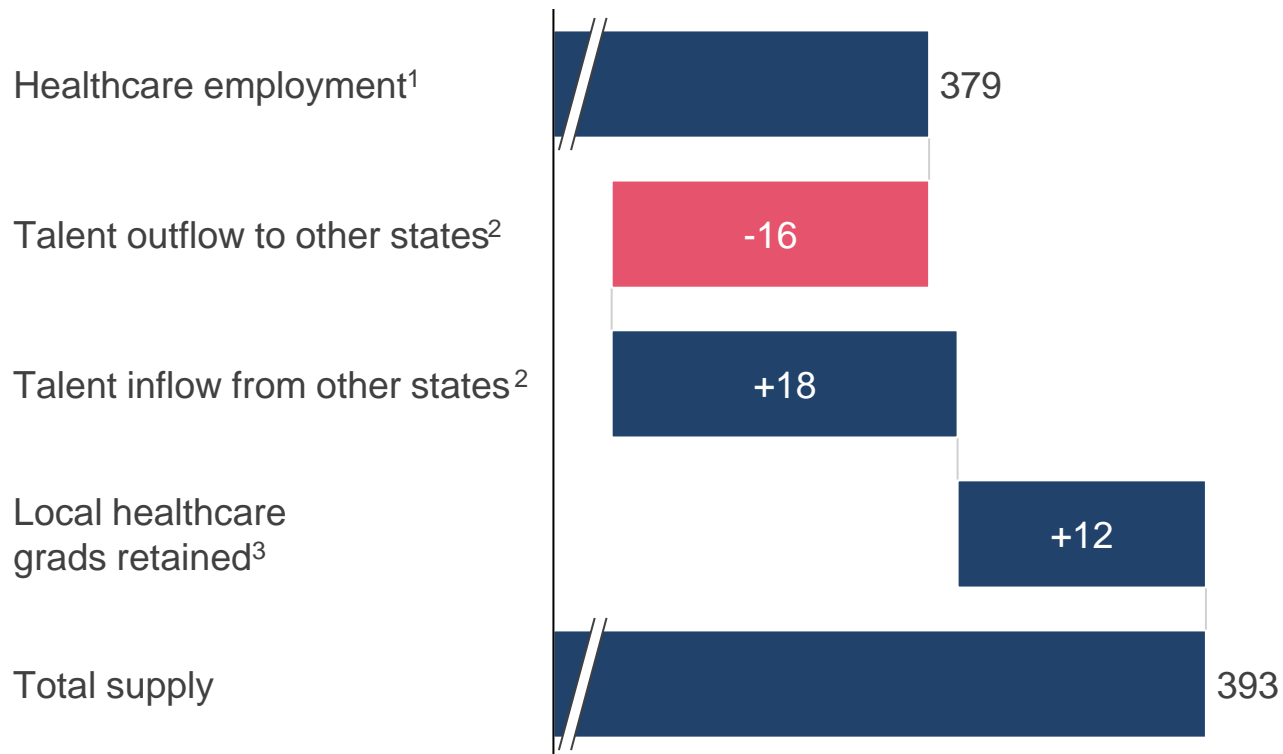
A diverse group of private and public educators support the training of the workforce with nearly 50% of healthcare graduates coming from the top 20 institutions

