

Labor Market Analysis for Program Modification:
 1202.00/Hospital and Healthcare Administration
 (Healthcare Management Associate of Science)
 (Healthcare Management Certificate of Achievement)
 Orange County Center of Excellence, September 2022



Summary

Program LMI Endorsement	Endorsed: All LMI Criteria Met <input type="checkbox"/>	Endorsed: Some LMI Criteria Met <input checked="" type="checkbox"/>	Not LMI Endorsed <input type="checkbox"/>
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Program LMI Endorsement Criteria

	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>
Supply Gap:	<i>Comments:</i> there is projected to be 924 middle-skill annual job openings throughout Los Angeles and Orange counties for <i>medical transcriptionists</i> , which is more than the 347 awards conferred by educational institutions .	
Living Wage: (Entry-Level, 25 th)	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
	<i>Comments:</i> entry-level hourly earnings for medical transcriptionists are below the OC living wage of \$20.63.	
Education:	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>
	<i>Comments:</i> The typical entry-level education for <i>medical transcriptionists</i> is a postsecondary nondegree award and 49% of workers in the field have completed some college or an associate degree as their highest level of education.	

Emerging Occupation(s)

Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
<i>Comments:</i> N/A	

The Orange County Center of Excellence for Labor Market Research (OC COE) prepared this report to determine whether there is a supply gap in the Los Angeles/Orange County regional labor market related to two healthcare management occupations:

- Middle-Skill
 - Medical Transcriptionists (31-9094)
- Above Middle-Skill – denoted with an asterisk (*) throughout this report.
 - Medical and Health Services Managers (11-9111)*

Middle-skill occupations typically require a community college education while above middle-skill occupations typically require at least a bachelor’s degree.

Based on the available data, there appears to be a supply gap for *medical transcriptionists* in the region and the typical education requirements for this occupation with a community college education. However, entry-level wages are below the living wage. **Therefore, due to some of the regional labor market criteria being met, the COE endorses this proposed program.**

Exhibit 1 lists the occupational demand, supply, typical entry-level education, and educational attainment for the occupations included in this report.

Exhibit 1: Occupational Demand and Supply in Los Angeles/Orange Counties

Occupation (SOC)	Demand (Annual Openings)	Supply (CC and Non-CC)	Entry-Level Hourly Earnings (25 th Percentile)	Typical Entry-Level Education	Community College Educational Attainment
Medical Transcriptionists (31-9094)	924	347	LA: \$17.55 OC: \$17.49	Postsecondary nondegree award	49%
Middle-Skill Total	922	347	N/A	N/A	N/A
Medical and Health Services Managers (11-9111)*	2,122	500	LA: \$35.05 OC: \$35.04	Bachelor's degree	27%
Above Middle-Skill Total	2,122	500	N/A	N/A	N/A
Total	3,046	847	N/A	N/A	N/A

Demand:

- The number of jobs related to *medical transcriptionists* is projected to decrease 8% through 2026; however, there is projected to be 924 annual job openings due to retirements and replacements.
- Hourly entry-level wages for *medical transcriptionists* are \$17.55 in Orange County, which is significantly below the living wage of \$20.63.
- There were 132 online job postings for *medical transcriptionists* over the past 12 months. The highest number of postings were for medical transcriptionists, medical transcribers, and transcriptionists.
- The typical entry-level education for *medical transcriptionists* is a postsecondary nondegree award.
- Approximately 49% of *medical transcriptionists* have completed some college or an associate degree as their highest level of educational attainment.

Supply:

- There was an average of 347 awards conferred by 2 community colleges in Orange County from 2018 to 2021. No awards were conferred by Los Angeles County community colleges.
- Non-community college institutions did not confer any awards related to *medical transcriptionists*. However, 500 awards for *medical and health services managers* were conferred by 16 institutions.
- Orange County community college students that exited healthcare management programs in the 2018-2019 academic year had a median annual wage of \$52,886 after exiting the program.
- There was insufficient data to determine the percentage of students that attained the living wage or were employed in a job closely related to their field of study.

