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2012 SURVEY OF REGISTERED NURSES

JOB SATISFACTION, CAREER PATTERNS AND TRAJECTORIES

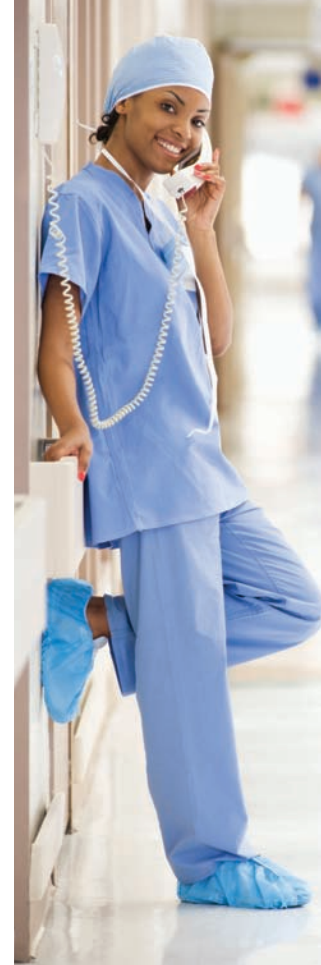
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2012 SURVEY OF REGISTERED NURSES

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INTRODUCTION

This study explores current career plans and trends, satisfaction levels and professional concerns for registered nurses (RNs). In the next one to three years a considerable number of nurses may pursue employment outside of nursing, shift to part-time roles, retire or otherwise modify their career paths in some way, according to this report. As the economy continues to recover, issues such as nursing retention and turnover within healthcare facilities, will be essential in planning for future nurse staffing. Therefore, it is important to know how nurses truly perceive their profession. Their candid feelings, expressed in these survey results, may influence their peers and the next generation of nurses.

AMN Healthcare conducted its annual 2012 Survey of Registered Nurses to answer these and related questions. The survey inquiries mirror those asked in the 2011 Survey of Registered Nurses, and include a few new components. Data from previous surveys conducted in 2010 and 2011 are compared to the 2012 data in this report, unveiling some remarkable findings.

The 2012 survey offers a snapshot of current job satisfaction levels among nurses and also indicates how the economic recovery may affect future career trajectories. The data suggest how nurses currently view the quality of nursing care, and whether they believe healthcare reform will help address the predicted nursing shortage. These results are offered as an information resource for healthcare industry leaders, policy-makers, academics, staffing professionals, analysts, and others who follow clinical staffing and supply trends.

The following data points provide background describing the current nursing supply and demand situation:

- Nursing is the nation’s largest healthcare profession, with more than 3.1 million RNs nationwide.
- Of all licensed RNs, 2.6 million or 84.8 percent are employed in nursing. That means about 500,000 licensed nurses don’t work in the nursing field, but potentially could do so.
- The nation’s ability to train new nurses to replace retiring nurses is significantly compromised by the limited number of faculty members at nurse training programs.
- According to the American Association of Colleges of Nursing (AACN), U.S. nursing schools turned away 58,327 qualified applicants from entry-level baccalaureate nursing programs in 2011 (up from 52,115 in 2010) due to insufficient numbers of faculty, clinical sites, classrooms, clinical preceptors and budget constraints.
- Almost two-thirds of the nursing schools cited faculty shortages as a reason for not accepting all qualified applicants.
- AACN reported that there was a 5.1 percent enrollment increase in entry-level baccalaureate programs in nursing in 2011, but this increase is not sufficient to meet the projected demand for nursing services.



