

PHYSICIAN ASSISTANT in the SAN FRANCISCO BAY REGION



Healthcare is one of the largest employers in California, providing a wide range of well-paying career opportunities for residents. In 2014, the Centers of Excellence partnered with the Health Workforce Initiative (HWI) and the California Hospital Association (CHA) on two healthcare surveys to **assess workforce needs** at both state and regional levels. The surveys targeted three healthcare sectors:

- **Hospitals** provide medical, diagnostic, and treatment services to inpatients and some outpatient services.
- **Ambulatory Healthcare Services** provide healthcare services to outpatients in settings such as offices of physicians, outpatient care centers, and laboratories.
- **Nursing and Residential Care Facilities** provide residential care combined with either nursing, supervisory, or other types of care as needed.

Statewide, 190 hospitals responded to the hospital survey and 1,600 clinics, labs and facilities responded to the ambulatory and residential care survey, providing a sufficient sample to analyze healthcare workforce demand across the state and in several regions. The research focused on identifying: (1) labor market demand for key occupations in healthcare industries, (2) training supply supporting healthcare industries, and (3) key issues impacting supply and demand.

This report is one in a series of reports profiling healthcare occupations in the San Francisco Bay region.¹ There are ten occupational profiles in the series: registered nurses, certified nursing assistants, licensed vocational nurses, medical assistants, medical coders, physician assistants, healthcare social workers, medical laboratory technicians, occupational therapy assistants and home health aides.

Labor Market Demand

In the San Francisco Bay region, there are approximately 1,388 physician assistant (PA) jobs in the **ambulatory and residential care** subsectors. Over a 12 month period (Apr 2014 to Mar 2015), employers in these subsectors will need to fill about 600 openings created by new jobs and replacement needs.

Current and Projected Employment for Physician Assistants²

Ambulatory & residential care industries (n=56)	Current Employment (2014)	12-Month Growth	Replacement Jobs	Total Openings (Growth + Replacements)
	1,388	128	473	601

California Hospital Association members that responded to the survey employ approximately 80 physician assistants. This sample does not include an estimate of total hospital employment because less than half (41%) of CHA regional member hospitals participated in the survey.

Current Employment for Physician Assistants

Hospitals (n=41)	Current Employment*	Full-time Positions	Part-time Positions	Per Diem Jobs
	82	60	22	48

*Ending headcount for the 4th quarter of 2013.

Labor Market Trends

Ambulatory & Residential Care

- Ambulatory and residential care employers project a 9% increase in new PA jobs over a 12 month period.

Hospitals

- 73% of physician assistants employed by hospitals work full-time.

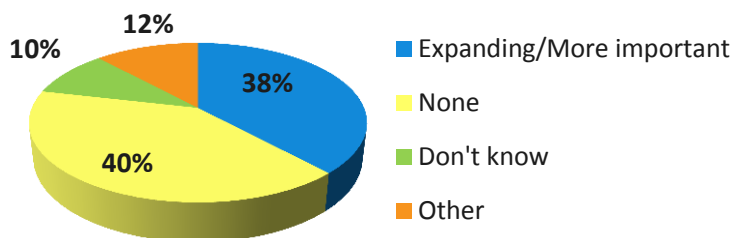
¹The Bay region includes the following 12 counties: Alameda, Contra Costa, Marin, Monterey, Napa, San Benito, Santa Clara, San Francisco, San Mateo, Santa Cruz, Solano, and Sonoma counties.

² Ambulatory and residential care facilities and hospital employment counts include full-time and part-time employment.

Hiring Trends

In the **ambulatory and residential care** survey, employers were asked how they see the Affordable Care Act (ACA) and other trends affecting the work and hiring of PAs. About 40% of employers reported they did not foresee changes in the role of their PAs or in the hiring of PAs as a result of the ACA and other trends. However, 38% of employers responded that the role of PAs will likely be expanding and/or more important in the future. The results are summarized in the chart.

