

FINGER LAKES WORKFORCE INVESTMENT BOARD

Health Care and Human Services

Data Compendium

May 2008

Health Care and Human Services Regional Skills Alliance

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RESOURCES:

All data sources are referenced.

Bureau of Economic Analysis

Census Bureau

EMSI Economic Modeling Specialist Inc.

Federal Reserve Bank of New York, Buffalo Branch

Finger Lakes Health Systems Agency: Senior Planner- Arthur Streeter

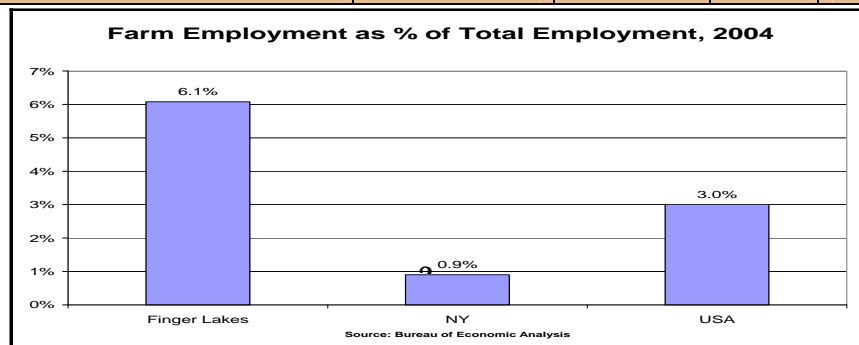
New York State Department of Education

New York State Department: Labor Market Analyst Tammy Marino

Industry Non-Farm Employment by Industry (Finger Lakes –Ontario, Seneca, Yates, and Wayne Counties)

Industry	Finger Lakes	New York	USA	LQ	2008-2013
Agriculture, forestry, fishing and hunting	3.8%	0.5%	0.5%	7.6	-2.3%
Mining	0.2%	0.1%	0.5%	.40	2%
Utilities	0.6%	0.3%	0.4%	1.5	23%
Construction	6.4%	4.8%	5.1%	1.25	9.4%
Manufacturing	12.8%	5.1%	9.9%	1.29	7.6%
Wholesale trade	2.8%	3.5%	4.4%	0.63	11.9%
Retail trade	14.0%	9.6%	11.0%	1.27	7.3%
Transportation and warehousing	2.6%	3.6%	3.3%	0.78	4.8%
Information	1.3%	2.8%	2.2%	0.59	14.8%
Finance and insurance	2.9%	6.7%	4.4%	0.65	18.6%
Real estate and rental and leasing	2.4%	4.4%	1.5%	01.6	13.7%
Professional and technical services	4.4%	9.0%	5.7%	.77	9.6%
Management of companies and enterprises	0.8%	1.2%	1.3%	.61	19%
Administrative and waste services	3.4%	5.0%	5.9%	.57	8.9%
Educational services	2.8%	3.8%	2.3%	1.21	12.6%
Health care and social assistance	10.9%	13.5%	11.4%	.95	8.5%
Arts, entertainment, and recreation	2.4%	2.7%	1.3%	1.84	14%
Accommodation and food services	6.4%	5.5%	8.3%	.77	12.0%
Other services, except public administration	4.1%	4.5%	4.0%	1.02	8.0%
Government	15.0%	13.4%	16.6%	.90	5.9%

EMSI:March 08



Source: Bureau of Economic Analysis

Health care and social assistance Employment and Location Quotient by Subsector

NAICS CODE	Industry	Finger Lakes Employment	% of Total Employment			LQ
			FL	NY	USA	
6243	General medical and surgical hospitals	4237	29.0%	22.2%	3.1%	9.35
6244	Child day care services	1774	12.1%	10.4%	0.6%	20.16
6241	Individual and family services	1,562	10.6%	14%	0.8%	13.25
6211	Offices of physicians	1,357	9.2%	11.4%	1.6%	5.75
6231	Nursing care facilities	990	7.0%	9.2%	1.2%	5.83
6213	Offices of other health practitioners	959	6.5%	5.0%	0.1%	65
6232	Residential mental health/DD facilities	915	6.2%	4.2%	0.4%	15.5
6216	Home health care services	827	5.9%	8.1%	0.7%	8.42
6243	Vocational rehabilitation services	695	4.9%	2.4%	0.3%	16.33
6212	Offices of dentists	495	3.5%	3.8%	0.6%	5.83
6233	Community care facilities for the elderly	280	1.9%	1.7%	0.5%	3.8
6219	Other ambulatory health care services	234	1.6%	1.2%	0.2%	8.0
6214	Outpatient care centers	140	0.9%	2.4%	0.4%	2.25
6242	Emergency and other relief services	107	0.7%	1.2%	0.1%	7.0
6215	Medical and diagnostic laboratories	34	0.2%	0.9%	0.2%	1.0