For additional information about this survey or other surveys conducted by AMN Healthcare and its family of companies, please contact: deborah.linggi@amnhealthcare.com } AMN Healthcare
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- The Patient Protection and Affordable Care Act of 2010 is projected to provide 32 million Americans with access to healthcare services.
- In July 2010, the Tri-Council for Nursing cautioned about declaring an end to the nursing shortage. The economic downturn led to an easing of the shortage in many parts of the country, but the Tri-Council noted that the limitations of the nation’s education system will slow the graduation of RNs. That, coupled with the passage of the Patient Protection and Affordable Care Act, is projected to increase demand for nursing services.
- According to the projections released by the Bureau of Labor Statistics (BLS), registered nurses top the list of the 10 occupations with the largest projected job growth in the years of 2002-2012. Although RNs have ranked among the top 10 growth occupations in the past, this is the first time in recent history that RNs have ranked first.
- The total job openings, which include job growth and the net replacement of nurses, will be more than 1.1 million. This growth, coupled with current trends of nurses retiring or leaving the profession and few new nurses, could lead to a nursing shortage of more than one million nurses by the end of this decade. (www.bls.gov/emp/#outlook)
- Current projections for 2025 indicate a shortage of 260,000 registered nurses (Dr. Peter Buerhaus, “The Recent Surge in Nurse Employment: Causes and Implications,” June 2009). A shortage of this magnitude would be twice as large as any nursing shortage experienced in this country since the mid-1960s.

KEY FINDINGS

AMN Healthcare’s 2012 Survey of Registered Nurses was conducted following an economic recession and in the midst of an economic upswing, albeit not an aggressive recovery. In addition, the first parts of the Patient Protection and Affordable Care Act of 2010 were being implemented and more fully understood.

The survey reflects how RNs modified career plans due to the recession and how they have begun to respond to the economic recovery. In addition, the survey addresses registered nurses’ perceptions of the impact of healthcare reform on the nursing shortage.

- Less than one-fifth (17%) of nurses plan to seek a new place of employment as the economy recovers, a decline from the 24% who said they would seek a new place of employment in the 2011 survey.

- RNs are still more likely to be employed by a hospital where there is permanent employment. However, down by 7% (total of 57%) from 2011. Thirty-one percent of nurses plan to take steps in the next one to three years that would take them out of nursing altogether (by retiring or seeking non-nursing jobs) or reduce the volume of clinical work they do (by switching to part-time or less demanding roles).
- Sixty-six percent report that they will continue as they are, which is a significant rise from 55% last year.
- A little less than half (40%) said they either would not recommend nursing as a career to young people or were not sure that they would.
- Ninety-one percent of nurses are satisfied with their careers, up significantly from 2011.
- Yet, 44% would either hesitate about becoming a nurse or choose another career entirely if they were making such a professional choice today.
 - o 38% Age 19-39 in 2012 as opposed to 34% in 2011
 - o 44% Age 40-54 in 2012 as opposed to 49% in 2011
 - o 48% Age 50+ in 2012 as opposed to 45% in 2011
- Four percent plan to work as travel nurses in the next one to three years, compared to 14% who said that in 2011.
- Forty percent of nurses will pursue further education in nursing in the next 1-3 years.

