In 2015, the Columbia-Willamette Workforce Collaborative (CWWC) published its first Healthcare Workforce Plan for the Portland-Vancouver metro area. Recognizing that long-term care was a growing and indispensable industry within our communities, the CWWC focused on long-term care in the 2015-2017 workforce plan.

The 2018-2021 Healthcare Workforce Plan has expanded to be inclusive of all components within the Healthcare industry, including long-term care.

Data show that the Healthcare industry continues to be a cornerstone of our regional economy in the Portland-Vancouver metro area. Currently, Healthcare makes up approximately 10 percent of the region’s private sector employment and 11 percent of payroll, and is projected to grow by 28 percent over the next ten years.

Healthcare has many high-paying job opportunities, with over half of the jobs in the industry paying $20 or more an hour. Due to the 24-7 demand, hours are flexible and can accommodate employees’ personal schedules. While roughly half of jobs in Healthcare require a 4-year degree or higher education, many jobs require just a short vocational training for entry-level positions with unlimited opportunity for career advancement. With the increase in an aging population, retirements, and the number of people needing access to Healthcare, the industry is hard at work to meet its capacity. Additionally, as the population in the region becomes more diverse, the number of diverse Healthcare employees will also need to increase to reflect the demographics of the changing population.

In January of 2018, the CWWC held a Healthcare workforce convening to discuss these challenges and to begin the process of engaging employers, educators, and other stakeholders in the development of the 2018-2021 regional Healthcare Workforce Plan. Creating a regional Healthcare Plan allows the collaborative to identify common industry workforce challenges, coalesce around shared goals, and align the efforts of the public workforce system to make a greater overall impact for the Healthcare sector.

Employers, training providers, and stakeholders identified three priority areas for the 2018-2021 Healthcare Workforce Plan; recruit and retain Healthcare professionals, build a Healthcare pipeline through employer and education partnerships, and advance diversity, equity and inclusion in Healthcare.

The CWWC will collaborate with employers, training providers, industry experts, and job seekers from diverse communities and backgrounds to meet the high demand in this industry, foster inclusive working environments, and facilitate partnerships between employers and educators. Meeting with the Healthcare panel quarterly allows the Collaborative to regularly engage the industry to ensure that workforce development strategies adapt to the ever-changing needs of employers. Over the next three years the CWWC will convene workgroups of industry experts to strategize on the designated goals.
ABOUT THE COLUMBIA-WILLAMETTE WORKFORCE COLLABORATIVE

The Columbia-Willamette Workforce Collaborative (Collaborative) is a partnership between Clackamas Workforce Partnership, Workforce Southwest Washington and Worksystems: the three Workforce Development Boards covering the Portland- Vancouver metropolitan area. The Collaborative delivers a unified approach to serving industry, supporting economic development, and guiding public workforce training investments to better address the needs of our combined labor shed.

We know that people are willing to travel throughout the region for the best opportunities and that employers need the most qualified workers regardless of where they live. By working together, we can cultivate our regional talent pool and build the foundation for a strong economy.

ABOUT THIS REPORT

The Collaborative is focused on aligning and investing resources to support the workforce needs of four sectors: Advanced Manufacturing, Healthcare, Technology, and Construction. Sectors are chosen based on factors such as their economic significance to the region, current number of openings and job growth projections, average wages that support self- sufficiency, and career ladder opportunities across the skill continuum. By examining labor market intelligence (such as the data contained in this report) and vetting the information with business partners, we are able to better understand industry trends, identify current and emergent workforce needs, and develop customized solutions for each sector.
OVERVIEW

With more than 118,000 jobs and a payroll over $7 billion, Healthcare accounts for 10 percent of the Portland-Vancouver metro area’s private-sector employment and 11 percent of payroll.

The Healthcare sector contributed approximately $10.6 billion to the metro area’s Gross Domestic Product in 2017; 6.4 percent of all output.

The Healthcare sector includes hospitals, offices of physicians, dentists, and other Healthcare providers, such as outpatient health clinics (ambulatory care), and nursing and residential facilities.

Healthcare employment is proportionately distributed across the region; each county’s share of the region’s sector employment roughly matches its share of total employment.

