



AMN<sup>®</sup> HEALTHCARE

# CLINICAL WORKFORCE ISSUES: 2009 SURVEY OF HOSPITAL CHIEF EXECUTIVE OFFICERS

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Conducted in Partnership with



COUNCIL ON  
PHYSICIAN AND  
NURSE SUPPLY

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# AMN

## INTRODUCTION

Despite advances in medical technology and the evolution of new delivery models, healthcare is still about people. Physicians, nurses and allied healthcare professionals continue to serve on the front lines of healthcare and are the indispensable providers of patient care. The supply and staffing of clinical healthcare professionals, therefore is a priority for both individual healthcare facilities and for the healthcare system as a whole.

AMN Healthcare, the nation's largest provider of clinical staffing services, is committed to reporting trends in healthcare staffing and to helping ensure that the supply of healthcare professionals is sufficient to meet the nation's needs. As part of this effort, AMN Healthcare conducts annual surveys examining various sectors of the healthcare staffing market, including nurse, physician and allied healthcare professional staffing.

In addition, AMN Healthcare supports the Council on Physician and Nurse Supply, a group of healthcare experts dedicated to finding solutions to the deepening shortage of physicians and nurses. The Council is co-chaired by Richard "Buz" Cooper, M.D. and Linda Aiken, RN, PhD, prominent academics at the University of Pennsylvania.

AMN Healthcare's 2009 Survey of Hospital Chief Executive Officers is the company's first examination of clinical staffing trends from the perspective of hospital administrators. Conducted in partnership with the Council on Physician and Nurse Supply, the survey was sent to the great majority of hospital CEOs in the United States and represents one of the most comprehensive efforts undertaken to reveal the staffing challenges, concerns and priorities facing America's healthcare facility leaders.

The survey reflects how hospital CEOs view the current supply of physicians, nurses and allied healthcare professionals; whether the need for such professionals has fluctuated due to the economic downturn; the vacancy rate of clinical professionals; the extent to which staffing shortages have compromised access to care; and related issues.

Survey results are offered as an informational resource for healthcare industry leaders, policy makers, academics, staffing professionals, journalists and others who follow clinical staffing and supply trends.



## ABOUT AMN HEALTHCARE

AMN Healthcare is the largest healthcare staffing organization in the United States, and the leader in all of its service lines, including temporary nurse staffing, permanent physician search and consulting, temporary physician staffing and permanent and temporary allied healthcare professional staffing. Top brands of AMN Healthcare include American Mobile Healthcare, Merritt Hawkins & Associates, Staff Care, O'Grady Peyton, Med Travelers, NursesRx, Platinum Select, NurseChoice, Medical Express, and RxProHealth. AMN Healthcare is traded on the NYSE under the ticker AHS.

## ABOUT THE COUNCIL ON PHYSICIAN AND NURSE SUPPLY

The Council on Physician and Nurse Supply is an independent, multi-disciplinary group of health care experts dedicated to studying trends in the demand and supply of physicians and nurses and to proposing ways to better align the training capacity of these professionals with the nation's needs. The Council is based at the University of Pennsylvania's Leonard Davis Institute of Health Care Economics. Funding for the Council is provided by AMN Healthcare.

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## METHODOLOGY

AMN's 2009 Survey of Hospital Administrators was mailed to 5,000 hospital administrators nationwide at both for-profit and non-profit acute care facilities, including community hospitals, academic centers, non-government and government facilities.

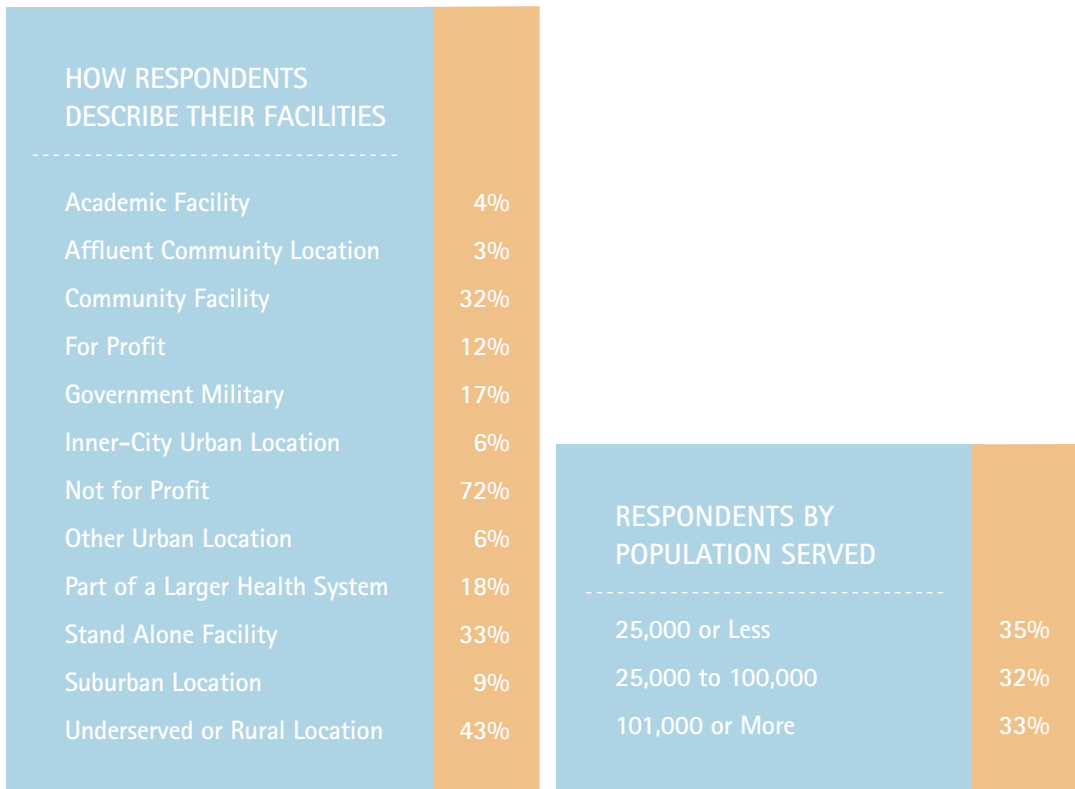
The survey was accompanied by a letter from Council on Physician and Nurse Supply co-chairs Richard "Buz" Cooper, M.D. and Linda Aiken, RN, PhD, explaining the purpose of the survey.