Demand

Occupational Projections:

Exhibit 2 shows the annual percent change in jobs for both healthcare management occupations researched in this report from 2016 through 2026. Notably, employment in these healthcare management occupations in Orange County increased 6% from 2019 to 2020 while employment across all occupations in Los Angeles and Orange Counties declined 7% due to the COVID-19 pandemic. Employment for these occupations increased 27% from 2020 to 2021 in Orange County, which is much higher than all occupations in Los Angeles and Orange Counties (3%).

Employment in both of these healthcare management occupations is projected to continue to increase at a slightly higher rate than all occupations through 2026. However, the above middle-skill occupation *medical and health services managers* is projected to account for all of the increase.

Exhibit 2: Annual Percent Change in Jobs for Healthcare Management Occupations, 2016-2026

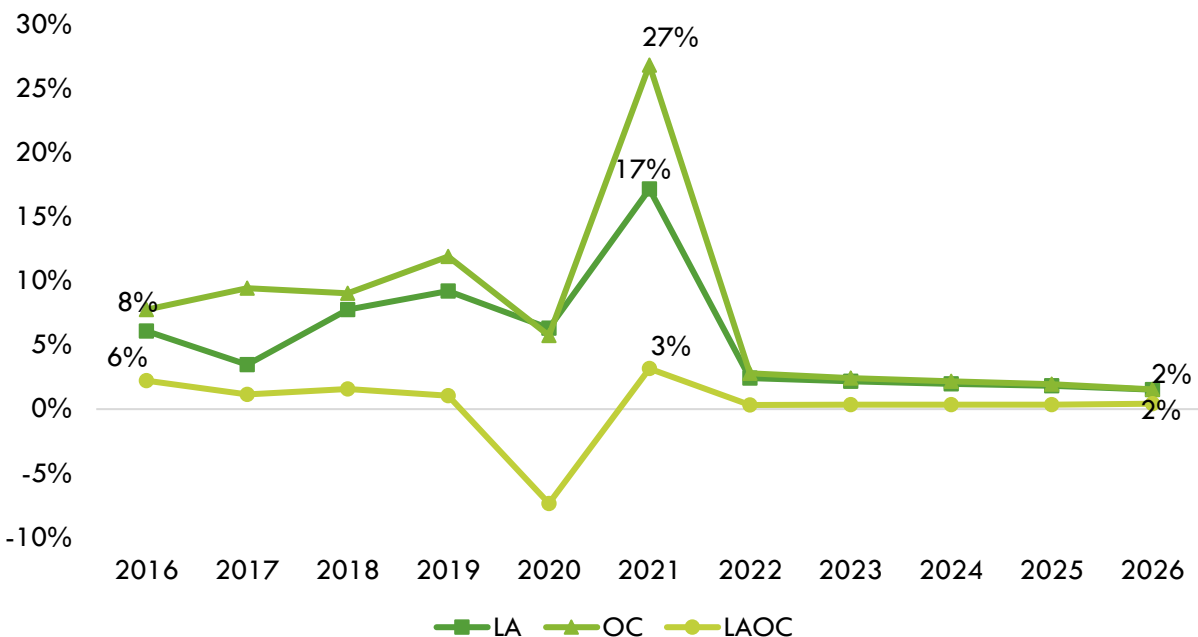


Exhibit 3 shows the five-year occupational demand projections for *medical transcriptionists*, the sole middle-skill occupation in this report. In Los Angeles/Orange County, the number of jobs related to these occupations is projected to decrease 8% through 2026. There is projected to be 924 jobs available annually.

Exhibit 3: Middle-Skill Occupational Demand in Los Angeles and Orange Counties¹

Geography	2021 Jobs	2026 Jobs	2021-2026 Change	2021-2026 % Change	Annual Openings
Los Angeles	4,628	4,125	(503)	(11%)	611
Orange	2,253	2,229	(24)	(1%)	313
Total	6,881	6,354	(527)	(8%)	924

¹ Five-year change represents new job additions to the workforce. Annual openings include new jobs and replacement jobs that result from retirements and separations.

Exhibit 4 shows the five-year occupational demand projections for *medical and health services managers*, the sole above middle-skill occupation in this report. In Los Angeles/Orange County, the number of jobs related to these occupations is projected to increase by 17% through 2026. There is projected to be 2,122 jobs available annually.