Healthcare Jobs by County

- Multnomah: 48,800; 41%
- Washington: 24,200; 21%
- Clackamas: 18,000; 15%
- Clark: 17,300; 15%
- Yamhill: 3,900; 3%
- Cowlitz: 5,100; 4%
- Remainder: 1,000; 1%

* Columbia, Skamania, Wahkiakum

Healthcare Employment by Component

- Ambulatory Health Care Services: 56,900; 48%
- Hospitals (Private): 32,600; 28%
- Nursing and Residential Care Facilities: 28,900; 24%

Source: EMSI
FIRM CHARACTERISTICS

FIRMS BY SIZE CLASS: HEALTHCARE
PORTLAND-VANCOUVER METRO AREA 2017

There are roughly 6,200 Healthcare establishments in the region. The average size of a Healthcare firm is slightly larger than the average for all firms: 14 employees versus 12 overall. Half of the region’s Healthcare employment is in establishments employing more than 100 people. The vast majority of Healthcare establishments are smaller offices of Healthcare professionals. However, more than one-quarter of employment is found in the region’s major hospitals.

Source: Oregon Employment Department, Washington Employment Security Department

MAJOR EMPLOYERS

<table>
<thead>
<tr>
<th>Ambulatory Care</th>
<th>Hospitals</th>
<th>Nursing and Residential Care</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diabetes and Nutrition Center</td>
<td>Adventist Health</td>
<td>CDM Caregiving Services</td>
</tr>
<tr>
<td>Oregon Anesthesiology Group</td>
<td>Kaiser Permanente</td>
<td>Marquis Care</td>
</tr>
<tr>
<td>Oregon Hematology Oncology Assoc.</td>
<td>Legacy Health</td>
<td>Mary’s Woods at Marylhurst</td>
</tr>
<tr>
<td>The Oregon Clinic</td>
<td>Lower Columbia Mental Health</td>
<td>Robison Jewish Home</td>
</tr>
<tr>
<td>Tuality Healthcare</td>
<td>OHSU</td>
<td>Trillium Family Services</td>
</tr>
<tr>
<td>Cancer Center - Southwest</td>
<td>Tuality Healthcare</td>
<td>Provide Home Infusion</td>
</tr>
<tr>
<td>Bluecross Blueshield of Oregon</td>
<td>PeaceHealth</td>
<td>Willamette View Health Center</td>
</tr>
<tr>
<td>The Vancouver Clinic</td>
<td>Providence Health &amp; Services</td>
<td></td>
</tr>
</tbody>
</table>

Source: Equifax (EMSI), The Business Journal, The Oregonian
LOCATION QUOTIENTS
HEALTHCARE AND COMPONENTS
PORTLAND-VANCOUVER METRO AREA, 2017

A location quotient greater than 1 indicates an industry with a higher concentration of employment relative to the nation.

The lower LQ in Healthcare is largely due to this industry’s economies of scale that occur in larger/densely populated areas.

<table>
<thead>
<tr>
<th>Industry</th>
<th>Location Quotient</th>
</tr>
</thead>
<tbody>
<tr>
<td>Healthcare</td>
<td>0.92</td>
</tr>
<tr>
<td>Ambulatory Health Care Services</td>
<td>0.95</td>
</tr>
<tr>
<td>Hospitals (Private)</td>
<td>0.79</td>
</tr>
<tr>
<td>Nursing and Residential Care Facilities</td>
<td>1.05</td>
</tr>
</tbody>
</table>

Source: EMSI

SHIFTS IN HEALTHCARE DELIVERY

The landscape of Healthcare has changed over the past few decades, reflecting a shift in the way services are delivered. Ambulatory Healthcare is growing rapidly, and consequently representing a greater share of employment. More people are turning to doctors’ offices and clinics (outpatient services) for Healthcare. This trend primarily grew in recent years because of the Affordable Care Act, as more people attach to primary care practitioners. Also, as Health reform shifts practitioners’ focus from treatment to prevention, there will likely be shifts in delivery that result in workforce changes – such as an increased need for Community Health Workers.