Surveys were mailed in June, 2009 and 284 completed surveys were received by August, 2009. Survey results were released November, 2009.



*AMN Healthcare is  
the largest healthcare  
staffing organization  
in the United States.*

## RESPONDENT TYPES



## ECONOMY AFFECTS CLINICAL STAFFING

AMN Healthcare's 2009 Survey of Hospitals Chief Executive Officers was conducted during a period of economic recession and in the course of national debate over healthcare reform.

The survey reflects how the economic downturn has affected clinical staffing at hospitals and suggests ways in which clinical staffing issues, particularly the shortage of clinical professionals may affect proposals to increase access to healthcare services.

Key findings of the survey follow.

*Most hospital CEOs expect that recruitment of clinical professionals to their facilities will increase in the next six months or stay the same.*

## KEY FINDINGS OF THE SURVEY

- Most CEOs believe there is a shortage of healthcare professionals in the United States. 95% believe there is a shortage of physicians, 91% believe there is a shortage of nurses, 79% believe there is a shortage of allied healthcare professionals and 86% believe there is a shortage of pharmacists.
- Hospital CEOs believe there are not enough physicians or nurses in their service areas to cope with the increased demand for medical services that universal access would create.
- 95% of hospital CEOs said the physician shortage has worsened in the last six months or has gotten no better. By contrast, 27% of CEOs said the nurse shortage has improved in the last six months.
- Despite the recession, the number of clinical professionals employed at hospitals has mostly increased in the last six months or stayed the same.
- Despite economic conditions, CEOs expect that recruitment of clinical professionals to their facilities will increase in the next six months or stay the same.
- Most hospital CEOs said that recruiting clinical professionals remains difficult.
- Hospital CEOs continue to report clinical staff vacancies. CEOs reported average vacancy rates of 11% for physicians, 6% for nurses, 5% for allied professionals, and 5% for pharmacists.
- 46% of CEOs said access to care in their service areas has been compromised by a shortage of physicians, 8% said access has been comprised by a shortage of nurses, 10% said access has been comprised by a shortage of allied professionals, and 3% said access has been compromised by a shortage of pharmacists.
- The majority of CEOs see clinical professionals as important drivers of revenue to their facilities.
- Financial concerns are of the most strategic importance to CEOs. 81% of CEOs rated reimbursement as an important strategy priority, followed by 65% who rated quality of care as important, 50% who rate margin compression as a top priority.



*CEOs don't believe there are enough healthcare professionals to cope with increased demand that universal access would create.*

## TRENDS AND OBSERVATIONS

AMN Healthcare's 2009 Survey of Hospital CEOs was conducted to explore clinical staffing trends at the nation's hospitals and to understand these trends in the context of the current economic recession and the national debate over healthcare reform.

Responses to the survey indicate that several long-standing clinical staffing patterns have not been altered by the recession. In other cases, established patterns have been changed, at least temporarily. Survey responses also suggest that clinical staffing shortages could impede efforts to expand healthcare access to millions of people who currently lack coverage.

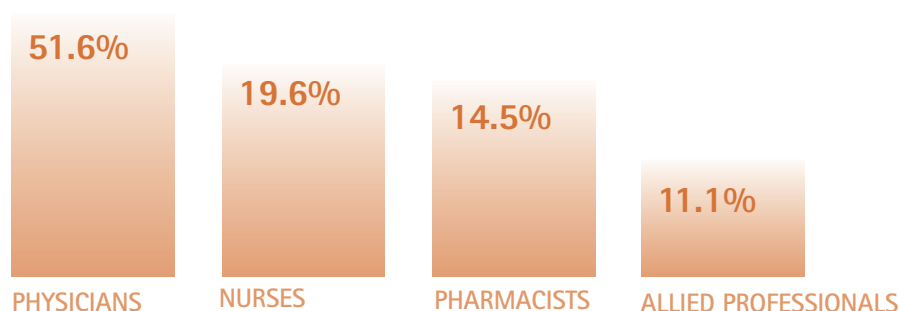
### Shortages Persist

While the recession has temporarily created more applicants than openings in many job sectors, the survey indicates that clinical healthcare professionals remain in short supply. Ninety-five percent of hospital CEOs surveyed said they believe there is a shortage of physicians in the United States. Fifty-four percent see a "serious" shortage of physicians, while 41% view the shortage as "moderate." Over 91% believe there is a shortage of nurses in the U.S. Thirty-eight percent see the shortage as "serious," while 53% view the shortage as "moderate." Seventy-nine percent believe there is a shortage of allied healthcare professionals. Over 60% see the shortage as "moderate," however, while 19% see the shortage as "serious." Eighty-six percent of hospital CEOs see a shortage of pharmacists. Forty-percent see the shortage as "serious" while 46% see the shortage as moderate.



