



WORKFORCE
SOLUTIONS Capital Area

Connecting People to Jobs

Workforce Solutions

Capital Area Healthcare Industry Analysis

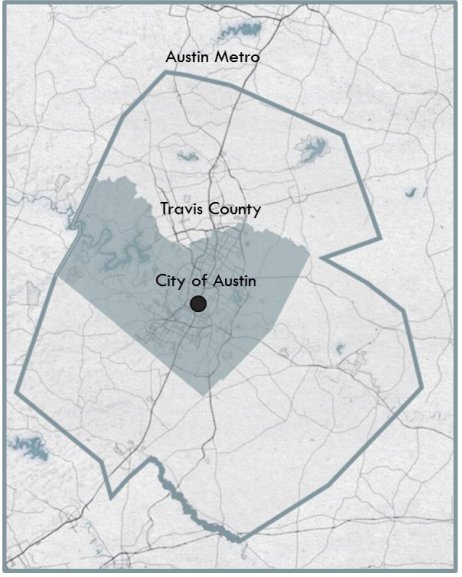
REPORT 1: WORKFORCE SUPPLY & DEMAND ANALYSIS
EXECUTIVE SUMMARY

JUNE 2018



Travis County lies at the heart of one of the country’s best performing economies. During the past five years, employment in Travis County and the broader Austin region has increased at twice the national rate of growth. Since 2012, employers in the Austin region have added nearly 170,000 jobs, more than 70% of which have been located within Travis County. During this period, the Healthcare industry grew by 16,000 workers and was one of the largest job creators in the region.

Given the expected strong demand for Healthcare workers, especially among middle-skill jobs, it is crucial that the region possess a pipeline capable of producing the talent necessary for growth. The Workforce Solutions Capital Area Workforce Board has collaborated with several regional healthcare workforce development stakeholders to launch a new workforce initiative known as the Central Texas Healthcare Partnership. In support of this effort and with funding from the Texas Workforce Commission’s Texas Industry Partnership program, the Board commissioned the following Healthcare Industry Analysis to better understand the supply and demand dynamics related to high-demand, middle-skill healthcare careers.



Although Travis County is the ultimate focus of the following analysis, the community’s labor force extends beyond its borders. According to the US Census Bureau, for example, approximately 45% of all workers in Travis County live elsewhere. College students display a similar level of geographic fluidity, with many graduates from schools outside of Travis County eventually becoming part of the local workforce. To ensure that the analysis reflects this reality, the Healthcare Industry Analysis is conducted for the entire Austin metropolitan area.

The Board commissioned the **Healthcare Industry Analysis** to better understand the labor market landscape and discover potential strategies to increase alignment between regional supply and demand for middle-skill healthcare careers. Early convenings of the Central Texas Healthcare Partnership found that middle-skill healthcare occupations are of particular concern in the region. **Report 1** provides quantitative validation of those findings by determining the makeup of the region’s labor force and identifying the occupations that are thriving and those that are undersupplied.



WORKFORCE SUPPLY- DEMAND GAPS: VOLUME

Regional talent ecosystems thrive when local skills production is aligned with the labor demand. The Workforce Supply and Demand Analysis examines the current ability of local post-secondary institutions within the Austin metro Region to meet the needs of local employers. In this analysis we identify occupations expected to fuel local employment gains in the years ahead as well as the number of locally-awarded post-secondary degrees in aligned fields and identify occupations with potential future shortages—or at least those where the supply of local graduates is insufficient to meet projected demand.

This analysis views the gaps between available workforce through two dimensions: **Volume** and **Supply Ratio**.

- **Volume** measures the number of job openings minus the number of graduates from local training programs. The largest volume gaps in the region are **Nursing Aides, Registered Nurses, and LPN/LVNs**.

GAPS BETWEEN SUPPLY AND DEMAND
MIDDLE-SKILL HEALTHCARE OCCUPATIONS*

Largest Gaps	<ul style="list-style-type: none"> • Nursing Aide, Orderlies & Attendants • Registered Nurses
Moderate Gaps	<ul style="list-style-type: none"> • LPN/LVN • Medical Assistants • Dental Assistants • Pharmacy Technicians/Aides • Dental Hygienists • Ophthalmic Medical Technicians • Medical Records & Health Information Technicians • Phlebotomists
Smallest Gaps	<ul style="list-style-type: none"> • Physical Therapist Assistants • Surgical Technologists • Radiologic/Nuclear Technologists & Therapists • Medical & Clinical Laboratory Technicians • Cardiovascular Technologists & Technicians** • Occupational Therapy Assistants • Magnetic Resonance Imaging Technologists** • Respiratory Technicians & Therapists
Oversupply	<ul style="list-style-type: none"> • Diagnostic Medical Sonographers

* Occupations for which there was insufficient data not listed

** Small gap, but severely undersupplied

WORKFORCE SUPPLY- DEMAND GAPS: SUPPLY RATIO

- The **Ratio** measures the number of graduates versus the demand for jobs. The most severely undersupplied as a share of demand (less than 20%) are **Ophthalmic Medical Technicians, Dental Hygienists, Cardiovascular Technologists and Technicians, and Magnetic Resonance Imaging Technologists.**

Taking these two measures into consideration allows an understanding of both the occupations with the largest gaps *and* those with the most severe undersupply ratio, without discounting occupations that may be a smaller, but still critical field within healthcare. Below, these two measures are combined. **Bolded** occupations indicate that the gap between supply and demand is at least 50 jobs annually. Within the five ratio groups, occupations are sorted according to the volume gap.