<table>
<thead>
<tr>
<th>Year</th>
<th>Ambulatory Health Care Services</th>
<th>Hospitals</th>
<th>Nursing and Residential Care Facilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>1990</td>
<td>38%</td>
<td>39%</td>
<td>23%</td>
</tr>
<tr>
<td>2017</td>
<td>48%</td>
<td>28%</td>
<td>24%</td>
</tr>
</tbody>
</table>

Source: EMSI
Healthcare is a key driver of employment growth at both the national and local level. Healthcare added jobs throughout the recession, nationally and locally; the only major industry to do so.

Overall, the Portland-Vancouver region’s Healthcare sector outperformed national growth between 2007 and 2017. It grew twice as fast than the overall economy between 2007 and 2017, led by the ambulatory care component (e.g. doctors’ offices). Of the more than 126,000 jobs added to the region since 2007, over one in five have been in the Healthcare sector.

Over 21 percent of the region’s Healthcare workforce is at, or nearing, retirement age. Due in part to the aging workforce, area employers have identified leadership training as a key industry need.

Fifteen Healthcare-related occupations have a quarter or more of its workforce in the region aged 55 or older. Registered nurses, one of the most in-demand occupations across all sectors, has 26 percent of its regional workforce near retirement age. Other occupations with older-than-average workforces include dentists (33%), general practitioners, surgeons, and pediatricians (26%) and medical records technicians (26%).
The Healthcare workforce is overwhelmingly female: women outnumber men by more than three-to-one.

Whites make up the vast majority of the Healthcare workforce (87%); about the same as the workforce as a whole. The workforce has more Blacks and fewer Hispanics than the average across all industries.

Source: EMSI
More than 400 occupations are found in the Healthcare sector.

Eight of the ten largest occupations are unique to the sector and not usually found elsewhere in the economy.

Fifty five percent of workers are directly involved in patient care.

Office and administrative occupations are the third largest group; 15 percent of sector employment.

**TOP HEALTHCARE OCCUPATIONS (ALL INDUSTRIES): PORTLAND-VANCOUVER METRO AREA**

<table>
<thead>
<tr>
<th>Occupation</th>
<th>2017 Employment</th>
<th>2027 Employment</th>
<th>Projected Annual Growth Openings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registered Nurses</td>
<td>19,074</td>
<td>22,322</td>
<td>325</td>
</tr>
<tr>
<td>Nursing Assistants</td>
<td>7,207</td>
<td>9,185</td>
<td>198</td>
</tr>
<tr>
<td>Medical Secretaries</td>
<td>5,877</td>
<td>7,146</td>
<td>127</td>
</tr>
<tr>
<td>Medical Assistants</td>
<td>5,665</td>
<td>7,177</td>
<td>151</td>
</tr>
<tr>
<td>Personal Care Aides</td>
<td>4,636</td>
<td>6,496</td>
<td>186</td>
</tr>
<tr>
<td>Dental Assistants</td>
<td>3,595</td>
<td>4,313</td>
<td>72</td>
</tr>
<tr>
<td>Physicians and Surgeons, All Other</td>
<td>3,241</td>
<td>3,781</td>
<td>54</td>
</tr>
<tr>
<td>Receptionists and Information Clerks</td>
<td>3,136</td>
<td>4,211</td>
<td>108</td>
</tr>
<tr>
<td>Home Health Aides</td>
<td>2,734</td>
<td>3,956</td>
<td>122</td>
</tr>
<tr>
<td>Dental Hygienists</td>
<td>2,552</td>
<td>3,032</td>
<td>48</td>
</tr>
</tbody>
</table>