*Responses to the survey indicate that several long-standing clinical staffing patterns have not been altered by the recession.*

## CEOs RANKING SHORTAGES AS A “SERIOUS CONCERN” IN THEIR COMMUNITIES



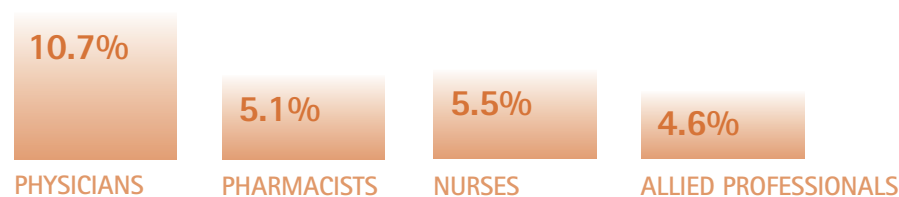
Some CEOs see a temporary change in clinical staffing shortages over the last six months. Over one-quarter (27%) indicated the shortage of nurses improved over the last six months, compared to only 13% who said it had worsened, while 60% said there was no change. By contrast, 37% of CEOs said the physician shortage worsened over the last six months, compared to only 5% who said it had improved, while 58% saw no change. The assessment of allied professional and pharmacist shortages was more mixed, with about three quarters of CEOs indicating there had been no change.

### Growth in Positions

Despite the recession, more CEOs reported that the number of clinical professionals at their facilities increased over the last six months than reported the number of such professionals had decreased. Over one-third (34%) of CEOs said their facilities had added physicians in the last six months, while only 13% said they had lost physicians. The remainder (53%) said the number of physicians at their facilities had not changed. Similarly, 32% of CEOs said they gained nurses in the last six months, only 10% said they lost nurses, and 58% reported no change. Eighteen percent said they gained allied healthcare professionals, 13% said they lost allied professionals, and 69% reported no change. Eleven percent of CEOs said they gained pharmacists, 7% said they lost pharmacists, and 82% reported no change.

CEO's reported vacancy rates of about 5% for most clinical professionals at their facilities, with the exception of physicians, for whom the average vacancy rate is nearly 11%. Over the last six months, CEOs indicated that vacancy rates for physicians had increased more than they had decreased. Over 22% of CEOs said physician vacancy rates had increased over the last six months, while 14% said they had decreased. The remaining 64% noted no change.

## CLINICAL PROFESSIONAL VACANCY RATE



By contrast, only 10% of CEOs said vacancy rates for nurses had increased in the last six months, while 36% said they had decreased, and the remaining 54% said they had not changed. Vacancy rates for allied healthcare professionals and pharmacists also decreased more than increased in the last six months, the survey indicates. Nine percent of CEOs said vacancy rates for allied professionals had increased, while 21% said they had decreased, and the remaining 70% said they had not changed. Only 4 percent of CEOs said vacancy rates for pharmacists had increased, while 19% said they had decreased and the remaining 77% said they had not changed.

While staffing shortages persist, the survey indicates that some hospitals have been able to add clinical professionals to their staffs and decrease vacancy rates during the last six months of a recessionary economy, particularly in nursing. This expansion in available nurse supply is a well-known dynamic during economic downturns. When the stock market falls, many retired nurses temporarily re-enter the workforce to rebuild their nest-egg. And when general unemployment is high many part-time nurses increase their hours to full-time to help pay the bills. Of all clinical professionals, the survey suggests that physicians appear to be in the shortest supply, and the recession has done less to ease the shortage of physicians than it has the shortage of other types of clinical professionals.

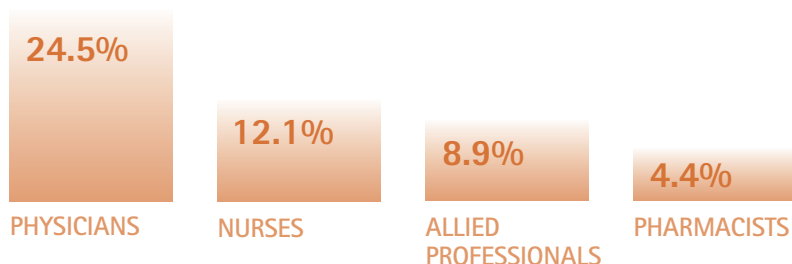
### Recruiting to Increase

Despite the recession, more CEOs said they plan to increase recruitment of clinical professionals to their hospitals in the next six months than said they plan to decrease recruitment of clinical professionals. Fifty-four percent said they plan to increase recruitment of physicians, while only about 7% said they plan to decrease physician recruitment, and 38% plan no change. Twenty-two percent plan to increase nurse recruitment, 11% plan to decrease nurse recruitment, and 67% plan no change. Fifteen percent plan to increase recruitment of allied healthcare professionals, 9% plan to decrease recruitment, and 76% plan no change. About 10% plan to increase pharmacist recruitment, 8% plan to decrease recruitment, and 83% plan no change.

