



BOARD *of* GOVERNORS

Health Initiatives Committee

Assessing Health Workforce Gaps: A Look at the Process, Physicians, and Physician Assistants

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www.flbog.edu



Health Initiatives Committee Work Plan Update

- Work Plan approved March 2014
 - Environmental Scan (year 1), Strategic and Implementation Plans (years 2 and 3)
- Environmental Scan Question 1
 - Does Florida's current bachelor's and graduate degree production of the health care workforce align with the estimated need (quantity and quality) to the year 2030 given pending changes in population and practice?
- Sub-questions
 - What are the demographic and access factors influencing demand?
 - What are the opportunities and constraints in health education influencing supply?



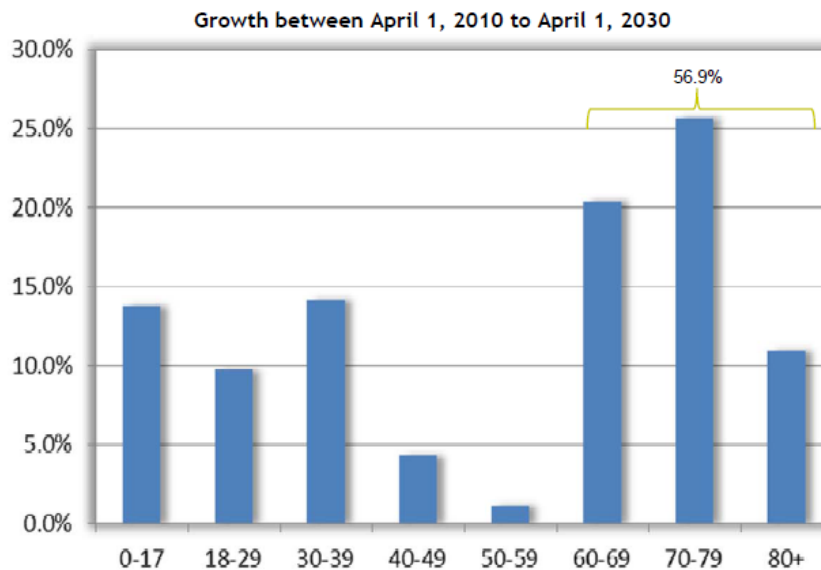
The Supply-Demand Gap Analysis





Demographic Factors

Population Growth by Age Group



Source: The Florida Legislature's Office of Economic and Demographic Research, *Demographic Overview and Population Trends* 11/6/13, accessed online at <http://edr.state.fl.us/> on 7/10/14.



- Between 2010 and 2030, Florida's population is forecast to grow by almost 4.8 million.
- Florida's older population (age 60 and older) will account for most of Florida's population growth, representing 56.9 percent of the gains.
- Florida's younger population (age 0-17) will account for 13.8 percent of the gains.



Access to Care Factors

- Recent insurance exchange figures

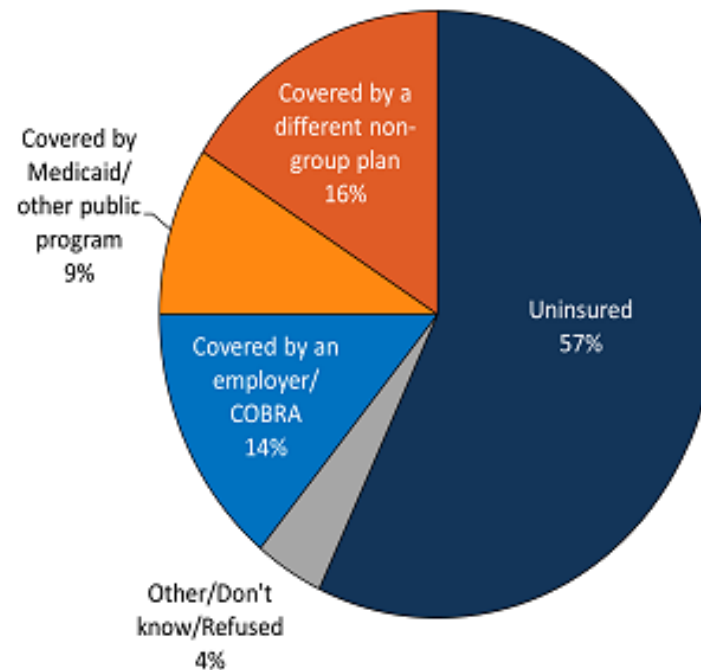
National survey includes prior insurance status and their self-reported health status.