*Source: EMSI*
TOP HEALTHCARE OCCUPATIONS (SECTOR): PORTLAND-VANCOUVER METRO AREA

<table>
<thead>
<tr>
<th>Occupation</th>
<th>2017 Sector Employment</th>
<th>% of Sector Employment</th>
<th>2017 Median Wage</th>
<th>% of Median Wage, All Occupations</th>
<th>Location Quotient</th>
<th>Typical Entry Level Education</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registered Nurses</td>
<td>19,074</td>
<td>16.1%</td>
<td>$42.87</td>
<td>217%</td>
<td>0.98</td>
<td>Bachelor's degree</td>
</tr>
<tr>
<td>Nursing Assistants</td>
<td>7,207</td>
<td>6.1%</td>
<td>$14.64</td>
<td>74%</td>
<td>0.71</td>
<td>Postsecondary nondegree award</td>
</tr>
<tr>
<td>Medical Secretaries</td>
<td>5,877</td>
<td>5.0%</td>
<td>$18.73</td>
<td>95%</td>
<td>1.37</td>
<td>High school diploma or equivalent</td>
</tr>
<tr>
<td>Medical Assistants</td>
<td>5,665</td>
<td>4.8%</td>
<td>$17.94</td>
<td>91%</td>
<td>1.14</td>
<td>Postsecondary nondegree award</td>
</tr>
<tr>
<td>Personal Care Aides</td>
<td>4,636</td>
<td>3.9%</td>
<td>$11.41</td>
<td>58%</td>
<td>0.79</td>
<td>High school diploma or equivalent</td>
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<tr>
<td>Dental Assistants</td>
<td>3,595</td>
<td>3.0%</td>
<td>$20.79</td>
<td>105%</td>
<td>1.34</td>
<td>Postsecondary nondegree award</td>
</tr>
<tr>
<td>Physicians and Surgeons, All Other</td>
<td>3,241</td>
<td>2.7%</td>
<td>$83.58</td>
<td>424%</td>
<td>1.39</td>
<td>Doctoral or professional degree</td>
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<tr>
<td>Receptionists and Information Clerks</td>
<td>3,136</td>
<td>2.7%</td>
<td>$14.47</td>
<td>73%</td>
<td>0.94</td>
<td>High school diploma or equivalent</td>
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<tr>
<td>Home Health Aides</td>
<td>2,734</td>
<td>2.3%</td>
<td>$11.20</td>
<td>57%</td>
<td>0.53</td>
<td>High school diploma or equivalent</td>
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<tr>
<td>Dental Hygienists</td>
<td>2,552</td>
<td>2.2%</td>
<td>$37.05</td>
<td>188%</td>
<td>1.51</td>
<td>Associate's degree</td>
</tr>
<tr>
<td>Total All Occupations</td>
<td>118,348</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: EMSI

The top 10 occupations make up nearly half of all employment.

EDUCATIONAL REQUIREMENTS

HEALTHCARE EMPLOYMENT BY TYPICAL ENTRY-LEVEL EDUCATION
PORTLAND-VANCOUVER METRO AREA, 2017

Forty-five percent of jobs in Healthcare require an Associate’s degree or higher compared to just 31 percent of all industries.

Source: EMSI
### TRAINING AND DEGREE GRADUATE COMPLETER DATA FOR HEALTHCARE-RELATED PROGRAMS
#### PORTLAND-VANCOUVER METRO AREA