The economic downturn has actually spurred recruitment of physicians, some CEOs indicated. Twenty-five percent of CEOs said the downturn had caused them to increase physician recruiting efforts, compared to only 8% who said the downturn caused them to decrease physician recruiting efforts, while 67% said their physician recruiting efforts were unchanged by the downturn.

By contrast, only 12% of CEOs indicated the downturn had caused them to increase nurse recruiting efforts, while 24% said it had caused them to decrease such efforts, and 64% said their efforts were unchanged. Similarly, only 9% of CEOs said the downturn had caused them to increase recruitment of allied healthcare professionals, while 16% said it caused them to decrease such efforts, and 75% said their efforts were unchanged. Only 4% said the downturn caused them to recruit more pharmacists, while 10% said it caused them to decrease pharmacists recruiting, and 85% said pharmacist recruiting was unchanged.

### HOSPITALS THAT INCREASED RECRUITING IN RESPONSE TO THE DOWNTURN

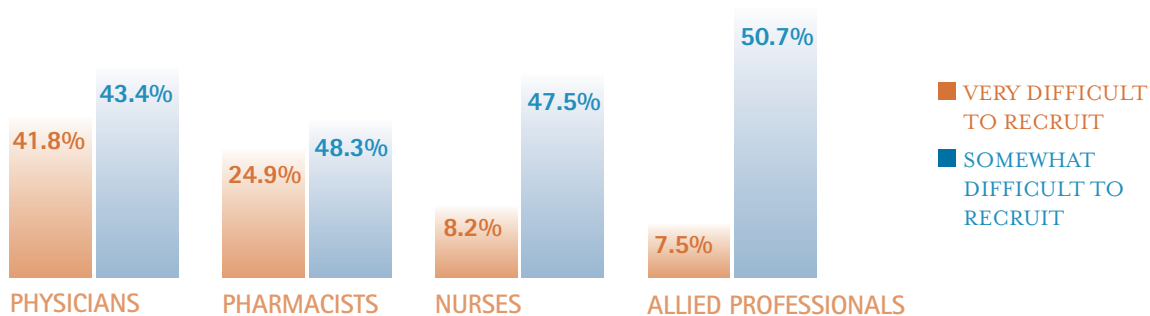


## Recruiting Difficulties

Close to one-third (31%) of CEOs indicated that physicians have become more difficult to recruit in the last six months, compared to 14% who said recruiting physicians has become easier. Similarly, more CEOs (14%) said pharmacists have become more difficult to recruit in the last six months than said they have become easier to recruit (12%). By contrast, only 11% of CEOs said that nurses have become more difficult to recruit in the last six months, while 37% said they have become easier to recruit. Only 13% of CEOs said allied healthcare professionals had become more difficult to recruit in the last six months while 20% said they had become easier to recruit.

While the majority of CEOs indicated that recruiting healthcare professionals is difficult, the bar appears to be set highest in physician recruiting. Over 41% of CEOs said recruiting physicians is “very difficult.” By contrast, only 8% of CEOs said recruiting nurses was “very difficult,” and only about 7% of CEOs said recruiting allied professionals is “very difficult.”

### DIFFICULT TO RECRUIT



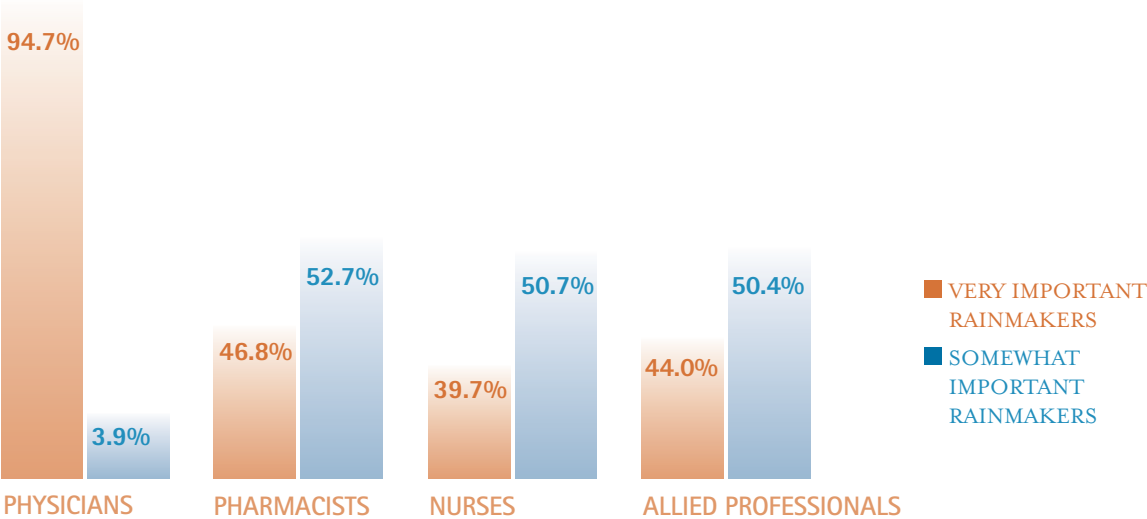
## Clinical Professionals as “Rainmakers”