EMSI:March 08

Finger Lakes Workforce Investment Board

Top Occupations - General medical and surgical hospitals

Occupations	#	Wage	% Growth (08-13)	Educational Attainment Cluster of Occupation Holders
Registered nurses	1,187	\$21.41	14%	Associate's degree
Nursing aides, orderlies, and attendants	330	\$10.87	15%	Postsecondary vocational award
Licensed practical and licensed vocational nurses	184	\$15.56	6%	Postsecondary vocational award
Physicians and surgeons	163	\$68.09	5%	First professional degree
Medical and health services managers	89	\$35.39	7%	Degree plus work experience
Medical and clinical laboratory technologists	83	\$16.47	5%	Associate's degree
Secretaries, except legal, medical, and executive	78	\$11.74	3%	Moderate-term on-the-job training

Source:EMSI

Top Occupations - Child day care services

Occupations	#	Wage	% Growth (08-13)	Educational Attainment Cluster of Occupation Holders
Child care workers	915	\$7.63	-7%	Short-term on-the-job training
Teacher assistants	340	\$10.78	-10%	Short-term on-the-job training
Preschool teachers, except special education	220	\$9.37	-11%	Postsecondary vocational award
Kindergarten teachers, except special education	94	\$22.85	-14%	Bachelor's degree
Elementary school teachers, except special education	39	\$26.54	-15%	Bachelor's degree
Special education teachers, preschool, kindergarten, and elementary school	33	\$31.32	-15%	Bachelor's degree

Source:EMSI

Top Occupations Individual and family services

Occupations	#	Wage	% Growth (08-13)	Educational Attainment Cluster of Occupation Holders
Personal and home care aides	201	\$9.71	18%	Short-term on-the-job training
Teacher assistants	179	\$10.78	9%	Short-term on-the-job training
Home health aides	178	\$11.07	21%	Short-term on-the-job training
Bus drivers, school	160	\$13.64	12%	Short-term on-the-job training
Special education teachers, preschool, kindergarten, and elementary school	76	\$31.32	9%	Bachelor's degree
Social and human service assistants	70	\$12.82	23%	Moderate-term on-the-job training
Social and community service managers	57	\$21.43	9%	Bachelor's degree

Source:EMSI

Top Occupations: Offices of Physicians

Occupations	#	Wage	% Growth (08-13)	Educational Attainment Cluster of Occupation Holders
Physicians and surgeons	452	\$68.09	12%	First professional degree
Registered nurses	114	\$21.41	17%	Associate's degree
Receptionists and information clerks	91	\$9.70	11%	Postsecondary vocational award
Medical secretaries	72	\$13.77	10%	Postsecondary vocational award
Licensed practical and licensed vocational nurses	66	\$15.56	5%	Postsecondary vocational award
Medical assistants	59	\$11.86	19%	Moderate-term on-the-job training
Physician assistants	37	\$30.45	16%	Bachelor's degree

Source:EMSI

Top Occupations: Nursing Care Facilities

Occupations	#	Wage	% Growth (08-13)	Educational Attainment Cluster of Occupation Holders
Nursing aides, orderlies, and attendants	347	\$10.87	-2%	Postsecondary vocational award
Licensed practical and licensed vocational nurses	157	\$15.56	3%	Postsecondary vocational award
Registered nurses	66	\$21.41	3%	Associate's degree
Home health aides	64	\$11.07	-2%	Short-term on-the-job training
Food preparation workers	47	\$8.03	0%	Short-term on-the-job training
Maids and housekeeping cleaners	36	\$7.34	-3%	Short-term on-the-job training
Cooks, institution and cafeteria	27	\$11.59	-4%	Moderate-term on-the-job training

Source:EMSI

Top Occupations: Offices of other Health Practitioners

Occupations	#	Wage	% Growth (08-13)	Educational Attainment Cluster of Occupation Holders
Clinical, counseling, and school psychologists	84	\$22.18	19%	Doctoral degree
Chiropractors	84	\$31.29	15%	First professional degree
Speech-language pathologists	81	\$22.66	15%	Master's degree
Psychologists, all other	81	\$18.51	17%	Master's degree
Industrial-organizational psychologists	80	\$17.72	17%	Master's degree
Physical therapists	70	\$23.88	24%	Master's degree
Health diagnosing and treating practitioners, all other	52	\$27.33	17%	Bachelor's degree

