HEALTH CARE
Industry Cluster Profile

Clustering is a geographic concentration of firms and industries that do business with each other and have common needs for talent, technology, and infrastructure.

Based on labor market information from Tulare, Kings, Kern, and Fresno Counties**

93,671 Jobs
+25.9% Since 2010
$65,805 Median Earnings

Industry Snapshot
Age and Gender

12,350 Unique Job Postings in 2015

Top 5 Occupational Groups
Filters: Median Hourly Earnings or Equal to $16.00, Employed in Industry Group (2015) Greater or Equal to 50

<table>
<thead>
<tr>
<th>Group</th>
<th>Sample Careers</th>
<th>Employed in Industry in 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Practitioners &amp; Technicians</td>
<td>Licensed Health Care Practitioner, LVN, Pharmacy Tech, Registered Nurse</td>
<td>33,018</td>
</tr>
<tr>
<td>Office and Administrative Support</td>
<td>Accounting, Administrative Assistant, Office Supervisors</td>
<td>6,352</td>
</tr>
<tr>
<td>Management</td>
<td>Financial Manager, Health Services Manager</td>
<td>2,863</td>
</tr>
<tr>
<td>Community and Social Service</td>
<td>Mental Health and Substance Abuse Social Worker</td>
<td>2,856</td>
</tr>
<tr>
<td>Healthcare Support</td>
<td>Medical Equipment Preparer, Orderlies, Support Workers</td>
<td>1,317</td>
</tr>
</tbody>
</table>

For more information, refer to the 2015 Tulare County WIB Health Care Staffing Patterns Report.
Postsecondary Training Programs

<table>
<thead>
<tr>
<th>Institution</th>
<th>Program Offered</th>
</tr>
</thead>
<tbody>
<tr>
<td>A.T. Still University in Arizona</td>
<td>Primary Care Physician, Physician Assistant</td>
</tr>
<tr>
<td>Adult Schools (Hanford, Tulare, Porterville, Visalia)</td>
<td>Administrative Medical Assistant, Certified Nursing Assistant, Clinical Medical Assistant, Home Health Aide, Licensed Vocational Nurse, Medical Billing, Phlebotomy, Restorative Nursing Assistant</td>
</tr>
<tr>
<td>Community Colleges (College of the Sequoias, Porterville College, Reedley College, West Hills College)</td>
<td>Administrative Medical Assistant, Certified Nursing Assistant, Clinical Medical Assistant, Dental Assistant, Emergency Medical Technician, EKG/ECG Technician, Health Care Interpreter, Home Health Aide, Licensed Vocational Nurse, Pharmacy Technician, Physical Therapy Assistant, Psychiatric Technician, Registered Nurse, Sterile Processing Technician</td>
</tr>
<tr>
<td>Fresno State University</td>
<td>Medical Business, Occupational Therapy, Physician Assistant, Physical Therapy(B.S., DPT), Public Health, Registered Nursing, Bachelors of Science in Nursing, Nurse Practitioner</td>
</tr>
<tr>
<td>Kaweah Delta Residency Program</td>
<td>Independent Licensed Practitioners</td>
</tr>
<tr>
<td>Lutheran Dental</td>
<td>Dental Practitioners</td>
</tr>
<tr>
<td>Local Private Postsecondary (Brandman University, Career Development Institute, Fresno Pacific University, Milan, San Joaquin Valley College)</td>
<td>Administrative Medical Assistant, Certified Nursing Assistant, Clinical Medical Assistant, Dental Assistant, Dental Hygiene, Health Administration, Licensed Vocational Nurse, Medical Billing, Pre-Physical/Occupational Therapy, Nurse Practitioner, Pharmacy Technician, Pharmacy Technology, Registered Nurse, Respiratory Therapy</td>
</tr>
</tbody>
</table>

Survey results from local health care employers in the Visalia/Tulare area representing 6,165 jobs, 2015

Positions Identified as Most Difficult to Fill

- **Administrative Medical Assistants**
  - Lack of Qualified Candidates
- **Certified Nursing Assistants**
  - High Turnover/Transition to Nursing
- **Department Directors**
  - Requires Experience/Education, Increase in Retirement
- **Dietary Positions**
  - High Turnover
- **Housekeeping**
  - High Turnover
- **Licensed Health Care Practitioner**
  - including Licensed Independent Practitioners (Ex: Dentist, Nurse Practitioner, Pharmacist, Physician, Physician’s Assistant)
  - National & Local Shortage
- **Information Technology Positions**
  - Requires Customer Service Skills, Specialty/Cross Training
- **Medical Assistants**
  - Lack of Qualified Candidates
- **Physical Therapists**
  - Lack of Qualified Candidates
- **Registered Nurses**
  - Requires Experience, High Competition for Qualified Candidates, Requires Specialty Training

Applied Skills Gaps Identified

- **Leadership/Organization Skills**
- **Customer Service**
- **Critical Thinking**
- **Written/Oral Communication**
- **Information Technology**
- **Ethics/Social Responsibility**
- **Creativity/Innovation**

**Notes**
- EMSI data have various sources depending on the class of worker. (1) For QCEW Employees, EMSI primarily uses the QCEW (Quarterly Census of Employment and Wages), with supplemental estimates from County Business Patterns and Current Employment Statistics. (2) Non-QCEW employees data are based on a number of sources including QCEW, Current Employment Statistics, County Business Patterns, BEA State and Local Personal Income reports, the National Industry Occupation Employment Matrix (NIOEM), the American Community Survey, and Railroad Retirement Board statistics. (3) Self-Employed and Extended Proprietor classes of worker data are primarily based on the American Community Survey, Non employer Statistics, and BEA State and Local Personal Income reports. Projections for QCEW and Non-QCEW Employees are informed by NIOEM and long-term industry projections published by individual states.

- **Industry Data**

- **Input-Output Data**
  - The input-output model in this report is EMSI’s gravitational flows multi-regional social account matrix model (MR-SAM). It is based on data from the Census Bureau’s Current Population Survey and American Community Survey; as well as the Bureau of Economic Analysis’ National Income and Product Accounts, Input-Output Make and Use Tables, and Gross State Product data. In addition, several EMSI in-house data sets are used, as well as data from Oak Ridge National Labs on the cost of transportation between counties.

- **Staffing Patterns Data**
  - The staffing pattern data in this report are compiled from several sources using a specialized process. For QCEW and Non-QCEW Employees classes of worker, sources include Occupational Employment Statistics, the National Industry Occupation Employment Matrix, and the American Community Survey. For the Self-Employed and Extended Proprietor classes of worker, the primary source is the American Community Survey, with a small amount of information from Occupational Employment statistics.

- **Infogroup Business-Level Data**
  - Data for individual businesses is provided by Infogroup, which maintains a database of more than 16 million U.S. business entities. Note that in aggregate it will not be consistent with EMSI labor market data due to differences in definitions, methodology, coverage, and industry/geographic classification.

**State Data Sources**
This report uses state data from the following agencies: California Labor Market Information Department