



The Impact of Future Trends on the Healthcare Workforce

September 12, 2007

AMN HEALTHCARE[®]

Agenda

- **Trends:**
Healthcare Workforce & Delivery
- **Impacts:**
Consumer Demand & Workforce Management
- **Actions:**
Addressing the Shortage Through Collaboration
- **Q & A**

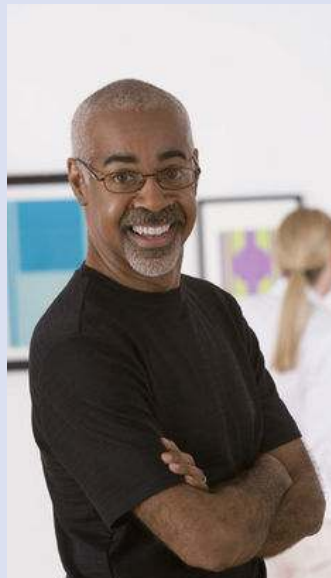
TRENDS

Generations at Work

Silent Generation



Baby Boomers



Generation X



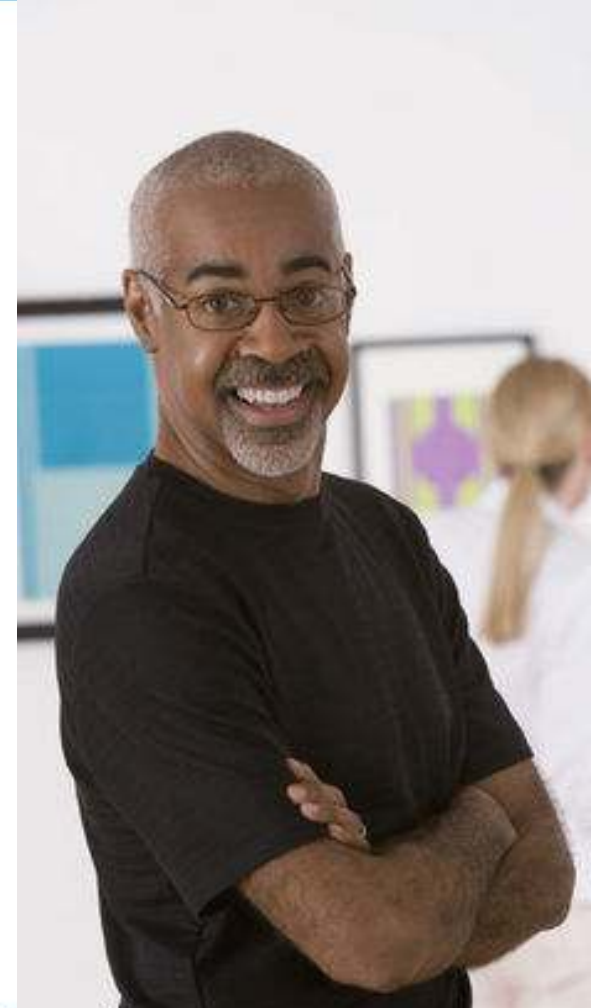
Millennials (Generation Y)



Baby Boomers

(Born 1943 – 1960)

- Raised during post-World War II economic boom
- Work ethic and low savings rate may delay retirement age
- Like being in control of their environment
- Have high consumer expectations that caters to their preferences
- Greater ideological zeal – enjoy influencing younger generations



Generation X

(Born 1961 – 1981)

- Raised as “latchkey” kids; grew up with MTV
- Independent lifestyle and distrust of institutions
- Less loyal to employers than previous generations
- Entrepreneurial, do-it-yourself attitude. Likes to enjoy being “own boss”
- Individualism drives consumer preferences for customized products
- Less involved in politics and public policy



The Millennials (Generation Y)

(Born 1982+)

- Accustomed to “hands-on” parental involvement and structured activities where “every child wins an award”
- More conventional, favors large institutions
- Technology savvy and socially conscious generation
- Team-oriented, enjoys collaboration
- Needs constant feedback and workplace recognition
- Seeks “perfect” work/life balance; unwilling to work the hours as prior generations have