3

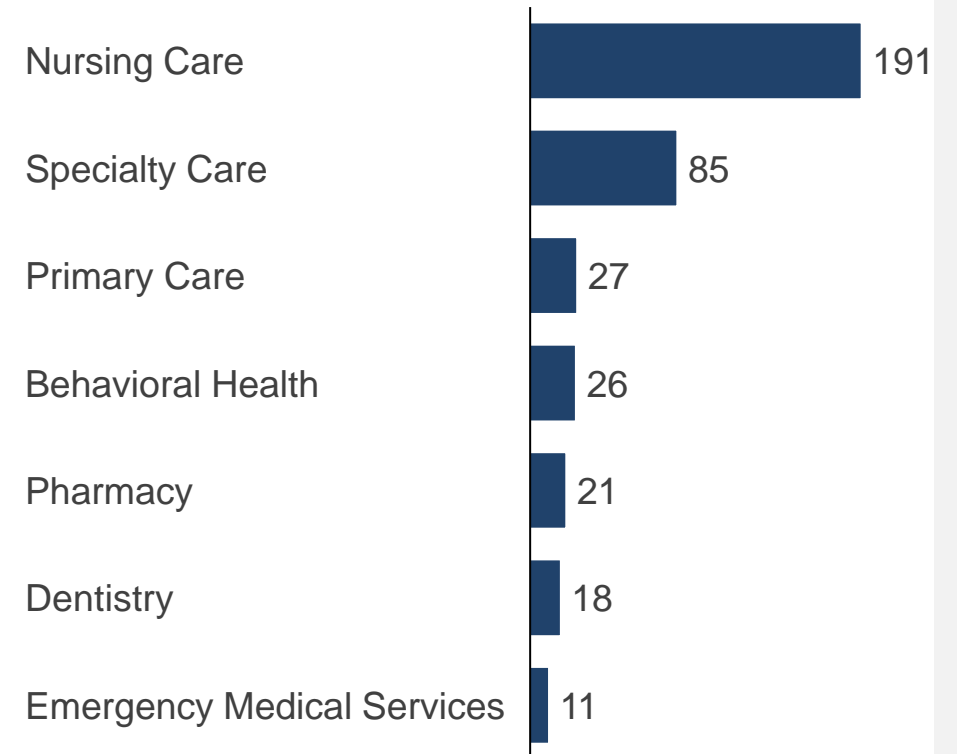
Beyond seats, qualitative findings suggest the future workforce is further constrained by other factors, such as staff availability, cost, and access