METHODOLOGY

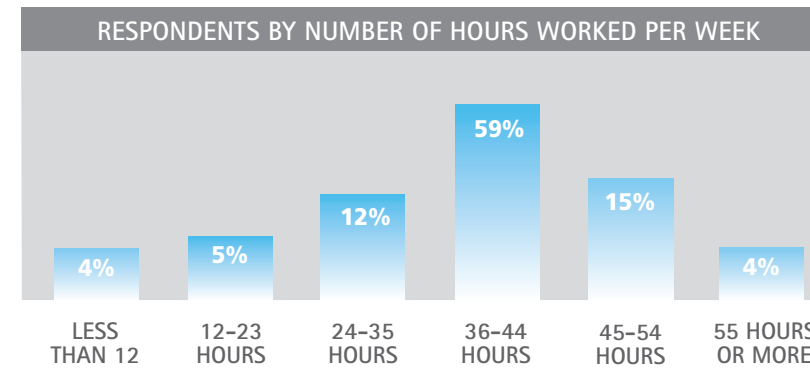
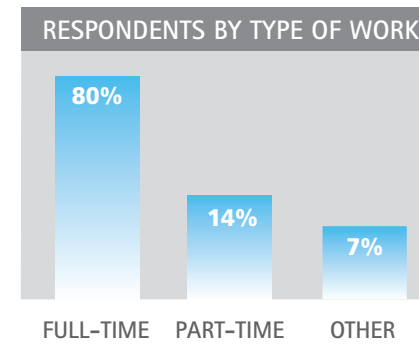
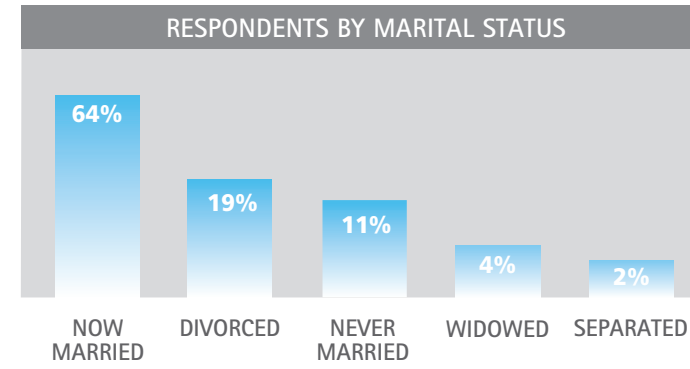
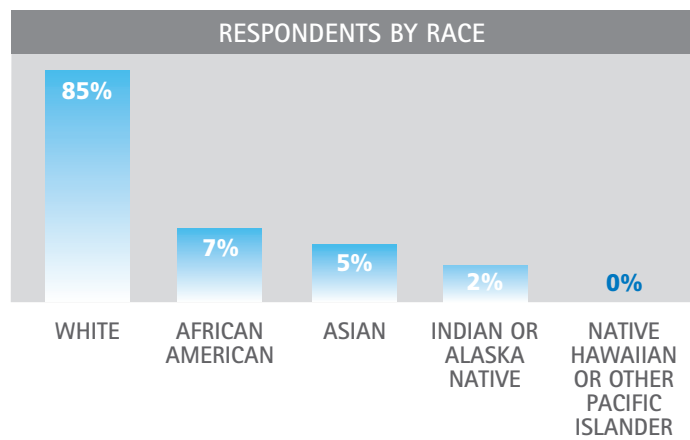
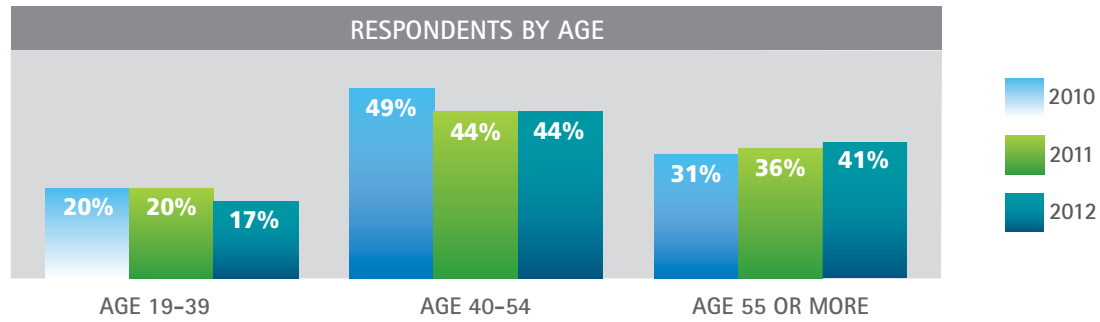
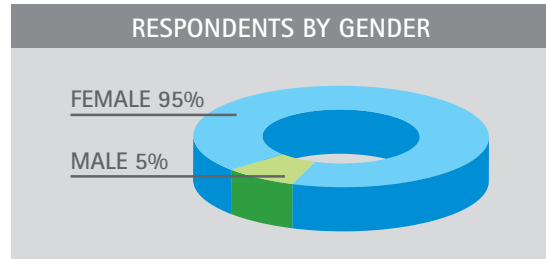
AMN Healthcare’s 2012 Survey of Registered Nurses was distributed via email to registered nurses nationwide. Email surveys were sent to 88,288 RNs who are registered with the Internet portals, NurseZone.com or RN.com. The survey was distributed to nurses in early April 2012, and responses were accepted through April 27, 2012. The charts on the following pages provide demographic information on those who completed the survey.