Exhibit 4: Above Middle-Skill Occupational Demand in Los Angeles and Orange Counties

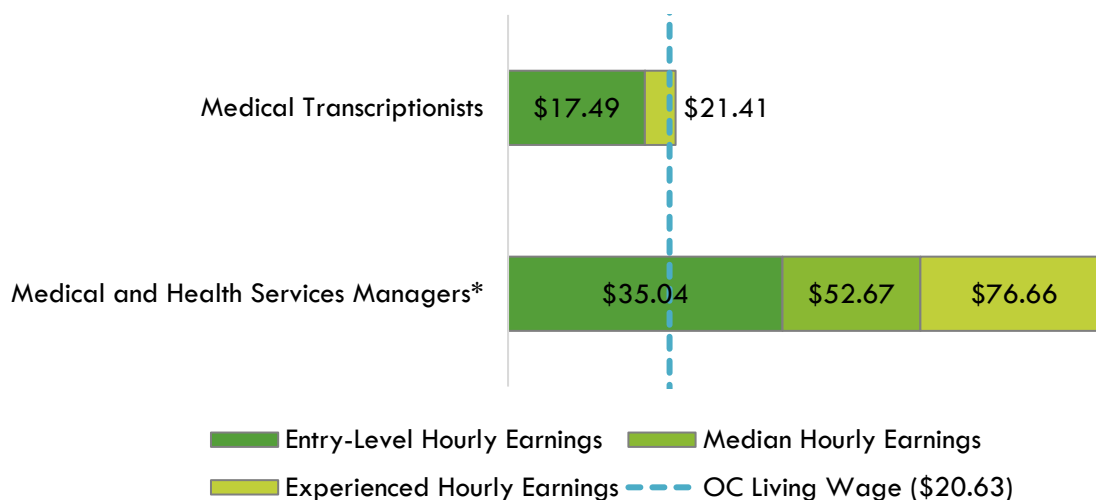
Geography	2021 Jobs	2026 Jobs	2021-2026 Change	2021-2026 % Change	Annual Openings
Los Angeles	13,798	16,195	2,396	17%	1,608
Orange	4,377	5,152	775	18%	514
Total	18,176	21,347	3,171	17%	2,122

Wages:

The labor market endorsement in this report considers the entry-level hourly wages for these middle-skill healthcare management occupations in Orange County as they relate to the county’s living wage. Los Angeles County wages are included below in order to provide a complete analysis of the LA/OC region.

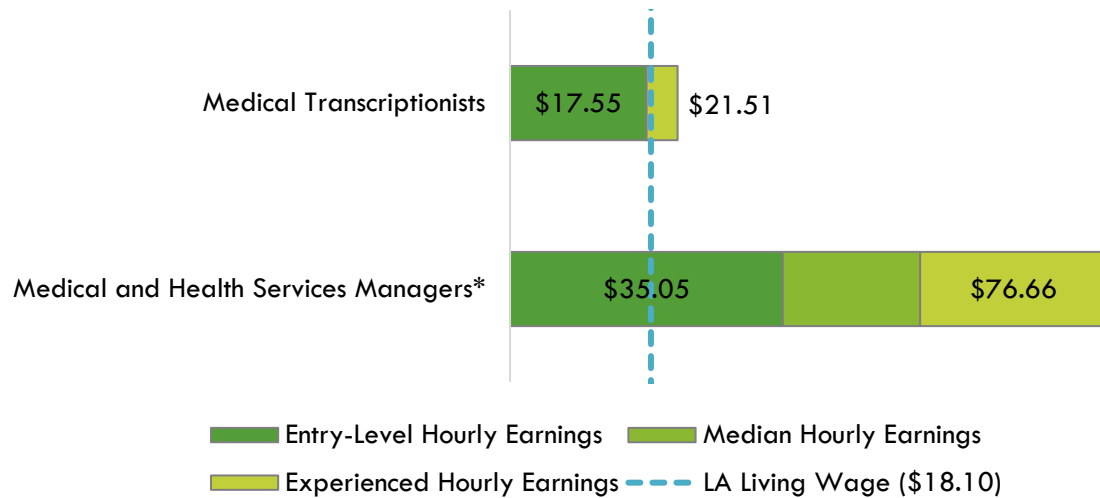
The typical entry-level hourly wages for *medical transcriptionists* are \$17.49, which is significantly below the living wage for one adult (\$20.63 in Orange County). Median wages are identical to entry-level wages. Experienced workers can expect to earn \$21.41, which is higher than the living wage. Orange County’s average wages are higher than the average statewide wage of \$16.75 for this occupation. Exhibit 5 shows the wage range for each of these healthcare management occupations in Orange County and how they compare to the regional living wage, sorted from lowest to highest entry-level wage.