# The healthcare workforce in Georgia includes ~380K workers with a net addition of nearly 14,000 workers annually

**Supply pipeline of healthcare workers in Georgia,**  
2020, thousands



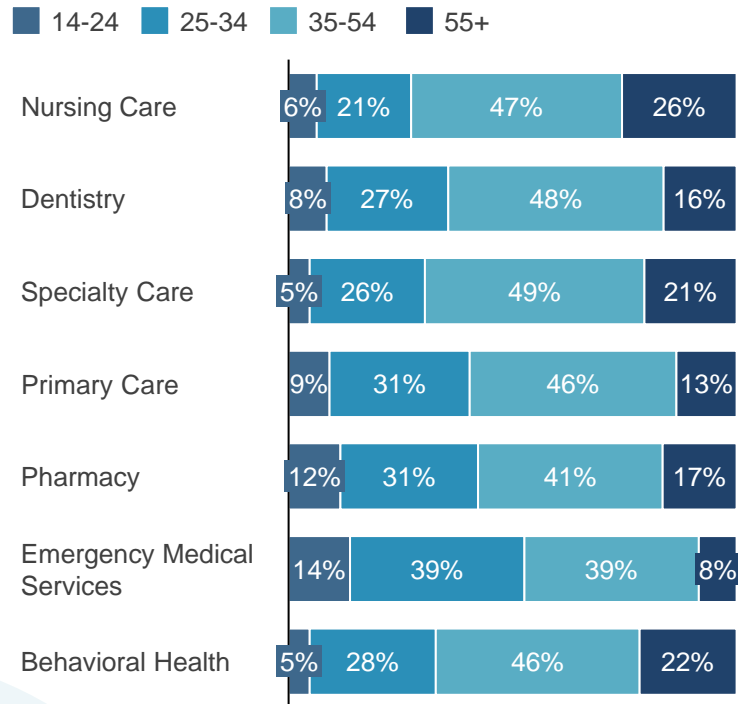
**Employment,**  
2020, thousands



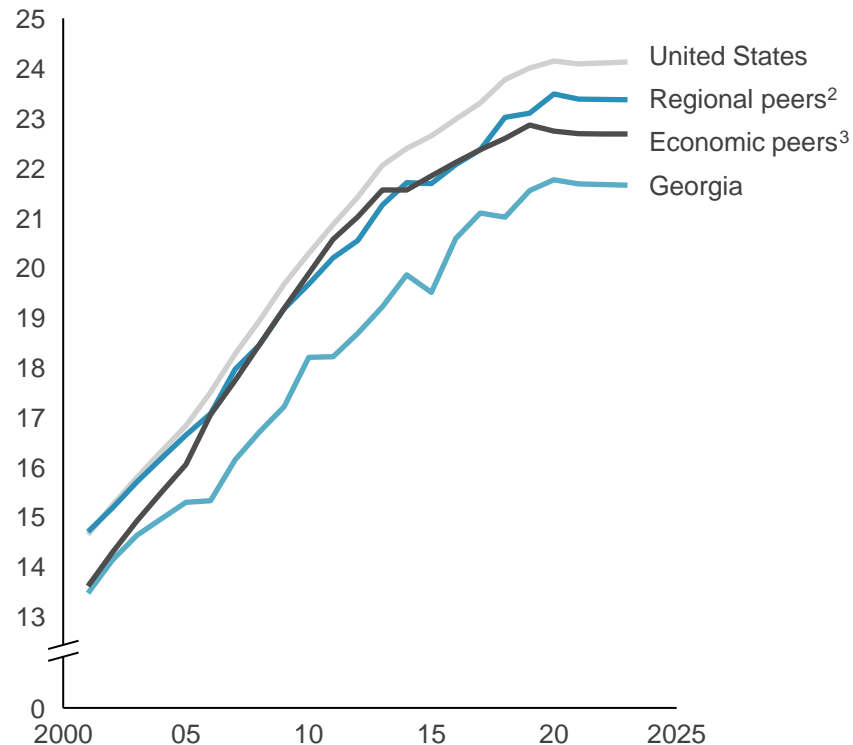
1. Total employment in Georgia for 60 occupations across healthcare practitioners and technical (29-0000), healthcare support (31-0000), community and social service (21-0000) and life, physical and social science (19-0000)
2. Net flow of healthcare and social assistant hires in Georgia (Hires into GA from out of state less hires out of GA to out-of-state). Annual average of 2017-2020 estimates from the U.S. Census, Job-to-Job Flows, 2017 Q1 – 2020 Q4
3. 2020 completions in related programs to healthcare occupations. Instructional programs were mapped to occupations based on a crosswalk of SOC-CIP. Retention rate was estimated as the share of grads who remain in-region after completing their degree; based on profiles (LinkedIn, Career Builder, etc.) updated since 2018 for graduates of higher ed institutions

# Roughly 20 percent of healthcare workers are over 55 and are likely to retire

Healthcare employment<sup>1</sup> by age by category in Georgia, % of total employment, 2021



Share of aging healthcare workforce<sup>1</sup> by geography (ages 55+), % of total employment, 2001-2023



“ [Over the past 3 years,] nursing witnessed a Great Resignation and a Great Retirement - Commission Member Quote ”

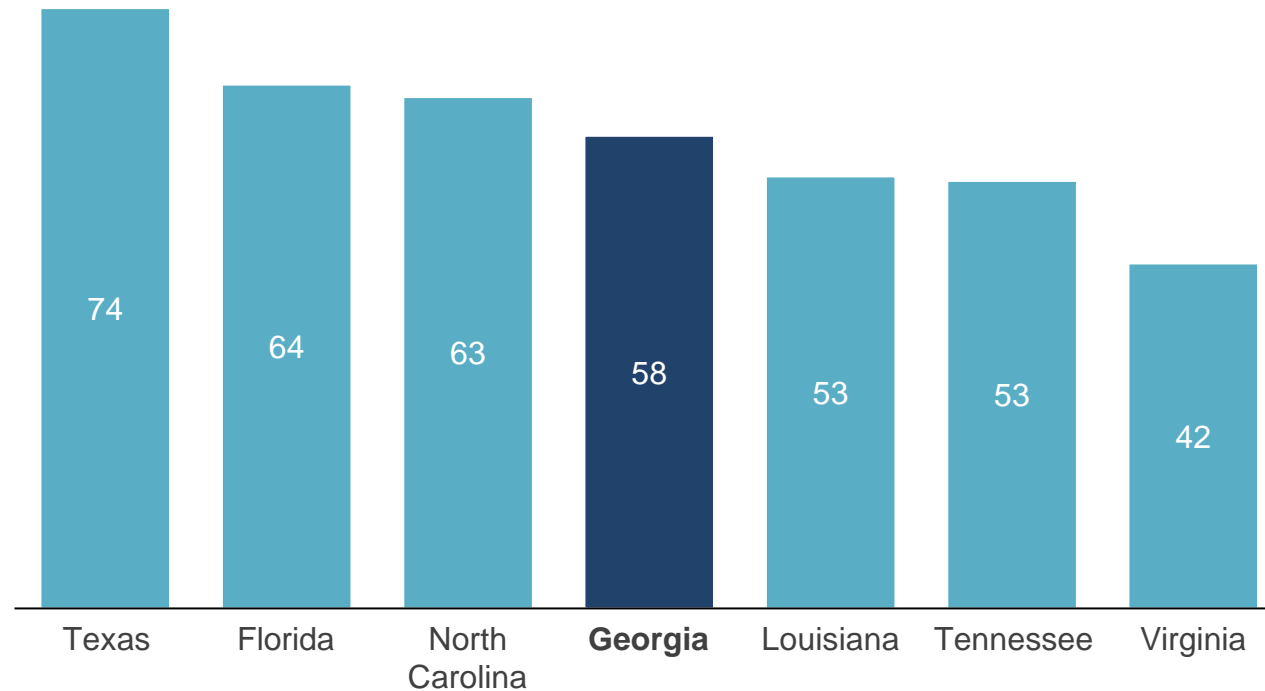
In a recent survey of nurses providing direct patient care, **29% indicated that they are likely to leave their current direct patient care position in the next year, up from 22% a year ago.**<sup>4</sup>