Total Surveys Emailed	88,288
Completed Surveys	2,931
Response Rate	3.3%

The data for this survey was tested at the 95 percent significance level.

DEMOGRAPHICS

The total number of job openings, which include job growth and the net replacement of nurses, will be more than 1.1 million.



RESPONDENTS BY YEARS OF EXPERIENCE	2010	2011	2012
Less Than 10 Years	23%	24%	19%
10-19 Years	23%	22%	22%
20-29 Years	24%	24%	25%
30 or More Years	30%	30%	34%

PRIMARY NURSING SPECIALTY	2010	2011	2012
OR/PACU	10%	17%	13%
Critical Care	13%	15%	11%
Medical/Surgical	12%	15%	12%
ER/Trauma	10%	8%	7%
Management	4%	7%	4%
Telemetry/PCU	4%	7%	4%
Geriatrics/LTC	7%	6%	4%
Psychiatry	5%	5%	4%
Home Health/Hospice	5%	5%	5%
Women's Health/L&D	5%	5%	4%
Pediatrics/PICU	4%	4%	3%
Oncology	3%	4%	3%
NICU/Neonatal	2%	2%	2%
Rehab	1%	0.4%	2%
Other	15%	13%	23%

RESPONDENTS BY PRIMARY EMPLOYMENT SETTING

The current employment setting dropped from 64% of hospital permanent staff in 2011 to 57% in the 2012 survey findings. Hospital temporary staff workers in 2011 comprised 9% of clinicians and declined in 2012 to 5%. These findings may reflect the trend of healthcare delivery gradually moving out of the hospital, with more opportunities for nurses in outpatient, primary care and alternative settings.

PRIMARY EMPLOYMENT SETTING	2011	2012
Hospital Permanent Staff	64%	57%
Hospital Temporary Staff	9%	5%
Home Health/Hospice	6%	5%
Physician Office/Ambulatory Care	5%	6%
Nursing Home/Extended Care	5%	4%
Nursing Education	4%	3%
Public/Community Health	3%	2%
Not Currently Employed	3%	4%
Non-Nursing Field	1%	1%
Other	—	13%

SPECIALTY CERTIFICATION

Specialty certification is becoming more prevalent as the Magnet recognition designation sweeps the country. Nearly 30% of nurses are considering certification in the near future, which would result in nearly three-fourths of all nurses holding a specialty certification.

PERSONAL CERTIFICATION STATUS

I am considering certification in the next one to three years	28%
I am not considering certification in the next one to three years	37%
I am currently certified through my professional organization (eg: CCRN, CNOR, PCCN)	35%





TRENDS AND OBSERVATIONS

AMN Healthcare's 2012 Survey of Registered Nurses is the third annual survey designed to explore how nurses currently feel about their profession and to evaluate their future career plans.

Responses to the 2012 survey indicate that roughly nine out of 10 nurses (91%) are satisfied with their choice of a career; 27% are not satisfied with their particular jobs. Nurses are holding strong overall in their career choice, but consider their current job not a good match for them. That compares to 74% who were pleased with their career choice in the previous survey, and 42% not satisfied with their particular jobs. Overall, from 2011 to 2012, there has been a significant improvement in both career satisfaction and intent to stay in the current job. Should the economy continue to improve, nearly one-third (29%) of nurses said they would alter their career plans, either change employers, work as travel nurses, take steps that would reduce the volume of clinical work they do, or leave patient-care settings altogether. In the 2011 survey, almost half (42%) said they would alter their career plans. In addition, 32% of nurses suggested that, if they have their way, they will not be in their current job one year from now. That is up slightly from 30% in the 2011 survey.

The 2012 survey results show a much improved sense of satisfaction with both career and job, but with a consistent one-third of nurses wanting to move on to something different in the near future. In light of these findings, healthcare facilities should continue their vigilance in the areas of nurse retention and nurse job satisfaction, particularly as the economy begins to improve.