Impact of the ACA and Other Trends on the Role of PAs in Amulatory and Residential Care



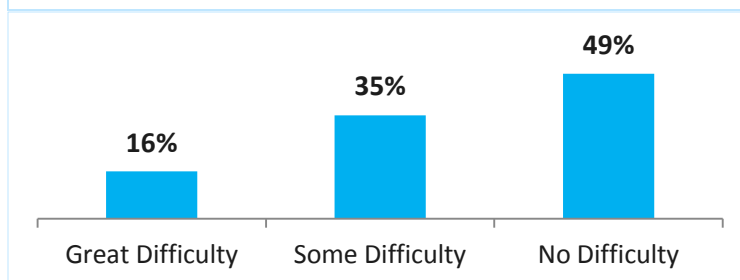
For those employers who did anticipate a change, responses included:

- “PAs will do a majority of patient care except surgery: Pre-ops, Post-ops follow-up visits. This will be the standard of care soon”
- “PAs will be asked to see more patients for less money and work more hours”
- “We suspect that our PAs will be even busier than they already are”
- “Electronic Medical Records (EMR) requires PA has strong computer skills...”

Difficulty Hiring

More than half (51%) of San Francisco Bay region **ambulatory and residential care** employers reported difficulty finding qualified applicants for physician assistant openings.³ Employers generally require a Master’s degree for PA employment in addition to several years of prior work experience in the field.

Bay Region Ambulatory and Residential Care Employer Hiring Difficulty (n=104)



Training Supply

The Accreditation Association for Ambulatory Health Care (AAHC) has mandated that sponsoring schools for PA or Primary Care Associate (PCA) programs must award Master’s degrees to graduating PCA students beginning in 2020. Therefore, the Foothill program is going through the process of “migrating” to Stanford University. However, upon publication of this report, approval had not yet been granted for this transition.

In the region, Foothill College is the only community college that offers physician assistant training or an educational program. Associate degrees were also reported by the College of San Mateo on TOP code 1206.00 Physician Assistant (where Foothill records their PA awards). These awards were granted under San Mateo’s Pre-Nursing transfer program. The other two PA programs in the Bay region are private educational institutions which together awarded 88 Master’s degrees per year on average for 2010-13. A summary of the awards can be found in the table on the following page.

³ Hospital employers were not asked their level of difficulty finding qualified applicants for physician assistant positions.

Degrees or Certificates Conferred 3 Yr Annual Avg (2010-13)	Foothill - Associates	Foothill - Certificates	Private Institutions - Masters ⁴	Total Annual Awards
	9	40	88	137

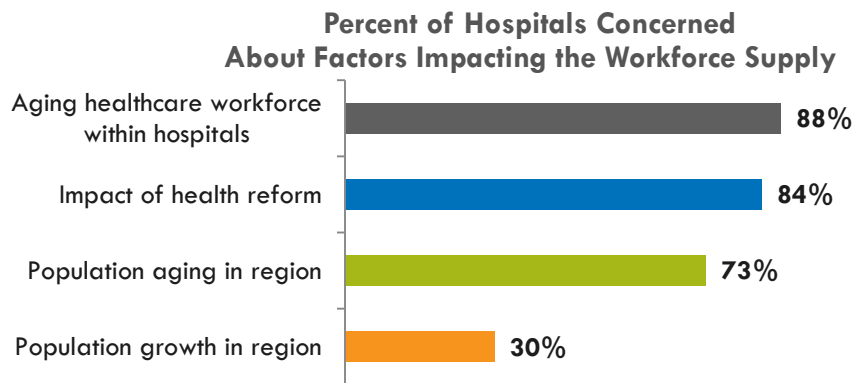
Data Source: Chancellor's Office DataMart and National Center for Education Statistics (NCES)

Physician Assistant Programs:
SF Bay Region
Community Colleges
Foothill College
Private Education Institutions
Samuel Merritt University, Oakland
Touro University California, Vallejo