Exhibit 5: Wages by Occupation in Orange County



The typical entry-level hourly wages for *medical transcriptionists* are \$17.55, which is below the living wage for one adult (\$18.10 in Los Angeles County). Median wages are identical to entry-level wages. Experienced workers can expect to earn \$21.51, which is higher than the living wage. Los Angeles County’s average wages are higher than the statewide wage of \$16.75 for this occupations. Exhibit 6 shows the wage range for each of these healthcare management occupations in Los Angeles County and how they compare to the regional living wage, sorted from lowest to highest entry-level wage.

Exhibit 6: Wages by Occupation in Los Angeles County



Job Postings:

There were 25,652 online job postings related to these healthcare management occupations listed in the past 12 months. Of those, 99% (25,520) were for the above middle-skill *medical and health services managers* occupation. Exhibit 7 shows the number of job postings by occupation.

Exhibit 7: Number of Job Postings by Occupation (n=25,652)

Occupation	Job Postings	Percentage of Job Postings
Medical and Health Services Managers*	25,520	99%
Medical Transcriptionists	132	1%
Total Postings	25,652	100%

The top employers for *medical transcriptionists* in the region, by number of job postings, are shown in Exhibit 8.

Exhibit 8: Top Middle-Skill Employers by Number of Job Postings (n=132)

Employer	Job Postings	Percentage of Job Postings
Appen	7	5%
Hallett Emerick Wells & Sareen Plc	4	3%
Huntington Hospital	4	3%
Med-Trans Corporation	4	3%
Citrus Valley Health Partners	3	2%
Cynet Systems	3	2%
Infojini	3	2%
Kelly Services	3	2%
Macksoud & Davis, LLP	3	2%
PIH Health	3	2%

The top employers for the *medical and health services managers* in the region, by number of job postings, are shown in Exhibit 9.

**Exhibit 9: Top Above Middle-Skill Employers by Number of Job Postings
(n=25,520)**

Employer	Job Postings	Percentage of Job Postings
Anthem Blue Cross	1,930	8%
Clinical Management Consultants	542	2%
PIH Health	407	2%
University of California	380	2%
Cedars-Sinai	355	1%
Providence	340	1%
University of Southern California	238	1%
UnitedHealth Group	209	1%
Discovery Behavioral Health	190	1%
Kindred Healthcare	187	1%

The top specialized, soft, and software/computer skills listed by those most frequently mentioned in job postings (denoted in parentheses) are shown for *medical transcriptionists* occupations in Exhibit 10.

**Exhibit 10: Top Skills for Middle-Skill Occupations by Number of Job Postings
(n=12,282)**

Top Specialized Skills	Top Soft Skills	Top Software and Computer Skills
Medical Terminology (57)	Transcribing (115)	Microsoft Outlook (8)
Medical Transcription (57)	Communications (40)	Artificial Intelligence Systems (7)
Medical Records (40)	Typing (26)	Microsoft Excel (5)
Anatomy (29)	Multitasking (22)	Microsoft Office (4)
Physiology (29)	Detail Oriented (21)	Microsoft PowerPoint (3)
Data Entry (25)	Word Processing (18)	Microsoft Word (3)
Pathology (21)	Grammar (17)	Database Software (1)
Audio Control (20)	Strong Work Ethic (16)	Document-Oriented Databases (1)
Data Retrieval (19)	Organizational Skills (14)	Epic EMR (1)
Dictation (18)	Clerical Works (11)	Google Workspace (1)

The top specialized, soft, and software/computer skills listed by those most frequently mentioned in job postings (denoted in parentheses) are shown for *medical and health services managers* in Exhibit 11.