RESPONDENTS BY HIGHEST DEGREE IN NURSING

HIGHEST DEGREE IN NURSING	2010	2011	2012
Diploma	14%	12%	13%
Associate's Degree	38%	35%	38%
Baccalaureate Degree	35%	40%	37%
Master's Degree	12%	12%	11%
Doctoral Degree	0%	0.5%	0%

The 2012 survey results show a much improved sense of satisfaction with both career and job.

QUESTIONS ASKED AND RESPONSES RECEIVED

How confident are you that healthcare reform provides a mechanism that will ensure an adequate supply of qualified nurses?

The 2012 survey further indicates that the great majority (68%) of nurses are not optimistic that healthcare reform will enhance nurse supply. Only 5% of nurses surveyed said they are “very confident” that healthcare reform plans being implemented will ensure an adequate supply of nurses, while 68% said they are either “not very confident” or “not at all confident.” Those numbers are similar to the 2011 survey results.

2010 Total	6%	42%	23%	30%
2011 Total	7%	44%	23%	27%
2012 Total	5%	48%	27%	20%
Age 19–39	9%	46%	32%	13%
Age 40–54	4%	47%	29%	20%
Age 55+	4%	49%	24%	23%
Hospital Permanent Staff	5%	46%	2%	20%
Hospital Temporary Staff	5%	50%	27%	18%
Other Nurse Setting	5%	50%	25%	19%

Very Confident
Somewhat Confident
Not Very Confident
Not at all Confident

Compared to five years ago, how would you assess the nursing shortage today?

Though the economic downturn of the past couple years eased the nursing shortage for some healthcare facilities, more than half (57%) of nurses surveyed perceive that the nursing shortage is worse than it was five years ago, or has gotten no better. That is only a slight decrease from the 2011 results (61%).

When asked to compare the nursing shortage today to five years ago, 28% of nurses said the shortage has gotten worse compared to 31% who said the shortage was worse in the 2011 survey. In addition, 29% said there has been no change to the nursing shortage over the last five years, while 44% said the nursing shortage is not as bad as it was five years ago. The perception is split here; however, with a slight majority (57%) saying the shortage is worse or no better. This opinion implies that nursing turnover may increase if the economy continues to improve. If that occurs, healthcare facilities need to act quickly to ensure the continued stability of their nursing staffs.

2010 Total	33%	39%	28%
2011 Total	31%	39%	30%
2012 Total	28%	44%	29%
Age 19–39	22%	49%	29%
Age 40–54	25%	45%	40%
Age 55+	31%	40%	28%
Hospital Permanent Staff	24%	45%	31%
Hospital Temporary Staff	30%	39%	30%
Other Nurse Setting	32%	42%	26%

The shortage is worse than five years ago
The shortage is not as bad as five years ago
There has been no change



Now that the economy is beginning to recover, how will that affect your career plans?

Nurses were asked what career changes they would make now that the economy is beginning to recover. Sixty-six percent said they would continue working as compared to 55% who said that in 2011. Seventeen percent said that they would retire, work part-time, seek a non-nursing job or take other steps likely to reduce the overall nurse workforce. That is less than the 21% who would retire in the 2011 survey.

One in eight of those responding to the survey said they would take steps that would remove themselves from the nurse workforce entirely, either by retiring or seeking a job in a non-nursing field, a slight decrease from 11% in 2011. Twenty-one percent said they planned to slow down in some way, either by switching to a less demanding role in nursing or by working part-time. Four percent plan to work as travel nurses, which may slightly reduce the total number of hours they work in clinical settings, depending on the number of travel assignments they accept each year. This is considerably less than the eight percent who said they planned to work as travel nurses in the 2011 survey.

Here is some beneficial news for hospitals: only 17% of nurses said they would continue working as a nurse, but seek a new place of employment, a decrease from 24% in 2011. This means that 17% of the RN working pool is roughly 442,000 nurses who are potentially making job moves in the coming months.

Based on these results, healthcare facilities should continue to closely examine their nurse retention practices, evaluating compensation structures, work schedules, and other factors that may contribute to positive nurse retention rates. Even though this percentage has declined this past year, healthcare facilities must remember the age of their nursing workforce by unit so that adequate planning for retirement-related attrition can be managed.