1. Includes 60 occupations across healthcare practitioners and technical (29-0000), healthcare support (31-0000), community and social service (21-0000) and life, physical and social science (19-0000)  
 2. Virginia, North Carolina, South Carolina, Tennessee, Florida, Louisiana, Texas, Missouri, Alabama  
 3. Michigan, Colorado, Arizona, Ohio  
 4. 2022 NSI National Health Care Retention & RN Staffing Report  
 Source: Lightcast™ (formerly EMSI-Burning Glass)

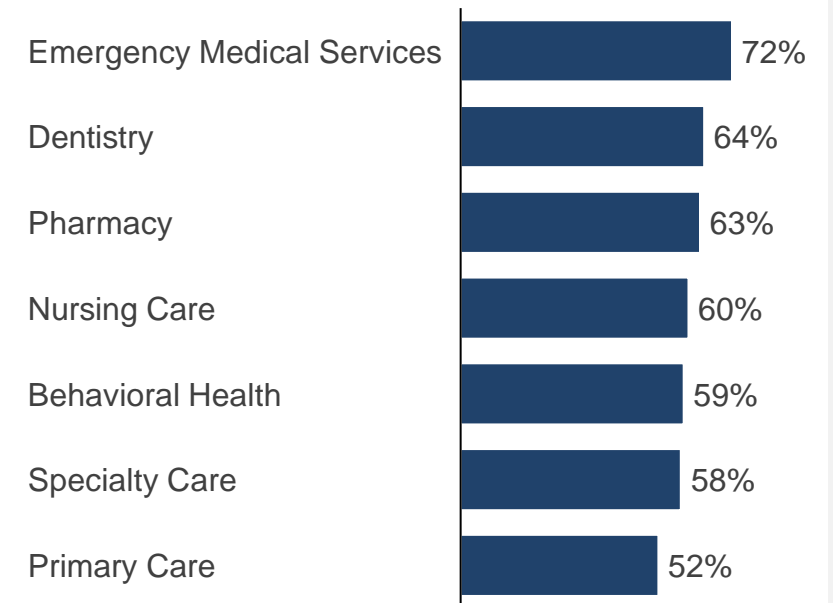
# Georgia retains 58% of graduates, about average compared to regional peers; however, there is an opportunity to improve retention rates across all labor categories

Estimated in-state talent retention after graduation for healthcare occupations<sup>1</sup> based on online profiles<sup>2</sup>, %