Florida had **983,775** individuals who selected a marketplace plan as of April 2014.

Source: Kaiser Family Foundation, accessed online at <http://kff.org> on 6/23/14.

Nearly Six In Ten In Exchange Plans Were Previously Uninsured

AMONG NON-GROUP ENROLLEES IN PLANS PURCHASED THROUGH A HEALTH INSURANCE EXCHANGE:
Percent who say before purchasing their current plan, they were...



SOURCE: Kaiser Family Foundation Survey of Non-Group Health Insurance Enrollees (conducted April 3 – May 11, 2014)





High Demand Health Occupations

Occupations with the highest total projected openings 2013-2021*,
by rank order:

- 1) Nurses, including instructors
- 2) Physicians (require residency education beyond M.D.)
- 3) Pharmacists
- 4) Physical Therapists
- 5) Medical and Health Services Managers
- 6) Health Teachers, postsecondary
- 7) Dentists
- 8) Medical and Public Health Social Workers, Counselors, and Therapists
- 9) Occupational Therapists
- 10) Speech and Language Pathologists
- 11) Medical Technologists and Scientists
- 12) Environmental Scientists and Specialists, including health
- 13) Physician Assistants
- 14) Dietitians and Nutritionists
- 15) Health Educators

Source: Florida Department of Economic Opportunity

**NOTE: Limited to occupations with 100 or more annual openings and requiring a Bachelor's, Master's, Doctoral, or Professional level degree. Chiropractors and optometrists had 100+ openings but were not included because SUS institutions do not offer these degrees. Veterinarians were also not included in order to limit the list to 15 occupational groups. Some occupations above include multiple SOC codes.*



Assessing Workforce Gaps

Field	SOC (Demand)	CIP (Supply)	Bachelor's Gap*	Graduate or Professional Gap*
Nurses (including instructors)	291141 291171 291151 251072	51.3801 51.3808 51.3818 (18 CIP codes for instructor)	<div>Possible Scenarios for the Fields</div> <p>Those showing gaps between supply and demand</p> <p>Those not showing gaps, but may have gaps once programs and occupations are looked at more closely (migration issues, post-professional issues)</p> <p>Those not showing gaps, or showing an oversupply, even when considering additional supply and demand factors</p>	
Physicians	291069 291062 291063 291067	51.1201		
Pharmacists	291051	51.2001		
Physical Therapists	291123	51.2308		
Dentists	291021	51.0401		
Occupational Therapists	291122	51.2306		
Physician Assistants	291071	51.0912		

*Gaps indicate fields in which Florida experiences at least 100 annual unfilled openings.



Documented National Shortage of Physicians

The AAMC projects a shortage of 45,000 primary care physicians and 46,000 surgeons and medical specialists by 2020.

Projected Supply and Demand, Full-time Equivalent Physicians Active in Patient Care Post Health Care Reform, 2008-2025

Year	Physician Supply (All Specialties)	Physician Demand (All Specialties)	Physician Shortage (All Specialties*)	Physician Shortage (Non-Primary Care Specialties)
2008	699,100	706,500	7,400	None
2010	709,700	723,400	13,700	4,700
2015	735,600	798,500	62,900	33,100
2020	759,800	851,300	91,500	46,100
2025	785,400	916,000	130,600	64,800