<table>
<thead>
<tr>
<th>Training</th>
<th>Regional completions (2017)</th>
<th>Regional openings* (2017)</th>
<th>Award less than 1 year</th>
<th>Award 1 but less than 2 years</th>
<th>Associate's</th>
<th>Award at least 2 but less than 4 years</th>
<th>Bachelor's</th>
<th>Postbac. Certificate</th>
<th>Master's</th>
<th>Post-Masters Cert.</th>
<th>Doctorate</th>
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</thead>
<tbody>
<tr>
<td>Registered Nursing/Registered Nurse</td>
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<td>1,822</td>
<td>514</td>
<td>916</td>
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<td>4</td>
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<tr>
<td>Medical/Clinical Assistant</td>
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<td>1,007</td>
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<td>1,093</td>
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<tr>
<td>Dental Assisting/Assistant</td>
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<td>514</td>
<td>101</td>
<td>251</td>
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<tr>
<td>Health/Health Care Administration/Management</td>
<td>263</td>
<td>299</td>
<td>22</td>
<td>107</td>
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<td>Licensed Practical/Vocational Nurse Training</td>
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<td>256</td>
<td>242</td>
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<tr>
<td>Community Health and Preventive Medicine</td>
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<td>527</td>
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<tr>
<td>Clinical Nutrition/Nutritionist</td>
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<td>46</td>
<td>1</td>
<td>157</td>
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<tr>
<td>Medicine</td>
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<td>294</td>
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<td></td>
<td>138</td>
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<tr>
<td>Public Health, Other</td>
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<td>299</td>
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<td></td>
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<tr>
<td>Chiropractic</td>
<td>125</td>
<td>43</td>
<td></td>
<td></td>
<td></td>
<td>125</td>
<td></td>
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<tr>
<td>Audiology/Audiologist</td>
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<td>8</td>
<td></td>
<td></td>
<td></td>
<td>79</td>
<td>44</td>
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</tr>
<tr>
<td>Pharmacy Technician/Assistant</td>
<td>117</td>
<td>325</td>
<td>16</td>
<td>90</td>
<td>11</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Dental Hygiene/Hygienist</td>
<td>96</td>
<td>225</td>
<td>37</td>
<td>59</td>
<td></td>
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<td></td>
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<td>Optometry</td>
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<td>Physician Assistant</td>
<td>95</td>
<td>65</td>
<td>3</td>
<td>92</td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>Pharmacy</td>
<td>90</td>
<td>153</td>
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<td></td>
<td></td>
<td>90</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Physical Therapy/Therapist</td>
<td>89</td>
<td>138</td>
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<td></td>
<td></td>
<td>89</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medical Insurance Coding Specialist/Coder</td>
<td>73</td>
<td>1,104</td>
<td>54</td>
<td>19</td>
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<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Dentistry</td>
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<td>48</td>
<td></td>
<td></td>
<td></td>
<td>70</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Health Services/Allied Health/Health Sciences, General</td>
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<td>9,660</td>
<td>68</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>Medical Office Management/Administration</td>
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<td>886</td>
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<td></td>
<td></td>
<td>66</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mental Health Counseling/Counselor</td>
<td>65</td>
<td>332</td>
<td>18</td>
<td>47</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Surgical Technology/Technologist</td>
<td>60</td>
<td>108</td>
<td>43</td>
<td>17</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Health Information/Medical Records Technology/Technician</td>
<td>55</td>
<td>218</td>
<td>3</td>
<td>52</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

*Table continued on next page*
## TRAINING AND DEGREE GRADUATE COMPLETER DATA FOR HEALTHCARE-RELATED PROGRAMS
### PORTLAND-VANCOUVER METRO AREA (CON’T)

<table>
<thead>
<tr>
<th>Training</th>
<th>Regional completions (2017)</th>
<th>Regional openings* (2017)</th>
<th>Type of Credential Granted</th>
<th>Award less than 1 year</th>
<th>Award of at least 1 but less than 2 years</th>
<th>Associate’s</th>
<th>Award at least 2 but less than 4 years</th>
<th>Bachelor’s</th>
<th>Postbac. Certificate</th>
<th>Master’s</th>
<th>Post-Masters Cert.</th>
<th>Doctorate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Respiratory Care Therapy/Therapist</td>
<td>50</td>
<td>60</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medical Radiologic Technology/Science - Radiation Therapist</td>
<td>36</td>
<td>112</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Radiologic Technology/Science - Radiographer</td>
<td>36</td>
<td>124</td>
<td>14</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nursing Assistant/Aide and Patient Care Assistant/Aide</td>
<td>35</td>
<td>1,347</td>
<td>35</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medical Administrative/Executive Assistant and Medical Secretary</td>
<td>32</td>
<td>2,374</td>
<td>32</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phlebotomy Technician/Phlebotomist</td>
<td>32</td>
<td>214</td>
<td>32</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clinical/Medical Laboratory Technician</td>
<td>18</td>
<td>98</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Physical Therapy Technician/Assistant</td>
<td>17</td>
<td>1,033</td>
<td>17</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ophthalmic Technician/Technologist</td>
<td>17</td>
<td>128</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emergency Medical Technology/Technician (EMT Paramedic)</td>
<td>16</td>
<td>165</td>
<td>15</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medical Insurance Specialist/Medical Biller</td>
<td>9</td>
<td>918</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Source:** EMSI

The institution data in this report is taken directly from the national IPEDS database published by the U.S. Department of Education’s National Center for Education Statistics.