State, all healthcare job categories



Job category, Georgia



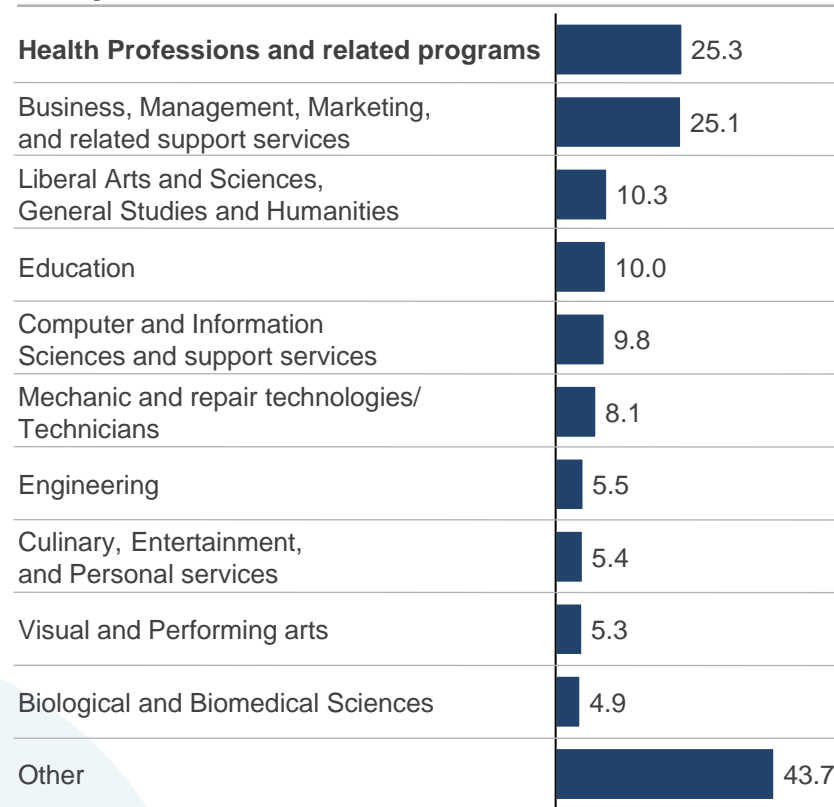
1. Includes 60 occupations across healthcare practitioners and technical (29-0000), healthcare support (31-0000), community and social service (21-0000) and life, physical and social science (19-0000)

2. Share of grads who remain in-region after completing their degree; based on profiles (LinkedIn, Career Builder, etc.) updated since 2018 for graduates of higher ed institutions

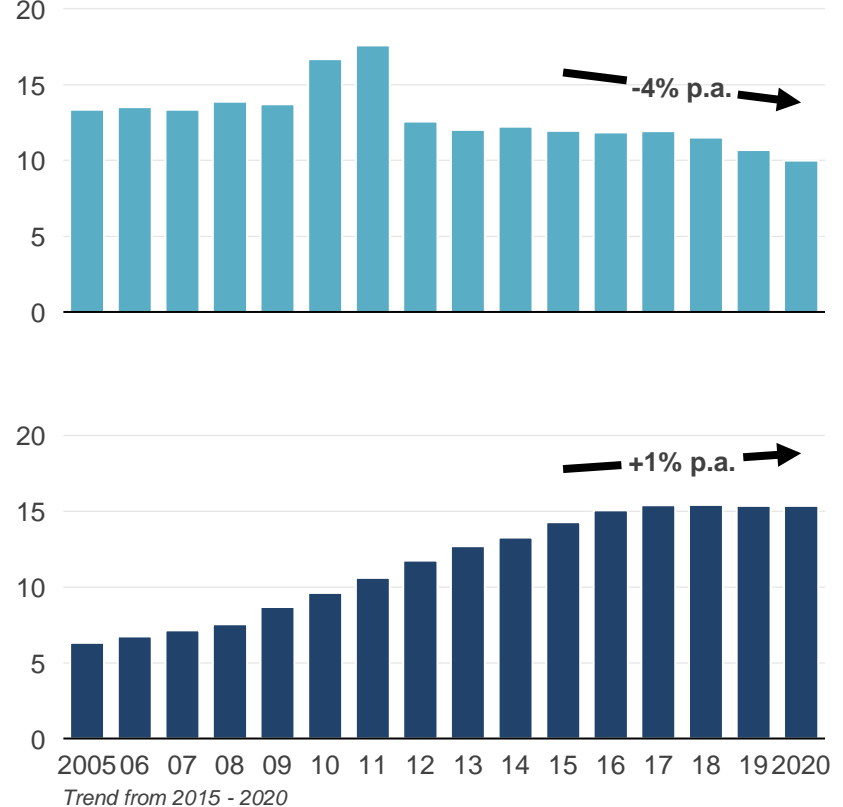


# Health professions are the top field of study, with stable number of degrees and declining number of certificates awarded