Source: AAMC Center for Workforce Studies, June 2010 Analysis

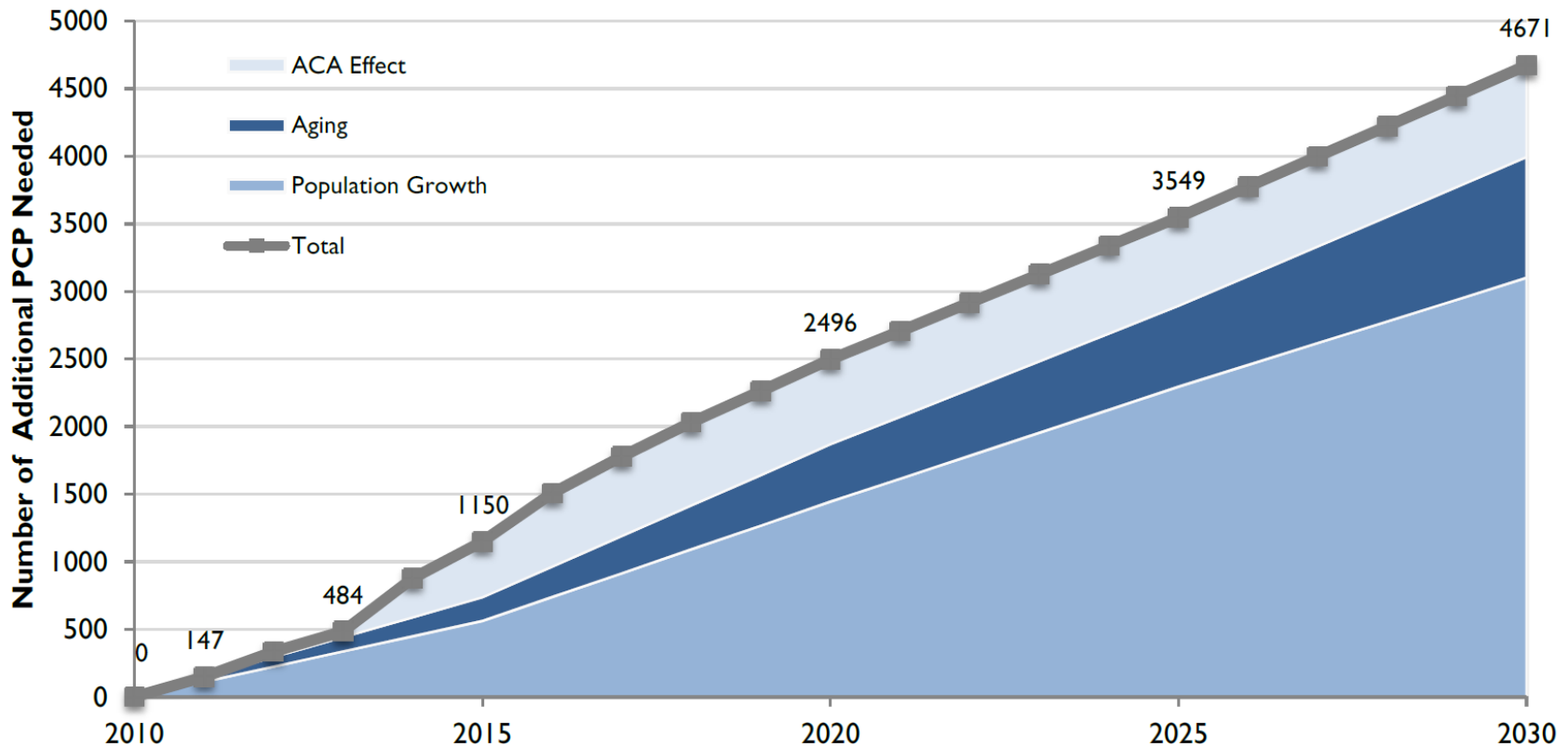
*Total includes primary care, surgical, and medical specialties.



Florida Physician Workforce Shortage

To maintain current rates of utilization, Florida will need an additional 4,671 primary care physicians by 2030, a 38% increase compared to the state's current (as of 2010) 12,228 PCP workforce.

Florida Projected Primary Care Physicians Need



Source: Petterson, Stephen M; Cai, Angela; Moore, Miranda; Bazemore, Andrew. State-level projections of primary care workforce, 2010-2030. September 2013, Robert Graham Center, Washington, D.C.