Clinical professionals can act as revenue drivers for hospitals in a number of ways. Physicians play a key role in driving revenue by admitting patients to hospitals, ordering tests, improving patient outcomes, and performing procedures. Nurses and allied professionals can enhance revenue by keeping beds open, performing tests, and reducing so-called “never events.” In addition, nurses and allied professionals can enhance revenue by helping hospitals perform well on quality and patient satisfaction metrics that are increasingly important under emerging pay-for-performance reimbursement models.

The majority of CEOs surveyed view clinical professionals as important revenue drivers for their hospitals. Ninety-nine percent of CEOs rated physicians as important revenue drivers for their hospitals, 90% rated nurses as important revenue drivers, 91% rated allied professionals as important revenue drivers, and 83.1% rated pharmacists as important revenue drivers.

Of all clinical professionals, physicians are seen as the most important hospital “rainmakers,” the survey indicates.

**IMPORTANT AS "RAINMAKERS"**

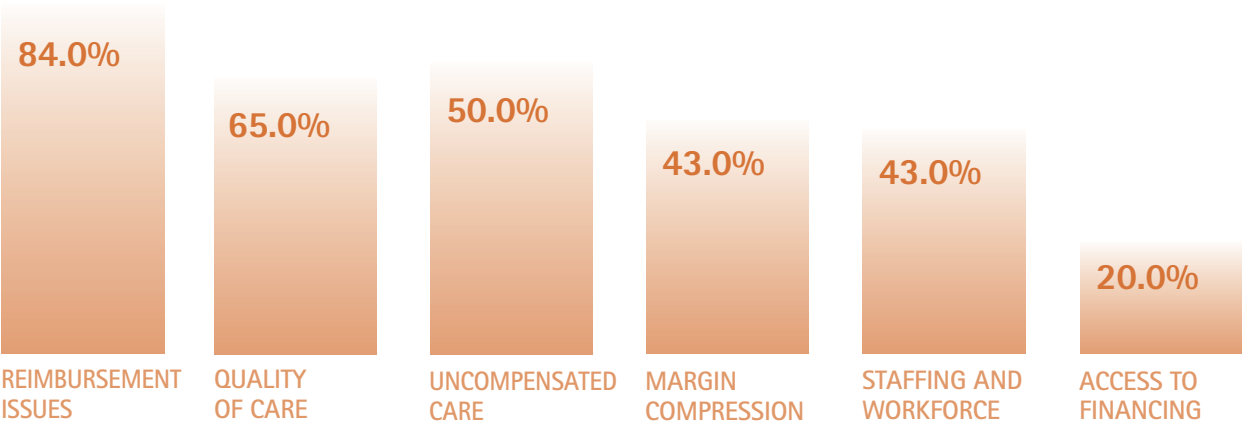


**Strategic Priorities**

Though the healthcare industry has traditionally been thought of as “recession-proof”, that has proven not to be the case during the current economic downturn. Admissions and procedures are down at many hospitals, as a growing number of unemployed workers lose their health insurance and as other insured patients have difficulty in meeting co-pays and deductibles.

As a result, CEOs are particularly focused on financially related priorities. Three of the top four priorities listed as most important by CEOs have direct financial implications. 84% of CEOs rated “reimbursement” as a most important priority, putting reimbursement at the top of the priority list by a considerable margin. “Quality of care,” an issue not directly related to finances (though clearly indirectly related) ranked second, rated by 65% of CEOs as a most important priority. “Uncompensated care” ranked third, was identified by 50% of CEOs as a most important priority, while margin “compression,” another financial issue, was rated fourth and identified by 43% of CEOs as a most important priority. “Staffing” was rated as a most important issue by virtually 43% of CEOs, while “access to financing” was rated as a most important priority by 20% of CEOs.

**CEO’S RANK STRATEGIC PRIORITIES**



While staffing has important financial implications for hospitals, as the survey indicates, during a time of severe economic recession, the issues with the most direct impact on the bottom line are of the highest priority to many hospital CEOs.

### Impact of Healthcare Reform

CEOs were asked if they thought their service areas had a sufficient number of clinical professionals to handle the increased demand for services that would result if healthcare reform leads to greater access to healthcare coverage. Only 21% indicated their areas had enough physicians to meet increased demand, only 33% said they had enough nurses, only 31% said they had enough allied healthcare professionals and only 30% said they had enough pharmacists.



*Eighty-four percent of CEOs rated “reimbursement” as a most important priority, putting reimbursement at the top of the priority list by a considerable margin.*

# QUESTIONS ASKED AND RESPONSES RECEIVED

## 1) HOW HAS THE NUMBER OF CLINICAL PROFESSIONALS AT YOUR FACILITY CHANGED IN THE LAST SIX MONTHS?

	MORE	FEWER	ABOUT THE SAME
Physicians	34.1%	12.9%	53.0%
Nurses	31.8%	10.2%	58.0%
Allied Professionals	17.8%	12.8%	69.4%
Pharmacists	10.9%	7.2%	81.9%

## 2) HOW DO YOU EXPECT RECRUITMENT OF THE FOLLOWING PROFESSIONALS AT YOUR FACILITY WILL CHANGE IN THE NEXT SIX MONTHS, OR WILL THERE BE NO CHANGE?