CAREER PLANS	2011	2012
I will continue working as I am	55%	66%
I will continue working as a nurse, but seek a new place of employment	24%	17%
I will work as a travel nurse	8%	4%
I will likely leave nursing and seek work in another field	5%	4%
I will work part-time	5%	4%
I will likely retire	3%	5%

Suppose that in one year the economy is strong again. How will this affect your career plans?



Education plans

AGE AND ITS RELATIONSHIP WITH EDUCATIONAL DEGREE

When asked what percentage plan to pursue a BSN, 17% responded in the affirmative, indicating a weak agreement that education at the bachelor's degree level is relevant and important. In light of the recent IOM recommendations to achieve an 80% BSN-educated workforce by 2020, it is interesting to see the numbers of nurses that are actually considering taking the step up to BSN.

EDUCATION PLAN FOR THE NEXT 1-3 YEARS	19-39	40-45	55+	2012
Pursue a bachelor's degree in nursing	25%	21%	9%	17%
Pursue a master's degree in nursing	37%	21%	7%	18%
Pursue a doctoral degree in nursing	6%	6%	3%	5%
Pursue further education in a field other than nursing	5%	8%	11%	9%
Won't pursue further education	27%	44%	70%	51%

Agreement with workplace statements

Nurses were asked if they agreed with a variety of statements regarding their current workplace. Ninety-one percent of nurses said that they are satisfied with their choice of nursing as a career in the 2012 survey, compared to 74% in 2011. Meanwhile, 73% said that they are satisfied with their current job in 2012, while 58% said they were satisfied with their current job in 2011. These large increases in career and job satisfaction could be indicative of the attention nursing is receiving since the publishing of the IOM report: The Future of Nursing. With a larger degree of focus on nursing and its future, nurses in general feel better about their profession.

More than one-third of nurses (33%) agreed with the statement, "I often feel like resigning from my position." That number was 34% in 2011. Moreover, 50% agreed with the statement, "I worry that this job is affecting my health," up from 48% in the 2011 survey. Slightly less than half (47%) of the nurses agreed with the statement, "I usually have the time I need to spend with my patients." Forty-five percent agreed with that statement in the 2011 survey.

	2010	2011	2012
Overall, I am satisfied with my choice of nursing as a career	78%	74%	91%
I am satisfied with the quality of care I am able to provide in my job	72%	70%	78%
Overall, I am satisfied with my current job	66%	58%	73%
I would encourage others to become a nurse	65%	58%	75%
I worry that this job is affecting my health	46%	48%	50%
I usually have the time I need to spend with my patients	50%	45%	47%
I often feel like resigning from my position	29%	34%	33%
If I have my way, I will not be working in this job a year from now	28%	30%	32%

If you were starting out today, would you choose nursing as your career?

Job satisfaction is important to consider when evaluating nurse retention. The 2012 survey responses reinforce the impression that though the economic downturn may have eased the nurse staffing crunch in some facilities, underlying issues causing job dissatisfaction among nurses still remain, though much less so than reported in 2011. The majority of nurses (55%) said that if they were starting out today, they would choose nursing as their career (unchanged from 2011). On the other hand, 44% said they either would not choose nursing as a career or were not sure if they would if they were starting out today. That also remains unchanged from the previous year. Younger nurses (19-39) were somewhat more positive about their career choice than were more experienced nurses (age 55 or older). Of the younger group, 62% (66% in 2011) said they would choose nursing as a career again, while only 52% (56% in 2011) of the older group would do so.

	Yes	No	Not Sure
2010 Total	59%	19%	21%
2011 Total	55%	23%	21%
2012 Total	55%	20%	24%
Age 19-39	62%	16%	22%
Age 40-54	56%	18%	26%
Age 55+	52%	25%	23%
Hospital Permanent Staff	57%	18%	23%
Hospital Temporary Staff	56%	25%	19%
Other Nurse Setting	54%	23%	23%

Job satisfaction is important to consider when evaluating nurse retention.



Would you encourage your children or other young people to choose nursing as a career today?