Exhibit 11: Top Skills for Above Middle-Skill Occupations by Number of Job Postings (n=6,375)

Top Specialized Skills	Top Soft Skills	Top Software and Computer Skills
Nursing (5,765)	Management (11,170)	Microsoft Excel (3,000)
Auditing (2,620)	Communications (10,611)	Microsoft Office (2,178)
Marketing (2,290)	Leadership (9,505)	Microsoft PowerPoint (1,767)

Top Specialized Skills	Top Soft Skills	Top Software and Computer Skills
Performance Improvement (1,916)	Operations (8,932)	Microsoft Outlook (1,747)
Case Management (1,899)	Planning (5,151)	Microsoft Word (1,201)
Strategic Planning (1,821)	Customer Service (4,836)	eClinicalWorks (ECW) (543)
Quality Improvement (1,806)	Coordinating (4,414)	Microsoft Access (319)
Billing (1,770)	Problem Solving (3,789)	Google Workspace (189)
Mental Health (1,734)	Microsoft Excel (3,000)	SQL (Programming Language) (156)
Social Work (1,726)	Interpersonal Communications (2,893)	PHP (Scripting Language) (134)

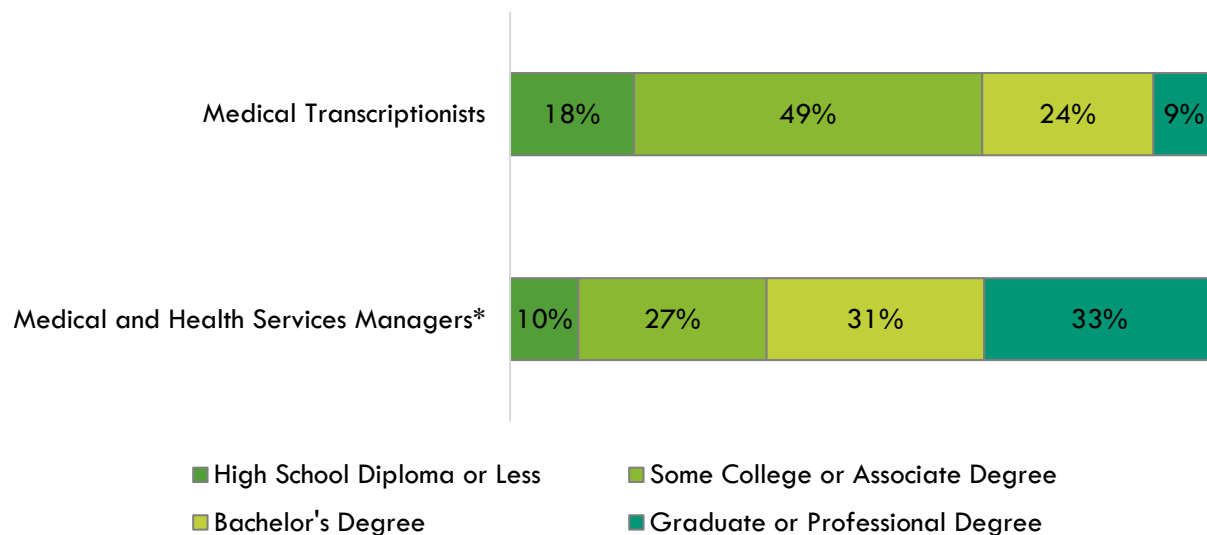
Educational Attainment:

The Bureau of Labor Statistics (BLS) lists a postsecondary nondegree award as the typical entry-level education for *medical transcriptionists* and a bachelor's degree for *medical and health services managers*. The national-level educational attainment data indicates approximately 49% of *medical transcriptionists* have completed some college or an associate degree as their highest level of education. Approximately 27% of *medical and health services managers* have completed some college or an associate degree. Exhibit 12 shows the educational attainment for each occupation, sorted by highest community college educational attainment to lowest.