*Openings are not mutually exclusive—certain CIP codes translate to multiple SOC codes so openings may be counted multiple times for different programs.
Aggregate data from online job postings can provide insights to hiring trends in the region. There appears to be a mismatch between in-demand hard skills and the availability of these skills in workforce profiles. For example, over 60 percent of Healthcare-related online postings in the region mention nursing as a skill, however, just 20 percent of the regional workforce has this skill listed in their profile.

Mismatches also exist in common skills such as management and problem solving.
The average annual wage for Healthcare in the region is $59,300, which is 7 percent higher than the average across all industries and 8 percent higher than its national counterpart.

Wages in the nursing and residential care component are lower than average due in part to the prevalence of low-paying occupations: four of the five largest occupations, which comprise nearly half of total employment, pay an average of $12 per hour. Registered nurses are the only exception in this component with median hourly earnings of nearly $43 per hour.

Nationally, this component has more part-time employment than other areas of Healthcare and the overall economy, further pulling down average annual wages for this sector.

In Oregon, Healthcare’s median hourly wage is $22.01 (2016); 27 percent higher than that of all industries ($17.32).

Overall, there are relatively fewer lower-paying jobs and more higher-paying jobs than the rest of the economy.

Nearly three in five Oregon Healthcare jobs pay $20/ hour or more.
Washington has similar trends to Oregon, with three in five Healthcare jobs in the state paying $20/hour or more. And as with Oregon, higher-paying jobs comprise a greater share of the industry compared to the rest of the economy.

**Turnover**

**Turnover Rate in Healthcare**

**Portland-Vancouver Metro Area, 2017**

<table>
<thead>
<tr>
<th>Category</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total, Healthcare</td>
<td>7.8%</td>
</tr>
<tr>
<td>Ambulatory Health Care Services</td>
<td>7.6%</td>
</tr>
<tr>
<td>Hospitals (Private)</td>
<td>4.3%</td>
</tr>
<tr>
<td>Nursing and Residential Care Facilities</td>
<td>12.8%</td>
</tr>
<tr>
<td>Total, All Industries (private sector)</td>
<td>9.8%</td>
</tr>
</tbody>
</table>

Source: Oregon Employment Dept. analysis of U.S. Census Bureau (LEHD) data

Turnover refers to the change in the workforce due to employee separations and hiring.

Overall, Healthcare has less turnover than the overall economy. The exception is long-term care workers at 12.8 percent, which is significantly higher than economy-wide turnover rate of 9.8 percent. According to the National Commission for Quality Long-Term Care, this is attributed to low job satisfaction, poor pay and benefits, and the emotional and physical toll of providing long-term care.

Hospital workers are twice as likely to stay at their jobs compared to all private sector workers.
LARGEST NUMBER OF VACANCIES IN HEALTHCARE-RELATED OCCUPATIONS
PORTLAND TRI-COUNTY, 2017

<table>
<thead>
<tr>
<th>Occupation</th>
<th>2017 Vacancies, All Industries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Care Aides</td>
<td>589</td>
</tr>
<tr>
<td>Nursing Assistants</td>
<td>334</td>
</tr>
<tr>
<td>Registered Nurses</td>
<td>194</td>
</tr>
<tr>
<td>Pharmacy Technicians</td>
<td>123</td>
</tr>
<tr>
<td>Medical Assistants</td>
<td>115</td>
</tr>
<tr>
<td>Ophthalmic Medical Technicians</td>
<td>107</td>
</tr>
<tr>
<td>Physical Therapists</td>
<td>86</td>
</tr>
<tr>
<td>Physicians and Surgeons, All Other</td>
<td>76</td>
</tr>
<tr>
<td>Medical Records and Health Information Technicians</td>
<td>76</td>
</tr>
<tr>
<td>Occupational Therapists</td>
<td>38</td>
</tr>
<tr>
<td>Surgical Technologists</td>
<td>38</td>
</tr>
<tr>
<td>Phlebotomists</td>
<td>38</td>
</tr>
</tbody>
</table>

Occupations with Significant Employment and Vacancies Within the Healthcare Sector