	MORE	FEWER	SAME
Physicians	54.4%	7.5%	38.1%
Nurses	22.1%	11.0%	66.9%
Allied Professionals	15.0%	8.6%	76.4%
Pharmacists	9.5%	7.6%	82.9%

## 3) HOW HAS THE CURRENT ECONOMIC DOWNTURN IMPACTED YOUR RECRUITMENT EFFORTS FOR THE FOLLOWING CLINICAL PROFESSIONALS?

	INCREASE	DECREASE	NO CHANGE
Physicians	24.5%	8.3%	67.2%
Nurses	12.1%	24.32%	63.6%
Allied Professionals	8.9%	15.7%	75.4%
Pharmacists	4.4%	10.3%	85.3%

## QUESTIONS ASKED AND RESPONSES RECEIVED

### HOW THE CURRENT ECONOMIC DOWNTURN HAS IMPACTED RECRUITMENT EFFORTS BY POPULATION SERVED

PHYSICIANS	MORE	FEWER	SAME
25,000 or Less	18.7%	6.3%	75.0%
25,001–100,000	31.8%	9.4%	58.7%
101,000 or More	27.5%	9.0%	68.5%

NURSES	MORE	FEWER	SAME
25,000 or Less	11.5%	15.6%	72.9%
25,001–100,000	6.9%	39.9%	63.2%
101,000 or More	16.7%	28.9%	54.4%

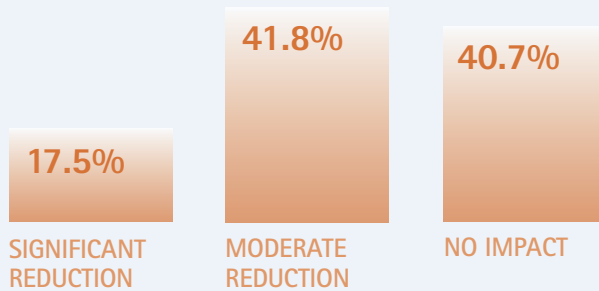
ALLIED PROFESSIONALS	MORE	FEWER	SAME
25,000 or Less	9.3%	8.2%	82.5%
25,001–100,000	8.0%	20.7%	71.3%
101,000 or More	7.8%	17.8%	74.4%

PHARMACISTS	MORE	FEWER	SAME
25,000 or Less	3.2%	4.3%	92.5%
25,001–100,000	3.5%	15.3%	81.2%
101,000 or More	5.6%	11.2%	83.1%

*Ninety-five percent of hospital CEOs surveyed said they believe there is a shortage of physicians in the United States.*

## QUESTIONS ASKED AND RESPONSES RECEIVED

### 4) HOW HAVE RECENT TRENDS CONSTRICTING CAPITAL FINANCE IMPACTED YOUR OPERATING AND STAFFING BUDGETS?



### 5) HOW DIFFICULT IS IT CURRENTLY TO RECRUIT THE FOLLOWING CLINICAL HEALTHCARE PROFESSIONALS TO YOUR FACILITY?

	VERY EASY	SOMEWHAT EASY	SOMEWHAT DIFFICULT	VERY DIFFICULT
Physicians	1.4%	14.0%	43.4%	41.2%
Nurses	5.0%	39.3%	47.5%	8.2%
Allied Professionals	4.3%	37.5%	50.7%	7.5%
Pharmacists	2.6%	24.2%	48.3%	24.9%

### LEVEL OF DIFFICULTY BY POPULATION SERVED

PHYSICIANS	VERY EASY	SOMEWHAT EASY	SOMEWHAT DIFFICULT	VERY DIFFICULT
25,000 or Less	1.0%	11.3%	39.2%	48.5%
25,001–100,000	1.2%	3.6%	38.1%	57.1%
101,000 or More	2.2%	25.3%	52.7%	19.8%

NURSES	VERY EASY	SOMEWHAT EASY	SOMEWHAT DIFFICULT	VERY DIFFICULT
25,000 or Less	4.1%	29.2%	52.1%	14.6%
25,001–100,000	2.3%	46.5%	47.7%	3.5%
101,000 or More	8.8%	42.9%	42.9%	5.5%

## QUESTIONS ASKED AND RESPONSES RECEIVED

ALLIED PROFESSIONALS	VERY EASY	SOMEWHAT EASY	SOMEWHAT DIFFICULT	VERY DIFFICULT
25,000 or Less	3.1%	21.1%	64.2%	11.6%
25,001–100,000	1.2%	50.0%	45.3%	3.5%
101,000 or More	8.7%	42.4%	42.4%	6.5%

PHARMACISTS	VERY EASY	SOMEWHAT EASY	SOMEWHAT DIFFICULT	VERY DIFFICULT
25,000 or Less	1.1%	19.8%	47.3%	31.9%
25,001–100,000	1.2%	22.9%	49.4%	26.5%
101,000 or More	5.5%	30.3%	46.1%	18.0%

### 6) HAS IT BECOME EASIER OR MORE DIFFICULT TO RECRUIT THESE PROFESSIONALS IN THE LAST SIX MONTHS, OR HAS THERE BEEN NO CHANGE?