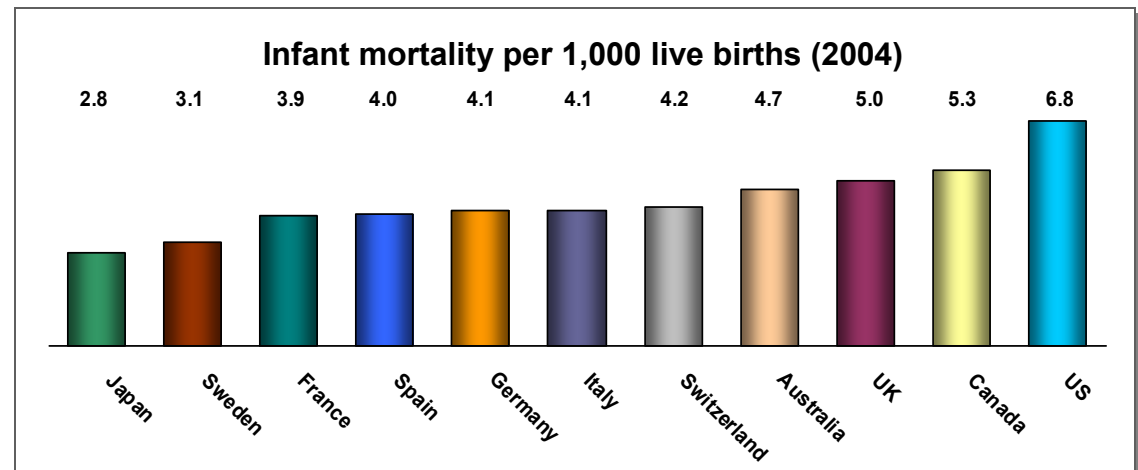
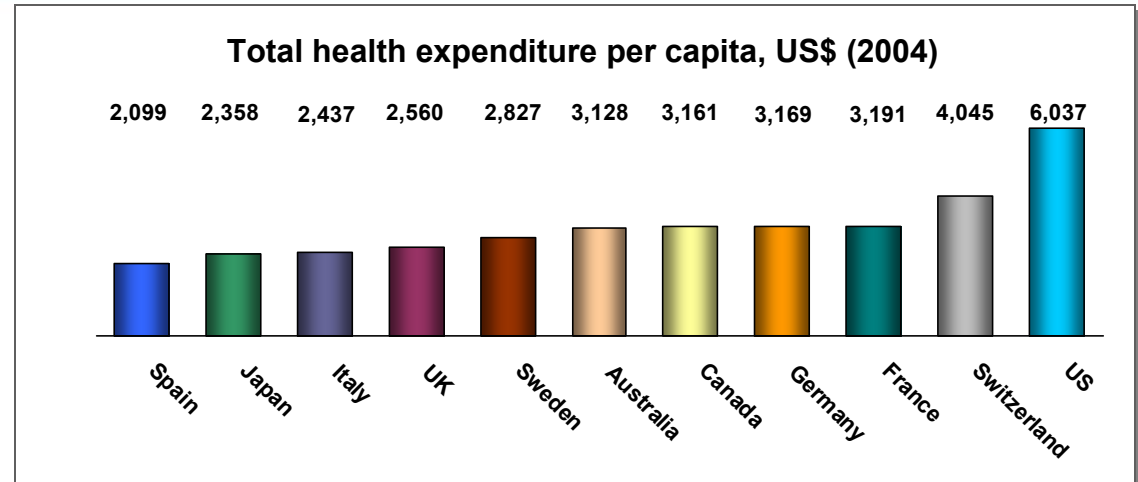


U.S. Per Capita Healthcare Spend is High

The U.S. outspends other industrialized nations in healthcare ...