Physician Workforce Factors for Supply-Demand Gap Analysis

- Demand factors of the physician workforce
 - Geographic distribution
 - Differs by type of provider; primary care, specialties, and sub-specialties
 - Retirement and retention
 - Data is available for the above factors in the 2013 Physician Workforce Annual Report
 - Policy changes, such as Patient Protection and Affordable Care Act implementation, reimbursement models, and scope of practice laws
- Supply factors of the physician workforce
 - Graduate Medical Education (GME)
 - Data is available from recent reports:
 - Office of Program Policy Analysis and Government Accountability (OPPAGA) 2014 GME Report
 - Board of Governors 2009 GME Report
 - AAMC Florida Physician Workforce Profile reports on GME positions and retention
 - Undergraduate Medical Education (UME)
 - Data is available from various sources:
 - University Work Plans offer projected enrollments and tuition of SUS medical schools
 - National Resident Matching Program reports on residency matching
 - AAMC Florida Physician Workforce Profile reports on UME enrollments and retention



Graduate Medical Education

Excerpted from the
OPPAGA
presentation to the
House Health Care
Appropriations
Subcommittee on
February 11, 2014

Florida Medical School Graduates

- In 2013, Florida GME had 9% more positions than they could fill with Florida medical school graduates
 - In academic year 2012-13, approximately 980 students graduated from medical school
 - GME institutions reported 1,081 available positions for residents starting programs
- Florida medical schools project a 25% increase in graduates by academic year 2017-18
- For GME program, 15 institutions reported planned growth in 31 specialties with a total of 339 positions by academic year 2018-19

We should be cautious not to interpret this as providing enough GME in Florida



Undergraduate Medical Education

Medical Student Headcount Enrollments		Estimated Actual 2013-14	Funded 2014-15	Planned 2014-15	Planned 2015-16	Planned 2016-17	Planned 2017-18	Planned 2018-19	Planned 2019-20
Florida Atlantic University	RESIDENT	156	205	205	205	205	205	205	205
	NON-RESIDENT	31	51	51	51	51	51	51	51
	TOTAL	187	256	256	256	256	256	256	256
Florida International University	RESIDENT	308	385	368	402	402	402	402	402
	NON-RESIDENT	60	55	72	78	78	78	78	78
	TOTAL	368	440	440	480	480	480	480	480
Florida State University	RESIDENT	472	471	472	474	472	472	472	472
	NON-RESIDENT	9	9	9	10	11	8	8	8
	TOTAL	481	480	481	484	483	480	480	480
University of Central Florida	RESIDENT	269	*	316	347	362	362	362	362
	NON-RESIDENT	82	*	103	113	118	118	118	118
	TOTAL	351	*	419	460	480	480	480	480
University of Florida	RESIDENT	524	513	513	513	513	513	513	513
	NON-RESIDENT	6		27	27	27	27	27	27
	TOTAL	530	513	540	540	540	540	540	540
University of South Florida	RESIDENT	468	480	480	480	480	480	480	480
	NON-RESIDENT	16	0	16	16	16	16	16	16
	TOTAL	496	480	496	496	496	496	496	496
State University System		TOTAL	2,413	2,169	2,632	2,716	2,735	2,732	2,732

Source: Florida Board of Governors, 2014-2015 University Work Plans



Physician Assistant Demand

- Physician shortages will increase demand for physician assistants.
- The percentage of physician assistants practicing primary care will partially determine how much of the physician shortage is alleviated.



Physician Assistant Supply

- Two PA programs in the SUS inventory of academic programs: at USF and UF
- The UF program: 121 enrollees and 59 graduates in 2013
- Non-SUS Florida programs: 357 graduates in 2012
- Proposed programs: FSU, FAU, FGCU, and a partnership between UWF and UF

Sources: Florida Board of Governors Interactive University Database accessed online at <http://flbog.edu> on 3/15/14 and the Integrated Postsecondary Education Data System accessed online at <http://nces.ed.gov/ipeds/datacenter/> on 3/15/14