Source: EMSI

Top Occupations: Residential Mental Health/DD facilities

Occupations	#	Wage	% Growth (08-13)	Educational Attainment Cluster of Occupation Holders
Home health aides	248	\$11.07	17%	Short-term on-the-job training
Child care workers	59	\$7.63	17%	Short-term on-the-job training
Social and human service assistants	54	\$12.82	20%	Moderate-term on-the-job training
Personal and home care aides	47	\$9.71	0%	Short-term on-the-job training
Secondary school teachers, except special and vocational education	42	\$36.32	26%	Bachelor's degree
Rehabilitation counselors	39	\$11.82	13%	Master's degree
Nursing aides, orderlies, and attendants	30	\$10.87	7%	Postsecondary vocational award

Source: EMSI

Physician Workforce *

National

- The Health Resources and Services Administration (HRSA) Bureau of Health Professionals estimates that the national demand for physicians will increase 28% by 2020, given changing demographics and projected trends in other factors.^[i]
- This is a baseline estimate. Under other scenarios, such as the emergence of universal healthcare coverage, demand for physicians could increase as much as 40%.

Region

- Applying the National Ambulatory Medical Care Survey (NAMCS) benchmarks by age group to the regional population and assuming use rates will continue to increase as during the 1990s, demand for physician services will rise from 3 million visits in 2000 to 3.5 million visits in 2020.

Nursing Professionals *

National

The Health Resources and Services Administration estimates that 30 states have shortages of registered nurses (RNs) in the year 2000.

- The shortage is projected to intensify over the next two decades with 44 states plus the District of Columbia expected to have RN shortages by the year 2020.
- The U.S. Bureau of Labor Statistics projects that more than one million new and replacement nurses will be needed by 2012.

Region

- The New York State Department of Labor estimates that the Finger Lakes region will see an increase of 1,800 jobs for RNs between 2004-2014.
- The aging of the population is likely to influence the demand for nursing professionals, as the use of both hospitals and nursing homes increase.
- Also important is the mix of RNs, LPNs, and other health care workers such as nursing aides that perform tasks with hospitals, nursing homes, and other health care institution

(*Finger Lakes Health Systems Agency (. 2005). **Assessment of the Current and Projected Physician Supply in the Rochester Region.** Rochester, NY.)

Non-licensed Health Care Workers *

National

- Nationally, there are more than 2.5 million aides and assistants employed in health care.
- More than a million of these workers are in skilled nursing facilities, home health agencies, and other settings.
- In addition, there are many more “gray market,” aides and assistants who work in the homes of individuals who need various levels of care.^[i] As the population ages the need for these workers will increase, but supply is currently limited by poor wages and working conditions which lead to high rates of turnover.^[ii]

Region

- Nursing homes in the Finger Lakes Region reported difficulties in hiring and retaining certified nursing aides in 2006.^[iv]
- Home health agencies also reported difficulties in hiring and retaining home health aides and personal care aides.^[v]
- The state department of labor project annual increases of 270 openings for home health aides and 180 nursing aides and orderlies in the period 2004-2014.^[vi]

(*Finger Lakes Health Systems Agency (. 2005). Assessment of the Current and Projected Physician Supply in the Rochester Region. Rochester, NY.)