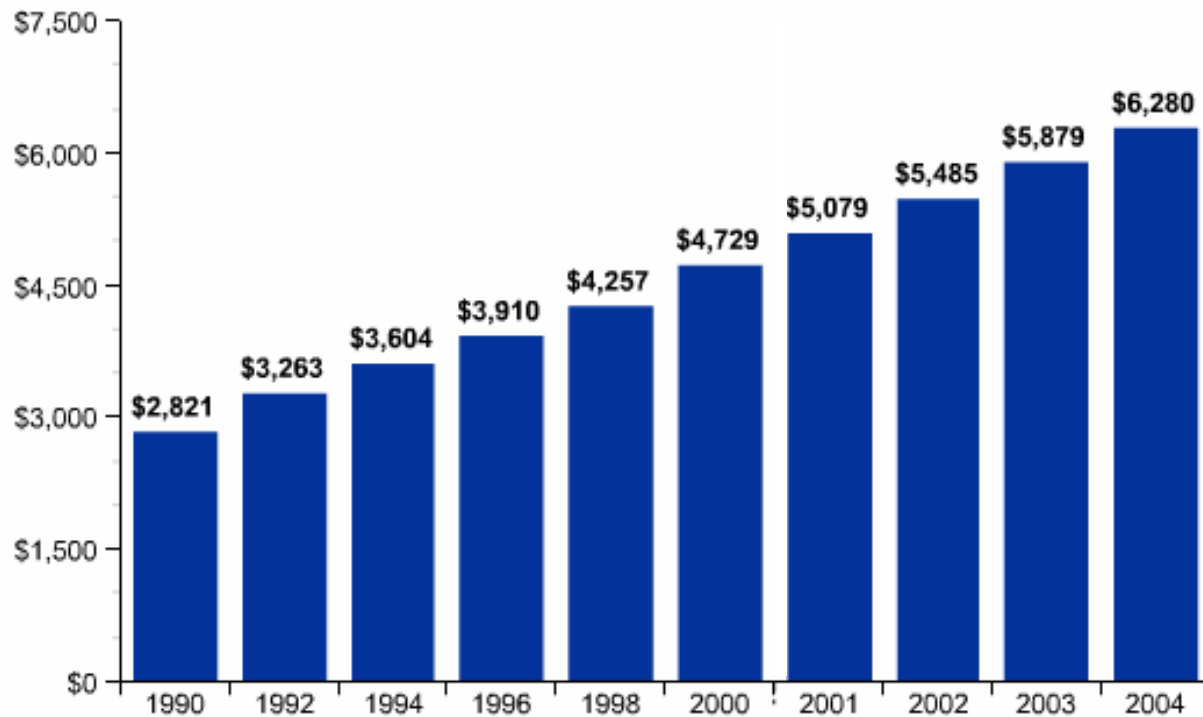
Yet patient outcomes are not necessarily better.



source: OECD

Healthcare Costs Continue to Rise

National Health Expenditures per Capita, 1990-2004



Source: Kaiser Health Foundation, CMS

Healthcare Cost Drivers



- Aging population as a driver of higher patient acuity
- Continuing technological advancements to meet patient acuity and expectations
- Additional specialization of skills to support technology and patient acuity
- Current payment structures favoring volume over efficient distribution of resources

IMPACTS

Consumer-Directed Healthcare



- Push for pay-for-performance, price transparency & quality measures will spur greater efficiency & value
- Consumers will bear more of the burden of healthcare costs
- Consumer directed healthcare will lead to increased patient focus on costs and outcomes
- Patients are more engaged and knowledgeable about medicine