Next Steps

- On-going work on the Environmental Scan
 - Supply-demand gap analysis for 15 occupational groups will continue
 - Presentation today from Dr. Alma Littles on health care delivery issues
 - Surveys on health-related research have been turned in by the universities and information will be compiled and presented



Supplemental Slide 1: Healthcare Exchange Enrollments

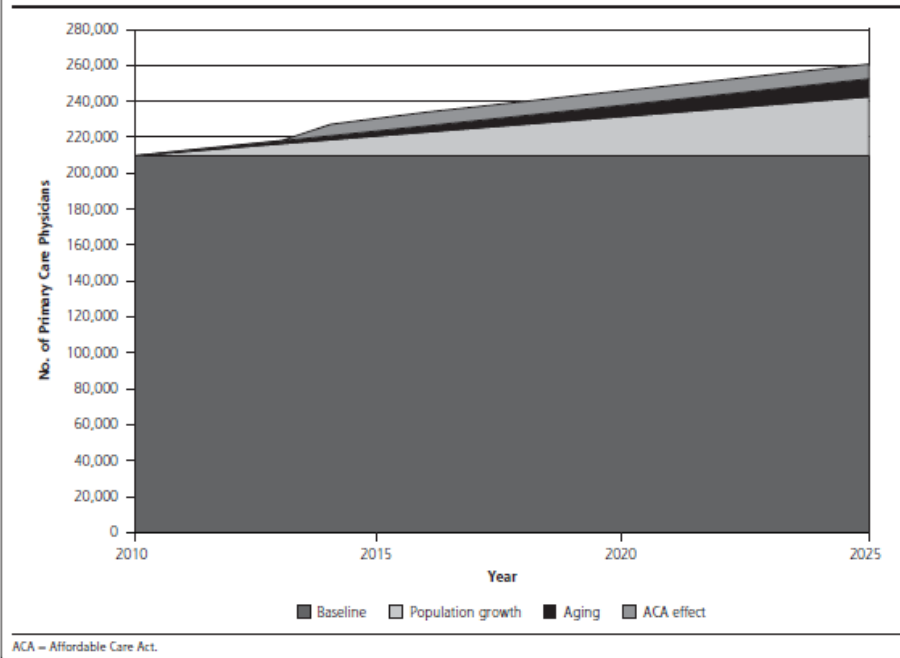
Location	Marketplace Type	Total Number of Individuals Determined Eligible to Enroll in a Marketplace Plan	Number of Individuals Eligible to Enroll in a Marketplace Plan with Financial Assistance	Determined or Assessed Eligible for Medicaid/CHIP by the Marketplace	Number of Individuals Who Have Selected a Marketplace Plan	Data as of
United States		13,547,592	8,748,037	6,724,660	8,019,763	4/19/2014
1. California	State-based	1,886,867	1,458,433	1,700,000 ¹	1,405,102	4/19/2014
2. Florida	Federally-facilitated	1,603,575	1,114,877	180,479	983,775	4/19/2014
3. Texas	Federally-facilitated	1,371,157	835,519	141,494	733,757	4/19/2014
4. New York	State-based	707,638	369,380	646,018	370,451	4/19/2014

Source: Keiser Family Foundation, accessed online at <http://kff.org> on 6/23/14.



Supplemental Slide 2: Florida Physician Workforce

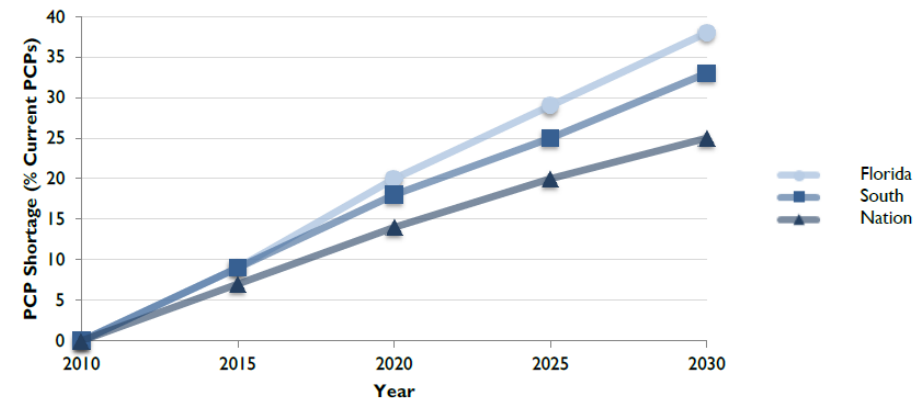
Figure 2. Growing need for primary care physicians, 2010-2025.