Supply Challenges

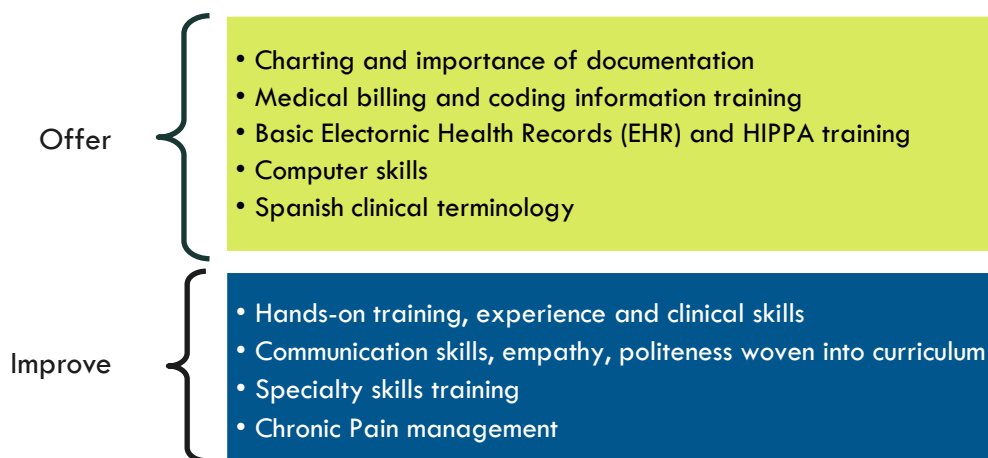
The healthcare sector is facing a variety of factors that may have a direct impact on the workforce supply. Across California, the majority of hospitals are concerned that health reform, the aging hospital workforce, and the aging population will have a significant impact on the state's ability to keep up with healthcare workforce demand.

Healthcare reform is expanding coverage to thousands of previously uninsured residents, which is increasing demand for healthcare services across the board. According to hospitals participating in the survey, the aging population will expand demand for certain types of services, creating additional need for skilled workers.



Employer Perspective

57% of **ambulatory and residential care** employers provide professional development (either in-house or sponsored training) for physician assistants. Some of the training topics include: continuing education training, computer and equipment use, office policies, environments of care and allergic reactions. Ambulatory and residential care employers also provided topics community colleges could offer or improve upon to support professional development for their existing staff. The following suggestions were offered:



⁴ Higher education institutions are required to report completion data to NCES if they participate in any federal financial assistance program authorized by Title IV of the Higher Education Act. Completion data not reported to the NCES or CCCCCO Data Mart were not included in the estimates.

In Summary

The implementation and expanded enrollment in health insurance as a result of the Affordable Care Act may have a significant impact on physician assistants in **ambulatory and residential care** facilities in the San Francisco Bay region. While half of those surveyed did not foresee or know of any changes, approximately 38% of employers indicated an increased demand for qualified applicants and a change in the role of PAs in the workplace. Some of the more salient findings concerning PAs for **ambulatory and residential care** subsectors include:

- Half of the providers in these subsectors reported they are experiencing difficulty in hiring qualified physician assistants.
- There are 600 annual job openings in ambulatory and residential care facilities for PAs in the region.
- Since Master's degrees are being mandated starting in 2020 for PCAs, the future role of community colleges is uncertain.
- A noteworthy number of job openings are a result of replacement jobs (473 jobs), over three and a half times those created due to job growth (128 jobs).

For now, community colleges can provide an introductory education and pathway to this occupation. Employers who responded to the survey had some suggestions on ways community colleges could add or improve upon program offerings. Some responses included: training related to medical billing and coding, EHR, specific areas of healthcare, communication skills and more hands-on experience. By staying connected with local healthcare employers, community colleges can be responsive to their workforce needs.

For More information

This document and others are available to download at www.coecc.net/health. For more information on this study, contact:

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Health Workforce Initiative

More about the Health Workforce Initiative: The HWI provides education and training programs to meet emerging demands for healthcare industry workers; to determine needs, facilitate development of innovative solutions and to locate resources to implement planned responses; to evaluate and initialize health-related educational programs. More information about the Health Workforce Initiative is available at www.ca-hwi.org.



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