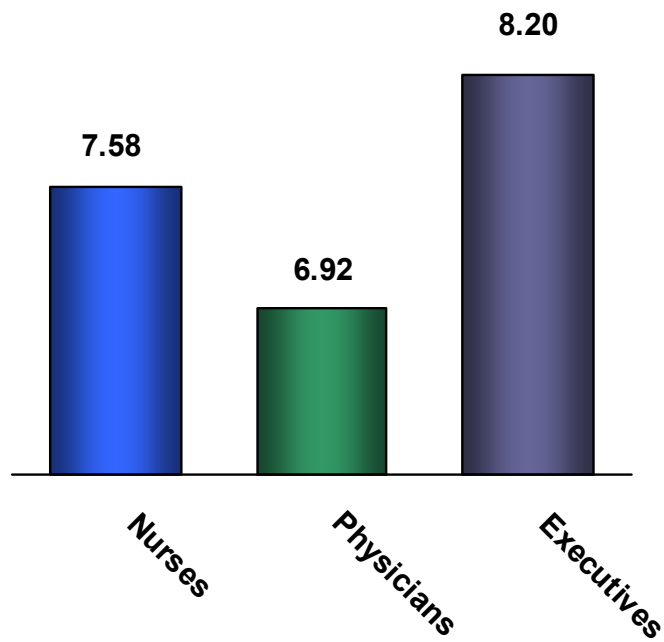
Workforce of the Future

- Need more specialized workforce to support advancing technology
- Desire greater workforce flexibility to meet increasing need for work-life balance
- Workers are increasingly “socially conscious” of their employers and purchases
- Want greater focus on patient care and reduced bureaucracy or paperwork
- Future workers thrive in team, group atmosphere
- Need increased collaboration among all levels of healthcare providers

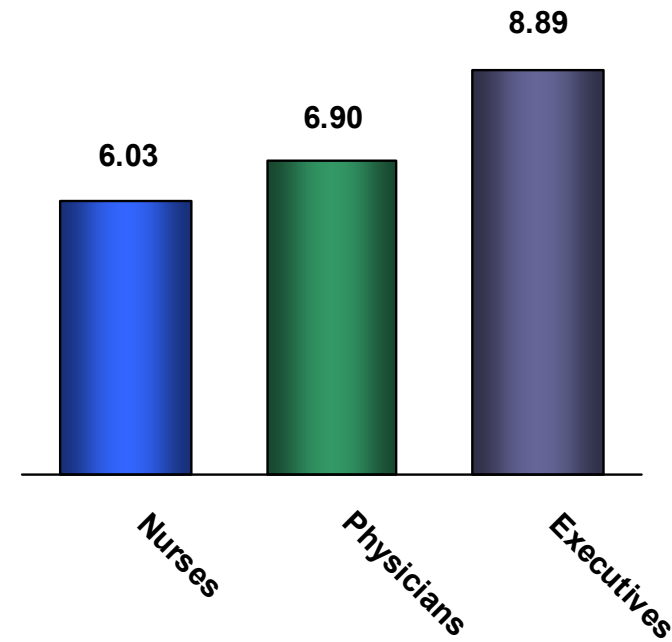


A Gap in Nurse/Physician Relationships

How do you rate the overall significance of nurse/physician relationships at your hospital?



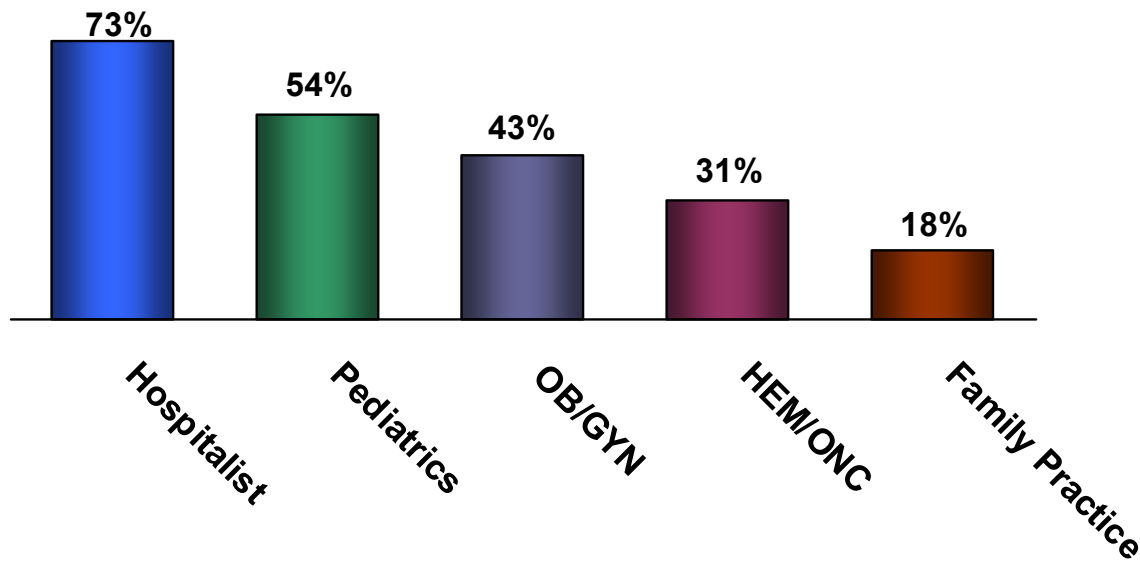
How do you rate administrative support of nurses in conflicts with physicians?