ANNALS OF FAMILY MEDICINE • WWW.ANNFAMMED.ORG • VOL. 10, NO. 6 • NOVEMBER/DECEMBER 2012

Source: Annals of Family Medicine, accessed at <http://annfammed.org/content/10/6/503.full> on 7/15/14.

Physician Demand Comparison – State, Region, Nation



Source: Petterson, Stephen M; Cai, Angela; Moore, Miranda; Bazemore, Andrew. State-level projections of primary care workforce, 2010-2030. September 2013, Robert Graham Center, Washington, D.C.



Supplemental Slide 3: Physician Workforce Supply



Florida Physician Workforce Profile

2	State Population:	19,317,568	Total Female Physicians:	13,040
0	Population ≤ age 18	4,240,843	Total Medical or Osteopathic Students	4,781
1	Total Active Physicians:	48,852	Total Residents:	3,632
2	Primary Care Physicians:	16,381		

For additional data, including maps and tables, please see the 2013 State Physician Workforce Data Book online at www.aamc.org/statedatabook

		FL	FL Rank	State Median
Physician Supply	Active Physicians per 100,000 Population, 2012	252.9	23	244.5
	Total Active Patient Care Physicians per 100,000 Population, 2012	226.4	20	217.6
	Active Primary Care Physicians per 100,000 Population, 2012	84.8	30	90.3
	Active Patient Care Primary Care Physicians per 100,000 Population, 2012	77.4	29	81.5
	Percent Active Female Physicians, 2012	26.7%	39	30.8%
	Percent of Active Physicians who are International Medical Graduates, 2012	35.3%	3	18.2%
	Percentage of Active Physicians Who Are Age 60 or Older, 2012	29.4%	11	26.5%
Undergraduate Medical Education (UME)	Students Enrolled in Medical or Osteopathic School per 100,000 Population, AY 2012-2013	24.7	33	29.1
	Students Enrolled in <i>Public</i> Medical or Osteopathic Schools per 100,000 Population, AY 2012-2013	11.9	34	18.8
	Percent Change in Students Enrolled in Medical or Osteopathic Schools (2002-2012)	109.1%	4	18.6%
	Percent of Medical School Matriculants from In-State, AY 2012-2013	64.7%	26	67.7%
Graduate Medical Education (GME)	Total Residents/Fellows in ACGME Programs per 100,000 Population as of December 31, 2011	19.0	42	26.8
	Total Residents/Fellows in Primary Care ACGME Programs per 100,000 Population as of Dec. 31, 2011	6.6	45	10.4
	Percentage of International Medical Graduates in ACGME Programs as of December 31, 2011	29.4%	13	22.4%
	Ratio of Residents and Fellows (GME) to Medical and Osteopathic Students (UME), AY 2011-2012	0.9	29	1.05
	Percent Change in Residents and Fellows in ACGME-Accredited Programs, 2001-2011	29.5%	11	19.7%
Retention	Percent of Physicians Retained in State from Undergraduate Medical Education, 2012	49.8%	9	38.7%
	Percent of Physicians Retained in State from Undergraduate Medical Education (<i>Public</i>), 2012	52.2%	8	44.9%
	Percent of Physicians Retained in State from Graduate Medical Education, 2012	58.7%	4	44.9%
	Percent of Physicians Retained in State from UME and GME Combined, 2012	77.8%	6	68.1%

State Rank: How a particular state ranks compared to the other 49. Rank of 1 goes to the state with the highest value for the particular category.

State Median: The value directly in the middle of the 50 states, so 25 are above the median and 25 are below and excludes the District of Columbia and Puerto Rico.

Source: 2013 State Physician Workforce Data Book

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