Top fields of study in Georgia by number of completions<sup>1</sup>, thousands, 2020



Healthcare completion trends, thousands



“ It's not as difficult to recruit students and faculty in Medicine and Dentistry, but it is very difficult in other areas of medicine  
- Commission Member Quote ”

“ [We have trouble recruiting for] Nursing faculty - DNP and PhD prepared  
- Commission Member Quote ”

1. Includes both degree and certificate completions for all institutions in Georgia. Healthcare was defined as: health professions and related programs (CIP 51)

# Twenty institutions educate nearly half of all healthcare graduates in Georgia

Private Public ■ Certificates ■ Associate's ■ Bachelor's ■ Master's ■ Doctor's

Healthcare program completions<sup>1</sup> from 20 largest institutions in Georgia by award level #, 2020 Share of healthcare completions in GA

Institution	Total Completions	Share of completions in GA
Emory University	1,212	5.7%
Augusta University	1,004	4.5%
Georgia Southern University	826	3.7%
Mercer University	772	3.0%
Central Georgia Technical College	730	2.8%
Chattahoochee Technical College	719	2.7%
Georgia State University	692	2.6%
Gwinnett Technical College	686	2.5%
University of Georgia	619	2.5%
Southern Crescent Technical College	599	2.3%
West Georgia Technical College	594	2.2%
Coastal Pines Technical College	575	2.2%
Wiregrass Georgia Technical College	574	2.1%
South University—Savannah <sup>2</sup>	561	2.1%
Georgia Northwestern Technical College	560	2.1%
Savannah Technical College	528	1.9%
Southern Regional Technical College	494	1.8%
Ogeechee Technical College	492	1.8%
Lanier Technical College	475	1.7%
Atlanta Technical College	448	1.6%

1. Includes all degree and certificate completions for health professions and related programs (CIP 51)

2. Includes: South University- Savannah (139579) and South University- Savannah Online (475121). Completions for this institution were adjusted to only include on-ground completions as well as online completions from in-market students. According to Gray Associates, there were a total of 1858 completions in 2020. On-ground completions accounted for 301 grads. Online programs accounted for 1557 completions (17% from in-market students, for a total of 260 completions)

Source: Lightcast™ (formerly EMSI-Burning Glass), National Center for Education Statistics- IPEDS dataset, Gray Associates

“ Private colleges have had a strong positive impact [on the] nursing pipeline due to the ability to support the students and increase the acceptance of non-traditional students ”  
- Commission Member Quote

# Commission Members highlight the important role educational institutions play in the healthcare workforce supply and suggest ways to improve the status quo

Survey responses from HWC Members

## Access:

“ Ensuring **equitable access to financial support** for students in both private and public institutions ”

“ **Early programs starting in grade school** to introduce and connect healthcare interested students [are important in addressing the shortage] ”

“ [We should] examine **increasing full-time academic salaries** for nursing faculty in USG system institutions; stipends for RNs to attend USG institution programs for DNP or PhD degrees to **increase pipeline of faculty and thereby increase student enrollment** in our publicly funded schools and colleges of nursing ”


## Capacity and Cost:

“ We need more **medical school and nursing school spots**. We make it **too difficult to get in** ”

“ We have to **do more to reduce this cost**. Students are leaving school with \$200,000 + of debt (more if they have debt from college) ”

## Certification Levels:

“ We have to look at the requirement for **having all nursing aides certified**. I am hopeful that our recently formed [initiative] can help **bring more high school graduates into these critical positions** ”



## Recap and open discussion



- There is a shortage of healthcare workers in Georgia – across all professions
- These are particularly acute in Nursing and Primary Care
- The labor shortage may get worse over time due to aging & increasing incidence of disease



Data suggests areas of potential inquiry for opportunities include:

- Increase existing workforce through attraction and retention
- Build and train new workforce through education, licensure, and up/reskilling
- Increase effectiveness of new workforce through evolving care models



We welcome questions from the Commissioners

...

# Next steps

**01**

## **Host Open-Forum #1**

Query the community and select experts for insight on solutions

---

**02**

## **Prepare for Commission Meeting #2**

Begin consideration of statewide solutions and identify case-studies of peer actions

---