	EASIER	MORE DIFFICULT	NO CHANGE
Physicians	13.5%	31.4%	55.1%
Nurses	36.5%	10.8%	52.7%
Allied Professionals	19.6%	13.0%	67.4%
Pharmacists	11.9%	14.1%	74.0%

### 7) WHAT IS THE CURRENT VACANCY RATE AT YOUR FACILITY FOR THE FOLLOWING CLINICAL PROFESSIONALS?

	ALL	26 BEDS	26–100 BEDS	100 BEDS
Physicians	10.7%	15.5%	10.3%	7.3%
Nurses	5.5%	5.7%	5.2%	5.8%
Allied Professionals	4.6%	5.3%	3.8%	4.8%
Pharmacists	5.1%	4.6%	5.4%	5.1%

## QUESTIONS ASKED AND RESPONSES RECEIVED

### 8) HOW HAS YOUR VACANCY RATE FOR THESE PROFESSIONALS CHANGED OVER THE LAST SIX MONTHS, OR HAS THERE BEEN NO CHANGE?

	INCREASE	DECREASE	NO CHANGE
Physicians	22.3%	14.0%	63.7%
Nurses	9.7%	36.0%	54.3%
Allied Professionals	9.0%	21.0%	70.0%
Pharmacists	4.2%	19.2%	76.6%

### 9) HOW IMPORTANT ARE THE FOLLOWING CLINICAL PROFESSIONALS AS REVENUE DRIVERS FOR YOUR FACILITY?

	NOT IMPORTANT	SOMEWHAT IMPORTANT	VERY IMPORTANT
Physicians	1.4%	3.9%	94.7%
Nurses	9.6%	50.7%	39.7%
Allied Professionals	9.2%	44.0%	46.8%
Pharmacists	16.8%	52.8%	30.4%

### 10) TO WHAT DEGREE DO YOU THINK THERE IS A SHORTAGE OF ANY OF THE FOLLOWING CLINICAL PROFESSIONALS IN THE UNITED STATES?

	SERIOUS SHORTAGE	MODERATE SHORTAGE	NO SHORTAGE	UNSURE
Physicians	53.8%	41.2%	3.2%	1.8%
Nurses	37.9%	53.6%	7.4%	1.1%
Allied Professionals	18.6%	60.4%	18.5%	2.5%
Pharmacists	39.5%	46.4%	9.0%	5.1%

## QUESTIONS ASKED AND RESPONSES RECEIVED

11) HAS THE SHORTAGE OF THESE PROFESSIONALS IMPROVED OR WORSENERD IN THE LAST SIX MONTHS, OR HAS THERE BEEN NO CHANGE?

	IMPROVED	WORSENERD	NO CHANGE
Physicians	5.2%	36.8%	58.0%
Nurses	27.1%	13.4%	59.5%
Allied Professionals	13.5%	13.5%	73.0%
Pharmacists	9.9%	14.5%	75.6%

12) TO WHAT DEGREE IS THE SHORTAGE OF CLINICAL PROFESSIONALS A CONCERN TO YOUR FACILITY AND THE COMMUNITY IT SERVES, OR IS THERE NO SHORTAGE IN YOUR AREA?

	SERIOUS CONCERN	MODERATE CONCERN	NO CONCERN	NO SHORTAGE
Physicians	51.6%	38.4%	7.1%	2.9%
Nurses	19.6%	51.6%	23.8%	5.0%
Allied Professionals	11.1%	55.7%	28.9%	4.3%
Pharmacists	14.5%	50.5%	30.5%	4.4%

13) HAS ACCESS TO CARE IN YOUR SERVICE AREA BEEN COMPROMISED DUE TO THE SHORTAGE OF THE FOLLOWING PROFESSIONALS?

	YES	NO	UNSURE
Physicians	45.5%	51.6%	2.9%
Nurses	7.8%	88.3%	3.9%
Allied Professionals	10.3%	84.7%	5.0%
Pharmacists	3.3%	89.5%	7.2%

## QUESTIONS ASKED AND RESPONSES RECEIVED

14) HAS THE QUALITY OF CARE IN YOUR SERVICE AREA BEEN COMPROMISED DUE TO THE SHORTAGE OF THE FOLLOWING PROFESSIONALS?

	YES	NO	UNSURE
Physicians	18.9%	73.9%	7.2%
Nurses	10.7%	83.3%	6.0%
Allied Professionals	5.3%	88.3%	6.4%
Pharmacists	4.8%	88.3%	6.9%

15) HOW DIFFICULT DO YOU FEEL IT IS TO RECRUIT HEALTHCARE PROFESSIONALS TO FACILITIES IN THE FOLLOWING TYPES OF LOCATIONS?