The majority of nurses (59%) said that they would recommend nursing as a career to their children or to other young people, while 40% said they would not recommend nursing as a career or were not sure that they would. These 2012 numbers are slightly more optimistic from those in 2011, when they were 57% and 43%, respectively. Nurses age 19-39 were generally more positive about recommending nursing as a career than those ages 55 or older. The majority of nurses (55%) say that if they were starting out today they would choose nursing as their career

2010 Total	64%	20%	16%
2011 Total	57%	24%	19%
2012 Total	59%	21%	19%
Age 19-39	61%	19%	20%
Age 40-54	59%	22%	19%
Age 55+	58%	22%	19%
Hospital Permanent Staff	59%	21%	19%
Hospital Temporary Staff	56%	25%	18%
Other Nurse Setting	60%	21%	18%

■ Yes
■ No
■ Not Sure

How do you view the quality of care nurses provide today compared to the quality of care they provided when you first began as a nurse?

Nurses were asked to compare the quality of care nurses provided when they first entered the profession to the quality of care nurses provide today. The majority (57%) said that the quality of care nurses provide today has declined relative to when they started nursing. Older nurses (age 55 or older) were a bit more severe in their responses. Sixty-six percent of older nurses said that the quality of care nurses provide has declined since they entered nursing, however, only 32% of younger nurses (19-39) said quality of nursing care has declined. Those numbers compare to 63% and 36%, respectively, in 2011.

The survey suggests that nurses have mixed reactions about how they regard the nursing profession overall today compared to when they entered the field. Twenty-three percent agreed with the statement, "Nursing is more dynamic, rewarding, and robust than when I began." Meanwhile, a larger percentage (47%) agreed with the opposite statement, "Nursing is less dynamic, rewarding and robust today than when I began." The remaining 30% agreed with the statement, "Nursing is just as dynamic, rewarding and robust today than when I began."

Slightly less than half (40%) say they either would not recommend nursing as a career to young people, or were not sure that they would.

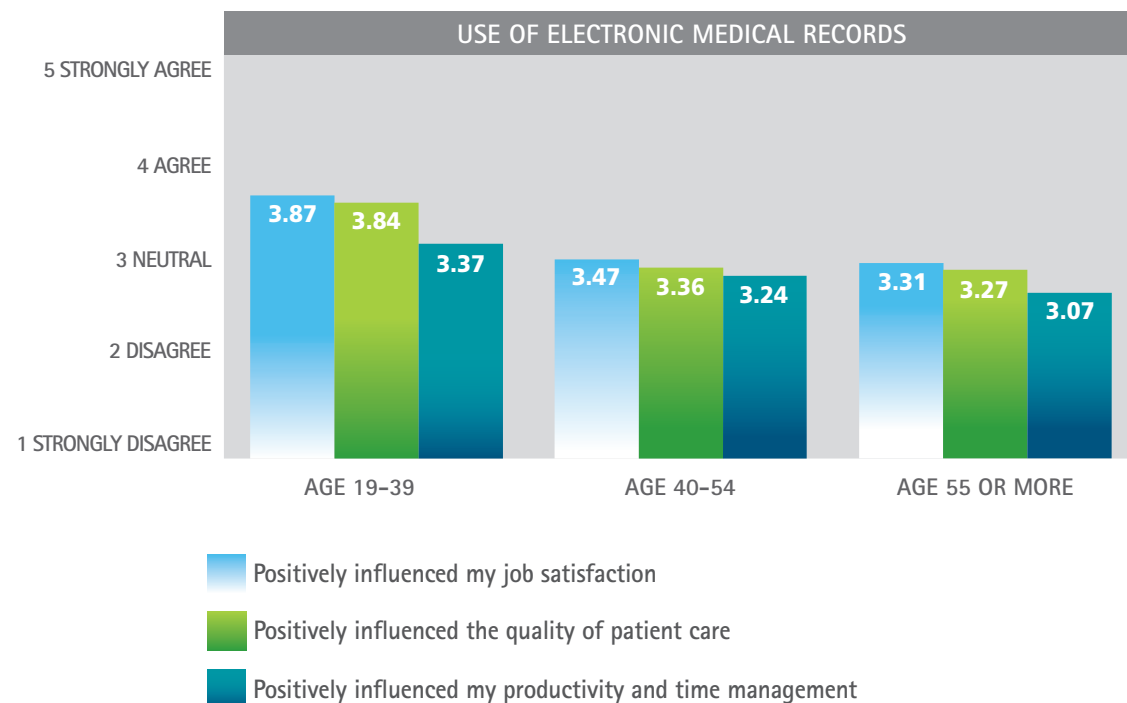
2010 Total	26%	55%	19%
2011 Total	25%	44%	31%
2012 Total	23%	47%	30%
Age 19-39	24%	31%	44%
Age 40-54	22%	47%	31%
Age 55+	24%	53%	23%
Hospital Permanent Staff	25%	45%	30%
Hospital Temporary Staff	18%	46%	36%
Other Nurse Setting	21%	50%	29%