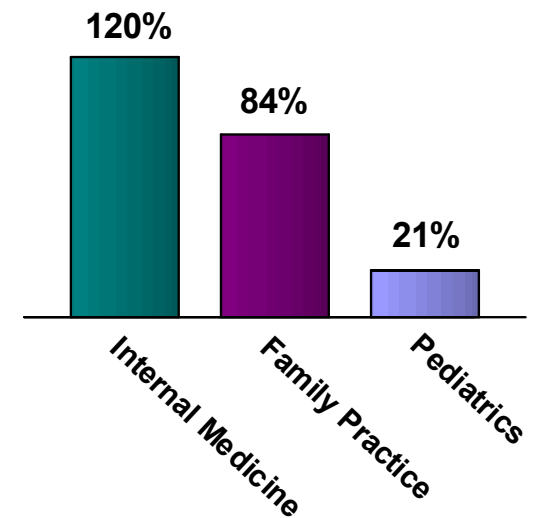
Source: Rosenstein (2002), *Journal of Nursing Administration*

Growing Preference for “Job-like” Physicians Specialties

**Largest Growth in Number of
Search Assignments from
2005/06 - 2006/07 (top five)**



**Growth in Primary
Care Searches /
2003/04 – 2006/07**

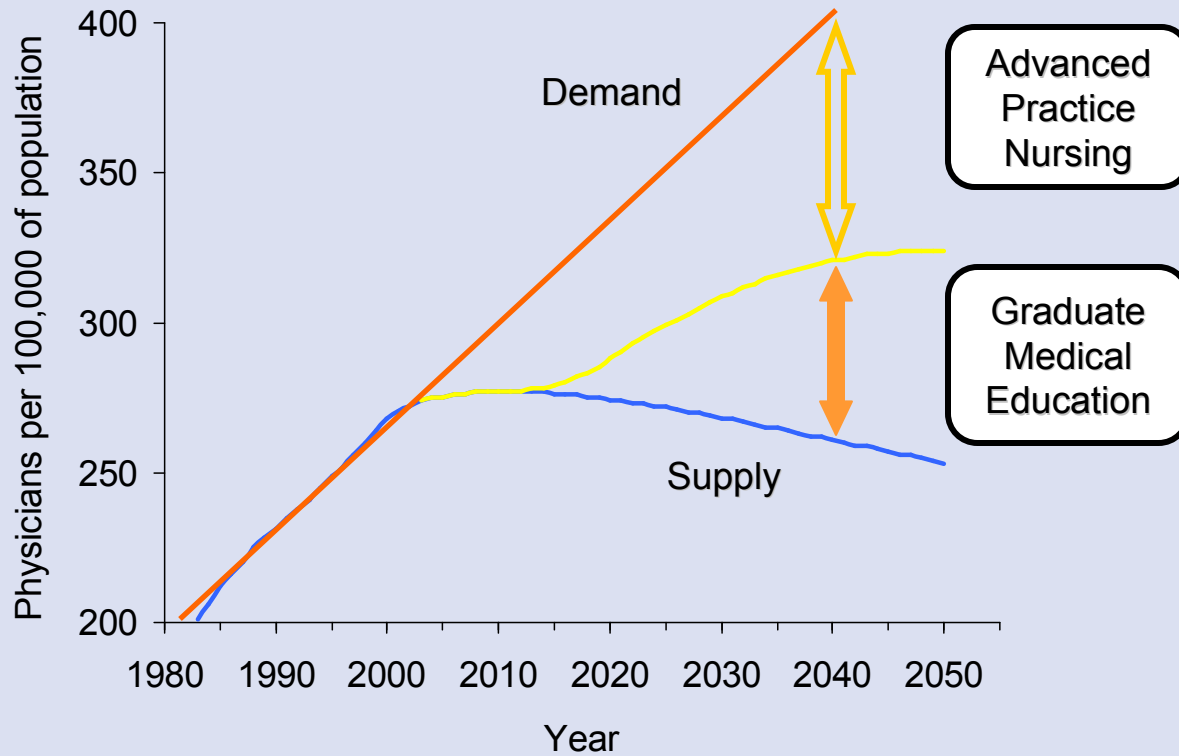


Source: The MHA Group

ACTIONS

How Can Providers Address the Shortage?

Dual Response to the Projected Physician Shortage

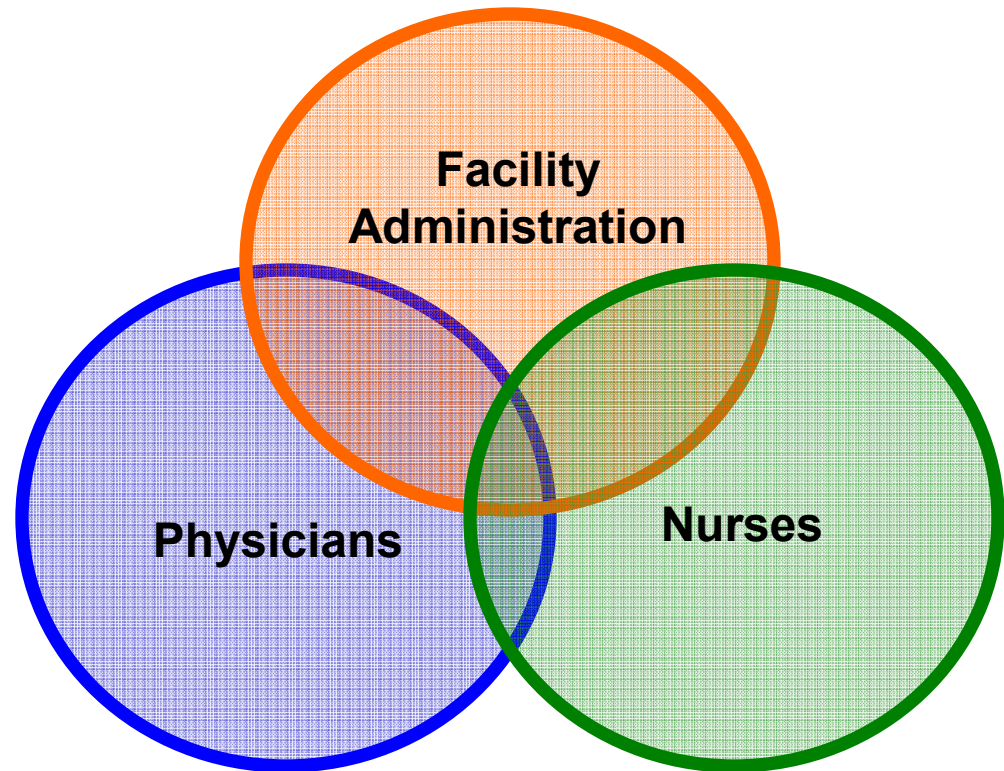


Physicians and nurses are interdependent and shortages in either discipline exacerbate shortages in the other.

How Can Providers Address the Shortage?



Create new partnership between nursing and medicine to train a new generation of professionals who will be capable of working synergistically across the full range of services, from prevention and health promotion to disease management.



Other Recommendations

Increase productivity to address staffing shortages



Address increasing demands of patients



Support generational preferences; leverage inter-generational collaboration in workforce



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