	VERY DIFFICULT	SOMEWHAT DIFFICULT	SOMEWHAT EASY	VERY EASY
Inner City	45.1%	44.4%	8.6%	1.9%
Other Urban	6.0%	41.7%	48.9%	3.4%
Affluent Areas	2.2%	8.2%	53.6%	36.0%
Underserved/Rural	81.1%	17.8%	0.7%	0.4%

16) PRESIDENT OBAMA'S ADMINISTRATION IS WORKING TOWARD HEALTHCARE REFORM. DOES YOUR SERVICE AREA HAVE ENOUGH CLINICAL PROFESSIONALS TO MEET INCREASED DEMAND FOR SERVICES SHOULD ACCESS TO HEALTHCARE BECOME UNIVERSAL?

	YES	NO	UNSURE
Physicians	21.7%	69.6%	8.7%
Nurses	33.1%	50.7%	16.2%
Allied Professionals	30.7%	48.4%	20.9%
Pharmacists	29.9%	45.4%	24.7%

## QUESTIONS ASKED AND RESPONSES RECEIVED

### 17) RANK THE FOLLOWING ISSUES IN THE ORDER OF STRATEGIC IMPORTANCE FOR YOUR HEALTHCARE ORGANIZATION (1= MOST IMPORTANT, 6= LEAST IMPORTANT)

STAFFING ISSUES	ALL	QUALITY OF CARE	ALL
Most Important	9.1%	Most Important	35.6%
2nd Most Important	14.8%	2nd Most Important	15.5%
3rd Most Important	18.9%	3rd Most Important	12.9%
4th Most Important	27.3%	4th Most Important	14.4%
5th Most Important	17.8%	5th Most Important	13.3%
Least Important	12.1%	Least Important	8.3%

ACCESS TO FINANCING	ALL	REIMBURSEMENT ISSUES	ALL
Most Important	7.6%	Most Important	33.3%
2nd Most Important	4.9%	2nd Most Important	28.8%
3rd Most Important	7.3%	3rd Most Important	18.9%
4th Most Important	12.5%	4th Most Important	11.4%
5th Most Important	18.3%	5th Most Important	7.2%
Least Important	49.4%	Least Important	0.4%

UNCOMPENSATED CARE	ALL	MARGIN COMPRESSION	ALL
Most Important	7.6%	Most Important	7.3%
2nd Most Important	21.0%	2nd Most Important	15.3%
3rd Most Important	20.0%	3rd Most Important	21.4%
4th Most Important	17.9%	4th Most Important	16.0%
5th Most Important	20.7%	5th Most Important	22.8%
Least Important	12.2%	Least Important	17.2%

*Over the last six months, CEOs indicated that vacancy rates for physicians had increased more than they had decreased.*

QUESTIONS ASKED AND RESPONSES RECEIVED

18) STRATEGIC PRIORITIES IN ORDER OF IMPORTANCE

	MOST IMPORTANT	2ND MOST IMPORTANT	3RD MOST IMPORTANT
Reimbursement Issues	33%	29%	19%
Quality of Care	36%	16%	13%
Uncompensated Care	8%	21%	21%
Margin Compression	7%	15%	21%
Staffing and Workforce	9%	15%	19%
Access to Financing	8%	5%	7%

# AMN

## CONCLUSION

AMN Healthcare's 2009 Survey of Hospital Chief Executive Officers indicates that even in an historic economic downturn, shortages of clinical staffing professionals persist. For some hospitals, the downturn has alleviated the difficulty of recruiting nurses, allied healthcare professionals and pharmacists. Recruiting physicians, however, has generally become more difficult during the downturn. Despite the downturn, more hospital CEOs indicated they plan to increase recruitment of physicians, nurses, allied healthcare professionals and pharmacists in the next six months than indicated they would decrease recruitment of these professionals, while a significant majority said they would not change their recruitment plans. In a signal to healthcare reform planners and policy makers, the majority of CEOs are uncertain whether their service areas have the necessary number of clinical professionals to meet the increased demand for services that would result if access to healthcare is expanded.





## AMN Healthcare Offers Speakers to Address Industry Trends, Staffing, Recruitment, Finance

### TOPICS INCLUDE:

- Physician and Nurse Shortage Issues and Trends
- New Strategies for Healthcare Staffing
- Healthcare Reform Initiatives
- Economic Forecasting for Clinical Staffing
- Allied Staffing Shortages
- Vendor Management
- International Nurse Recruitment and Retention
- Emerging Trends in the Delivery and Financing of Healthcare
- Travel Nurses' Benefit to Magnet Hospitals
- Quality Care and Financial Health
- Recruitment Process Outsourcing
- Other topics upon request

Our speakers all hold advanced degrees and have a combined six decades of staffing experience. Each speaker offers a unique perspective to educate your audience and provide new insights into the trends and future of healthcare staffing.

Learn more about key trends and to help you excel in strategic staffing management through an awareness of the current healthcare landscape. The speakers at AMN Healthcare have diverse expertise in healthcare staffing, recruitment, clinical topics, finance and industry trends, and can offer you the right educational session for your event. Whether your audience wants to learn more about recruitment and retention or is interested in the best ways to find a staffing vendor management company, AMN speakers can offer the latest data and information as well as their expert advice for successful clinical staffing.

For more information or to schedule a speaking engagement, please contact Don Cowan, AMN Healthcare  
[don.cowan@amnhealthcare.com](mailto:don.cowan@amnhealthcare.com) | (866) 756-6635

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For more information about this survey, other surveys conducted by AMN Healthcare companies, or about the Council on Physicians and Nurse Supply, please contact:

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