■ Nursing is more dynamic, rewarding and robust today than when I began
■ Nursing is less dynamic, rewarding and robust today than when I began
■ Nursing is just as dynamic, rewarding and robust today than when I began



Level of Agreement with the use of Electronic Medical Records in Facility

Even though the advancement and speed of technology can be daunting, the nursing profession reveals that technology implementations somewhat positively influenced job satisfaction. Technology also contributed to the quality of patient care, possibly causing fewer errors and increasing efficiency. In addition, technology positively influenced productivity, time management and, therefore, overall organization. Still, the use of electronic medical records has an impact on nursing care and productivity that is not overwhelmingly positive right now.



CONCLUSION

AMN Healthcare's 2012 Survey of Registered Nurses suggests that many RNs today are preparing to make a job move as the economy improves. Seventeen percent surveyed say that will seek a new place of employment as the economy continues to recover. Close to one-third said that during the next one to three years they plan to make a career change by switching to a less demanding nursing position, working as a travel nurse, switching to part-time, retiring, or taking other steps.

Of significant concern, 5%, up from 3% in 2011, say they are likely to retire now that the economy is beginning to recover. More specifically, 5% of nurses permanently employed in a hospital setting indicate they plan to retire in the next one to three years. With the higher levels of dissatisfaction seen in the older age brackets of this survey, this could indicate even larger numbers of defections.

Some results indicate certain positive implications such as 66% (up from 56%) of nurses will continue in their profession for the next 1-3 years. Also, 91% are satisfied overall with their choice of nursing as a career. Nevertheless, 32% of those nurses – if they have their way – will not be working in their current position a year from now.

The following results stand out from the 2012 survey:

- Job satisfaction is on the upswing, but still concerning.
- A significant number plan to retire or scale back hours.
- Many nurses are working due to economic reasons and feel very strongly that healthcare reform does not provide a mechanism that will ensure an adequate supply of qualified nurses.
- Nearly half of nurses worry that their current job negatively impacts their health.
- One in five nurses plans to change employers.
- Almost half of nurses will return to advance their education in nursing.

Seventeen percent surveyed say they will seek a new place of employment as the economy continues to recover.

Comparing responses from the 2011 survey to the 2012, continues to point out that nurses have several areas of dissatisfaction, and that healthcare facilities must continue to refine their nurse recruitment and retention strategies as well as consider alternative staffing options in order to meet their patient care objectives.

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ABOUT AMN HEALTHCARE

Founded in 1985, AMN Healthcare is healthcare's workforce innovator, providing a broad spectrum of workforce solutions and staffing services to the nation's healthcare facilities. AMN's workforce solutions—including managed services programs, recruitment process outsourcing and consulting services—enable providers to successfully reduce complexity, increase efficiency and improve patient outcomes within the rapidly evolving healthcare environment. AMN provides unparalleled access to the largest network of clinics and physicians through its innovative recruitment strategies and breadth of career opportunities. Clients include acute-care hospitals, government facilities, community health centers and clinics, physician practice groups and many other healthcare settings.

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For additional information about this survey or other surveys conducted by AMN Healthcare and its family of companies, please contact:

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