The following pages provide more detailed information on each of the below occupations.

OVER/ UNDERSUPPLY RATIO	SEVERE SHORTAGE	<ul style="list-style-type: none"> Dental Hygienists Ophthalmic Medical Technicians 	<ul style="list-style-type: none"> Cardiovascular Technologists & Technicians Magnetic Resonance Imaging Technologists
	SHORTAGE	<ul style="list-style-type: none"> Nursing Aide, Orderlies & Attendants Registered Nurses Licensed Practical/Vocational Nurses Dental Assistants 	<ul style="list-style-type: none"> Pharmacy Technicians/Aides Phlebotomists Physical Therapist Assistants Occupational Therapy Assistants
	MODERATE SHORTAGE	<ul style="list-style-type: none"> Medical Assistants Medical Records & Health Information Technicians Surgical Technologists 	<ul style="list-style-type: none"> Radiologic/Nuclear Technologists & Therapists Medical & Clinical Laboratory Technicians Respiratory Technicians & Therapists
	SURPLUS	<ul style="list-style-type: none"> Diagnostic Sonographers 	
	UNKNOWN	<ul style="list-style-type: none"> Home Health Aides Psychiatric Aides Emergency Medical Technicians & Paramedics 	<ul style="list-style-type: none"> Psychiatric Technicians Medical Transcriptionists Occupational Therapy Aides

SUPPLY-DEMAND CONDITIONS



Occupation Group	Edu. Level	Annual Job Openings	Completions	Gap #	% of Jobs
Nursing Aide, Orderlies & Attendants	Certificate	1,631	332	1,299	20%
Registered Nurses	Assoc>Bach	1,625	514	1,111	32%
Licensed Practical and Licensed Vocational Nurses	Certificate	534	155	379	29%
Medical Assistants	Certificate	745	475	270	64%
Dental Assistants	Certificate	350	90	260	26%
Pharmacy Technicians/Aides	Certificate	330	81	249	25%
Dental Hygienists	Associate's	190	13	177	7%
Ophthalmic Medical Technicians	Certificate	141	5	136	4%
Medical Records and Health Information Technicians	Certificate	258	142	116	55%
Phlebotomists	Certificate	158	51	107	32%
Physical Therapist Assistants	Associate's	136	49	87	36%
Surgical Technologists	Certificate	98	50	48	51%
Radiologic/Nuclear Technologists & Therapists	Associate's	160	113	47	71%
Medical and Clinical Laboratory Technicians	Associate's	92	47	45	51%
Cardiovascular Technologists and Technicians	Associate's	37	4	33	11%
Occupational Therapy Assistants	Associate's	41	14	27	34%
Magnetic Resonance Imaging Technologists	Associate's	21	3	18	14%
Respiratory Technicians & Therapists	Associate's	72	57	15	79%
Diagnostic Medical Sonographers	Associate's	64	80	-16	126%
Home Health Aides	Certificate	1,113	28	1,085	3%
Psychiatric Aides	Certificate	316	0	316	0%
Emergency Medical Technicians and Paramedics	Certificate	166	23	143	14%
Psychiatric Technicians	Certificate	54	0	54	0%
Medical Transcriptionists	Certificate	38	0	38	0%
Occupational Therapy Aides	Certificate	9	0	9	0%

Severe Shortage

<20%

Shortage

20<50%

Moderate Shortage

50-100%

Surplus

>100%

Unknown

Insufficient Data

Travis County and the broader Austin region are blessed with numerous post-secondary institutions. Each year, these schools produce tens of thousands of graduates. In 2016, universities and colleges in the region produced approximately 4,500 post-secondary Healthcare graduates across all award levels, nearly 2,000 of which were at the Certificate (for-credit) or Associate's level. Still, healthcare graduate levels are far lower than US levels on a per capita basis across all degree levels.

The alignment between demand forecasts and local education and training graduates show one side of a workforce supply-demand analysis. Marrying this analysis with feedback from employer and education and training stakeholders allows us to see a clearer picture of the alignment for middle-skill healthcare occupations in the region. This analysis was able to validate many of the assumptions of the Board and the Partnership's initial work as well as add occupations to the list for additional exploration. Occupations of particular interest include:

- Nursing Assistants
- Nurses
- Dental Hygienists and Assistants
- Licensed Practical and Licensed Vocational Nurses
- Home Health Aides
- Ophthalmic Medical Technicians
- Pharmacy Aides and Technicians
- EMTs/Paramedics

Some strategies to expanding a healthy local workforce pipeline for these target middle skill occupations identified during this analysis include:

- Identifying solutions to education and training capacity issues. For example, career awareness and early intervention in career planning, referring students from at capacity program and/or institutions to those with additional capacity, increasing placement opportunities for clinical and internship programs, particularly for sub-baccalaureate programs.
- Determining career pathways from lower wage middle skill healthcare occupations to more sustainable ones. For example, some employers are working with education and training providers to upskill and increase access to additional credentials for incumbent workers
- Developing partnerships with both secondary and postsecondary education providers to share data on completions, enrollment, capacity.