<table>
<thead>
<tr>
<th>Occupation</th>
<th>2017 Vacancies, All Industries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Operations Specialists, All Other</td>
<td>371</td>
</tr>
<tr>
<td>Office and Administrative Support Workers, All Other</td>
<td>147</td>
</tr>
<tr>
<td>Receptionists and Information Clerks</td>
<td>233</td>
</tr>
<tr>
<td>Bus Drivers, School or Special Client</td>
<td>160</td>
</tr>
</tbody>
</table>

*Tri-County: Clackamas, Multnomah, Washington counties
NOTE: Information not available for SW Washington
Source: Oregon Employment Department, 2017 Job Vacancy Survey*
CURRENT SUPPLY

REGISTERED JOBSEEKERS HEALTHCARE:  
PORTLAND METRO AREA (OREGON PORTION)

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Jobseekers¹</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Care Aides</td>
<td>1,005</td>
</tr>
<tr>
<td>Nursing Assistants</td>
<td>497</td>
</tr>
<tr>
<td>Medical Secretaries</td>
<td>907</td>
</tr>
<tr>
<td>Medical Records and Health Information Technicians</td>
<td>622</td>
</tr>
<tr>
<td>Dental Hygienists</td>
<td>24</td>
</tr>
<tr>
<td>Licensed Practical and Licensed Vocational Nurses</td>
<td>73</td>
</tr>
<tr>
<td>Registered Nurses</td>
<td>146</td>
</tr>
<tr>
<td>Home Health Aides</td>
<td>840</td>
</tr>
<tr>
<td>Dental Assistants</td>
<td>100</td>
</tr>
<tr>
<td>Medical Assistants</td>
<td>521</td>
</tr>
</tbody>
</table>

¹ Data represents jobseekers registered with The Oregon Employment Department, iMatchSkills (active status: June 2018). Data is self-reported.

Portland Metro Area (Oregon portion): Clackamas, Columbia, Multnomah, Washington, Yamhill counties

NOTE: Information not available for SW Washington
Source: Oregon Employment Department

There are several ways to depict the current supply of workers. Unemployment Insurance (UI) claimants are a subset of jobseekers and do not include those unemployed workers who don’t qualify for, or have exhausted, benefits. This data is only available in Washington State. Persons registered with the Oregon Employment Department are both employed and unemployed jobseekers including but not limited to those receiving unemployment benefits. This is a much larger pool of workers than UI claimants.

UNEMPLOYMENT INSURANCE CLAIMANTS  
SOUTHWEST WASHINGTON

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Claimants¹</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical and Health Services Managers</td>
<td>11</td>
</tr>
<tr>
<td>Physical Therapists</td>
<td>0</td>
</tr>
<tr>
<td>Registered Nurses</td>
<td>16</td>
</tr>
<tr>
<td>Dental Hygienists</td>
<td>4</td>
</tr>
<tr>
<td>Licensed Practical and Licensed Vocational Nurses</td>
<td>5</td>
</tr>
<tr>
<td>Medical Records and Health Information Technicians</td>
<td>17</td>
</tr>
<tr>
<td>Home Health Aides</td>
<td>40</td>
</tr>
<tr>
<td>Nursing Assistants</td>
<td>17</td>
</tr>
<tr>
<td>Massage Therapists</td>
<td>1</td>
</tr>
<tr>
<td>Dental Assistants</td>
<td>4</td>
</tr>
<tr>
<td>Medical Assistants</td>
<td>15</td>
</tr>
<tr>
<td>Personal Care Aides</td>
<td>39</td>
</tr>
<tr>
<td>Medical Secretaries</td>
<td>7</td>
</tr>
</tbody>
</table>

¹ Data represents claimants registered with The Washington Employment Security Department (active status, May 2018).