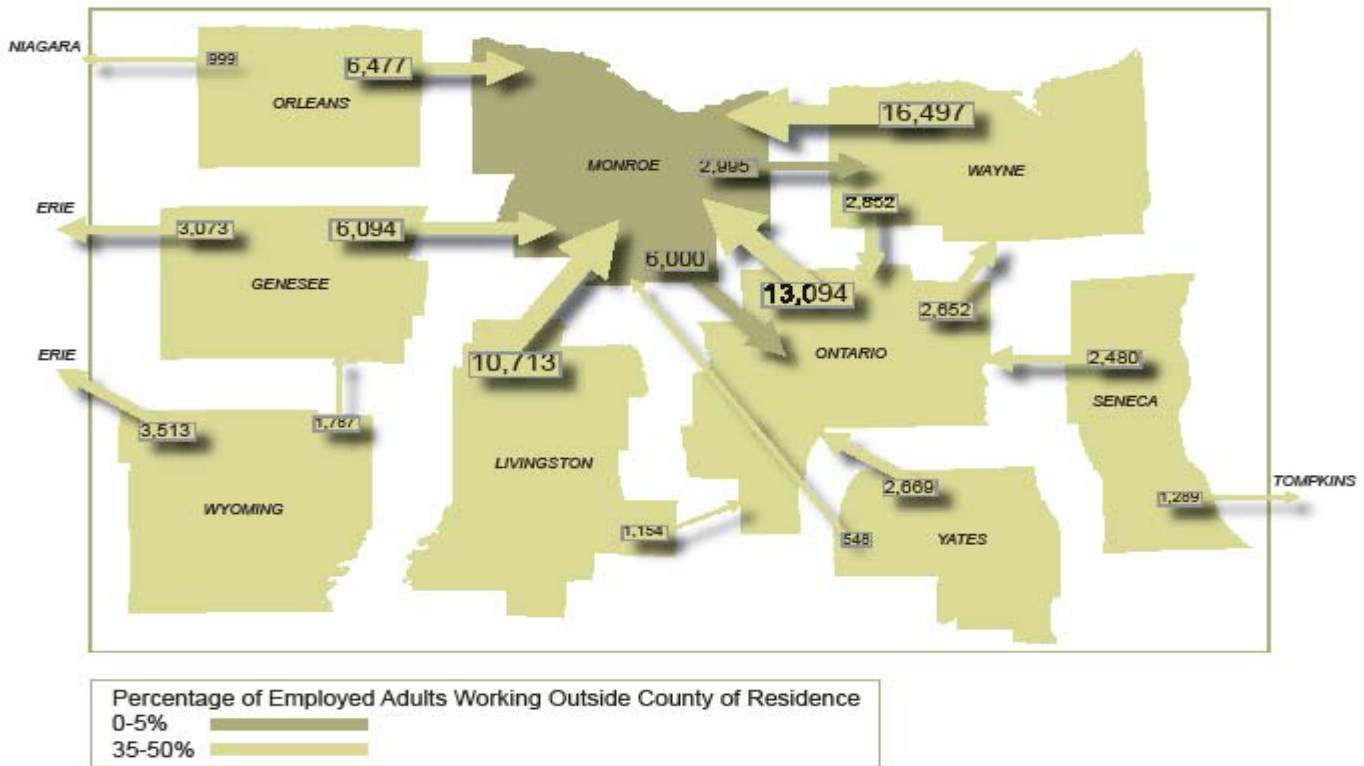
Licensed Nursing Professionals in Finger Lakes Region as of January, 2008

Registered Nurses		Licensed Practical Nurses		Nurse Practitioners	
Area	Number	Area	Number	Area	Number
Region	15,647	Region	6,333	Region	1344
Monroe	8,938	Monroe	3,097	Monroe	933
Ontario	1,567	Wayne	666	Ontario	123
Chemung	1,261	Ontario	659	Chemung	83
Steuben	1,170	Steuben	585	Wayne	62
Wayne	995	Chemung	539	Steuben	56
Livingston	855	Livingston	343	Livingston	37
Seneca	346	Seneca	201	Yates	37
Yates	319	Yates	143	Seneca	8
Schuyler	196	Schuyler	100	Schuyler	5

Factors that will influence whether the supply of nursing professionals remains sufficient in the Region are likely to be the same as those that influence supply nationally, namely wages, hours and working conditions. Our region has 7 baccalaureate nursing programs, and 4 associate degree program. Since the year 2002, the Finger Lakes region has experienced a 70.3% increase in RN graduations. New York State Education Department. Office of the Professions.
<http://www.op.nysed.gov/nurseprogs.htm> (accessed 3/11/08).

Finger Lakes Health Systems Agency

Finger Lakes Commutation Patterns, 2000



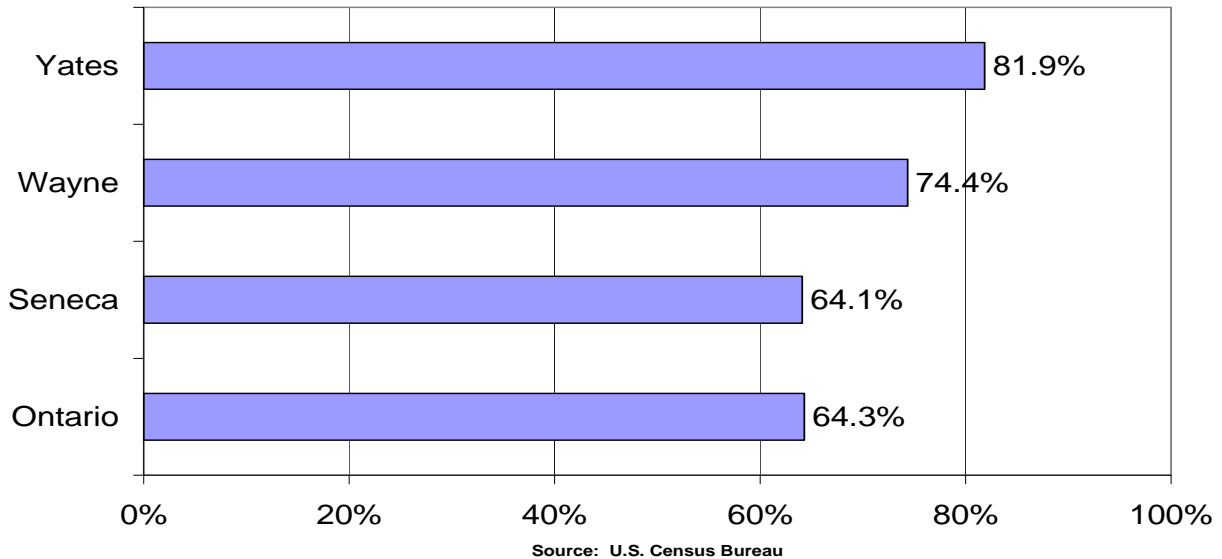
Source: U.S. Census Bureau, 2000 Census
 Compiled by NYS Department of Labor, Division of Research & Statistics

Top 5 Workplace Destinations for County Residents

Ontario			Seneca		
Ontario County, NY	30,893	61.8%	Seneca County, NY	8,140	56.2%
Monroe County, NY	13,094	26.2%	Ontario County, NY	2,480	17.1%
Wayne County, NY	2,652	5.3%	Tompkins County, NY	1,289	8.9%
Seneca County, NY	1,247	2.5%	Wayne County, NY	626	4.3%
Livingston County, NY	623	1.2%	Cayuga County, NY	552	3.8%
<i>Total working in county</i>	<i>48,049</i>		<i>Total working in county</i>	<i>12,818</i>	
<i>Total residing in county</i>	<i>49,951</i>		<i>Total residing in county</i>	<i>14,486</i>	
Wayne			Yates		
Wayne County, NY	23,455	52.4%	Yates County, NY	6,460	59.2%
Monroe County, NY	16,497	36.8%	Ontario County, NY	2,669	24.5%
Ontario County, NY	2,852	6.4%	Monroe County, NY	548	5.0%
Seneca County, NY	455	1.0%	Steuben County, NY	326	3.0%
Onondaga County, NY	384	0.9%	Seneca County, NY	207	1.9%
<i>Total working in county</i>	<i>31,536</i>		<i>Total working in county</i>	<i>7,892</i>	
<i>Total residing in county</i>	<i>44,792</i>		<i>Total residing in county</i>	<i>10,916</i>	

Source: US Census Bureau

% of County Jobs Occupied by Workers Who Live in the County (all industries)



Worker Characteristics (all industries)

Education

- 84% of Finger Lakes population 25 and older have at least a high school diploma (NY state = 79%)
- 20% have a Bachelor's degree (NY state = 27%)

Age

- Percentage of the population of working age was 57.9% in 2000 (NY state = 59.6%)
- Projected to grow slower than state through 2010, then start to decline
- By 2030, down to roughly 50% of population (NY state = 60%)

Source: US Census Bureau

Supply

- Unemployment rate for 4-county region ranges from 4.4 (Yates) to 5.4 (Wayne)

(NY state = 4.6%, data for April, 08) **Source: NY State Department of Labor**

Population trends

- In upstate New York, as in the nation, the share of the population aged 65 and over has been increasing steadily.
- However, upstate New York has been aging faster than the United States and a greater share of its population is elderly.
- Both the U.S. and upstate New York populations will age rapidly as the babyboomers move into elderhood between 2011 and 2029.
- By 2000, the share of the upstate New York population aged 65 and over had risen to 14.4 percent, almost two percentage points higher than that of the nation.

Population Trends Implications:

- A considerable share of services and infrastructure for the elderly, such as supportive housing, special transportation, health care and social services, are provided and funded by local governments and institutions. The number of elderly with special needs is likely to increase over the next few decades.
- With the rise in the average age of the population, there is likely to be an increase in the use of age-related services such as health care and social services, which could stimulate new job opportunities in these areas. Additionally, as a greater percentage of the population retires, a larger demand will emerge for travel, tourism, and other services related to recreation and leisure.

Ageing of Upstate New York July, 2006-Richard Deitz -Federal Reserve Bank of New York, Buffalo Branch