Southwest Washington: Clark, Cowlitz, Wahkiakum, Skamania counties

In Southwest Washington, there were 176 unemployed workers claiming unemployment insurance in Healthcare’s 10 largest occupations (May 2018). Over half of the claimants worked as personal/home care aides and nursing assistants.
**CURRENT DEMAND**

**HEALTHCARE OCCUPATIONS WITH LARGEST NUMBER OF ONLINE JOB POSTINGS**

**PORTLAND-VANCOUVER METRO AREA, JUNE 2017 - MAY 2018**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Registered Nurses</td>
<td>9,577</td>
<td>798</td>
<td>23 days</td>
</tr>
<tr>
<td>Medical and Health Services Managers</td>
<td>1,554</td>
<td>130</td>
<td>45 days</td>
</tr>
<tr>
<td>Nursing Assistants</td>
<td>1,305</td>
<td>109</td>
<td>61 days</td>
</tr>
<tr>
<td>Personal Care Aides</td>
<td>1,137</td>
<td>95</td>
<td>52 days</td>
</tr>
<tr>
<td>Medical Assistants</td>
<td>1,020</td>
<td>85</td>
<td>49 days</td>
</tr>
<tr>
<td>Licensed Practical and Licensed Vocational Nurses</td>
<td>911</td>
<td>76</td>
<td>41 days</td>
</tr>
<tr>
<td>Social and Human Service Assistants</td>
<td>836</td>
<td>70</td>
<td>36 days</td>
</tr>
<tr>
<td>Physical Therapists</td>
<td>826</td>
<td>69</td>
<td>39 days</td>
</tr>
<tr>
<td>Medical Secretaries</td>
<td>668</td>
<td>56</td>
<td>39 days</td>
</tr>
<tr>
<td>Occupational Therapists</td>
<td>642</td>
<td>54</td>
<td>37 days</td>
</tr>
<tr>
<td>Customer Service Representatives</td>
<td>606</td>
<td>51</td>
<td>41 days</td>
</tr>
<tr>
<td>Family and General Practitioners</td>
<td>581</td>
<td>48</td>
<td>53 days</td>
</tr>
<tr>
<td>Home Health Aides</td>
<td>581</td>
<td>48</td>
<td>36 days</td>
</tr>
<tr>
<td>Physician Assistants</td>
<td>563</td>
<td>47</td>
<td>36 days</td>
</tr>
<tr>
<td>First-Line Supervisors of Office and Administrative Support Workers</td>
<td>507</td>
<td>42</td>
<td>35 days</td>
</tr>
<tr>
<td>Physicians and Surgeons, All Other</td>
<td>479</td>
<td>40</td>
<td>45 days</td>
</tr>
<tr>
<td>Nurse Practitioners</td>
<td>455</td>
<td>38</td>
<td>43 days</td>
</tr>
<tr>
<td>Speech-Language Pathologists</td>
<td>433</td>
<td>36</td>
<td>32 days</td>
</tr>
<tr>
<td>Dental Assistants</td>
<td>428</td>
<td>36</td>
<td>56 days</td>
</tr>
<tr>
<td>Medical Records and Health Information Technicians</td>
<td>370</td>
<td>31</td>
<td>35 days</td>
</tr>
</tbody>
</table>

*Source: EMSI*

Unique job postings denote the number of de-duplicated job advertisements listed by different companies on career sites and job boards. A longer median posting duration suggests firms struggle to hire in those occupations relative to others.
The Healthcare sector is projected to grow 28 percent by 2028 (+33,000 jobs); more than double than the overall economy (+13%). The greatest number of new jobs will be in Multnomah County. The four counties that comprise the Washington portion of the CWWC will have job growth in Healthcare of over 30 percent in the next decade.

Healthcare will account for roughly one-in-six new jobs throughout the region between 2018 and 2028.

Growth will be driven by:

- An expanding population: the Portland-Vancouver metro area is expected to add nearly 200,000 new residents between 2018 and 2028, a growth of 7 percent compared to just 4 percent across the nation.
- An aging population: The 65+ age group will make up 82 percent of population growth through 2028.
- Longer life expectancies combined with new treatments and technologies.
Home health/personal care aides and LPN’s will be the fastest-growing larger occupations; all are expected to grow at least 40 percent over the next decade.

Registered Nurses will continue to add the largest number of jobs, accounting for 11 percent of the sector’s growth.

Much of the growth in these occupations will be the result of increased demand for long-term Healthcare services as the expanding elderly population requires more care.
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The Columbia-Willamette Workforce Collaborative

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