Of the 53% of the cumulative job postings for *medical transcriptionists* that listed a minimum education requirement in Los Angeles/Orange County, 93% (65) requested a high school diploma or an associate degree and 6% (4) requested a bachelor's degree.

Conversely, of the 67% of the postings for *medical and health services managers* that listed a minimum education requirement, 53% (9,038) requested a bachelor's degree, 27% (4,551) requested a high school diploma or an associate degree, and 20% (3,400) requested a graduate or professional degree.

Exhibit 12: National-level Educational Attainment for Occupations



Educational Supply

Community College Supply:

Exhibit 13 shows the three-year average number of awards conferred by community colleges in the related TOP code: Hospital and Health Care Administration (1202.00). Only two colleges, Cypress, and Golden West, conferred awards in this TOP code between 2018 and 2021. Over the past 12 months, there were no other related program recommendation requests from regional community colleges.

Exhibit 13: Regional Community College Awards (Certificates and Degrees), 2018-2021

TOP Code	Program	College	2018-2019 Awards	2019-2020 Awards	2020-2021 Awards	3-Year Award Average
1202.00	Hospital and Health Care Administration	-	-	-	-	-
		LA Subtotal	-	-	-	-
		Cypress	0	1	0	0
		Golden West	560	295	185	347
		OC Subtotal	560	296	185	347
Supply Total/Average			560	296	185	347

Exhibit 14 shows the annual average community college awards by type from 2018-19 through 2020-21. All awards were for certificates between 6 and less than 18 semester units.

Exhibit 14: Annual Average Community College Awards by Type, 2018-2021



Community College Student Outcomes:

Exhibit 15 shows the Strong Workforce Program (SWP) metrics for healthcare management programs in Coast Community College District (Coast CCD), the Orange County Region, and California. Notably, Coastline College is the only college throughout the state for which student data for TOP code 1202.00 is reported. A review of the Chancellor's Office Curriculum Inventory shows that seven colleges offer courses under TOP code 1202.00. However, all the courses were updated by each college between 2019 and 2022, suggesting that these courses may not have been available during the 2019-2020 academic year.

Due to the small number of students, there is insufficient data to calculate several metrics. However, Coast CCD students had median annual earnings of \$52,886 after exiting the program.

Exhibit 15: Hospital and Healthcare Administration (1202.00) Strong Workforce Program Metrics, 2019-20²

SWP Metric	Coast CCD	OC Region	California
SWP Students	65	Same as Coast CCD	Same as Coast CCD
SWP Students Who Earned 9 or More Career Education Units in the District in a Single Year	25%	Same as Coast CCD	Same as Coast CCD
SWP Students Who Completed a Noncredit CTE or Workforce Preparation Course	Insufficient Data	Same as Coast CCD	Same as Coast CCD
SWP Students Who Earned a Degree or Certificate or Attained Apprenticeship Journey Status	Insufficient Data	Same as Coast CCD	Same as Coast CCD
SWP Students Who Transferred to a Four-Year Postsecondary Institution (2018-19)	Insufficient Data	Same as Coast CCD	Same as Coast CCD
SWP Students with a Job Closely Related to Their Field of Study (2017-18)	Insufficient Data	Same as Coast CCD	Same as Coast CCD
Median Annual Earnings for SWP Exiting Students (2018-19)	\$52,866	Same as Coast CCD	Same as Coast CCD
Median Change in Earnings for SWP Exiting Students (2018-19)	Insufficient Data	Same as Coast CCD	Same as Coast CCD
SWP Exiting Students Who Attained the Living Wage (2018-19)	Insufficient Data	Same as Coast CCD	Same as Coast CCD

Non-Community College Supply:

For a comprehensive regional supply analysis, it is also important to consider the supply from other institutions in the region that provide training programs for these healthcare management occupations. Exhibit 16 shows the annual and three-year average number of awards conferred by these institutions in the related Classification of Instructional Programs (CIP) Codes: Health/Health Care Administration/Management (51.0701) and Hospital and Health Care Facilities Administration/Management (51.0702)

Due to different data collection periods, the most recent three-year period of available data is from 2017 to 2020. Between 2017 and 2020, eight colleges in the region conferred an average of 762 awards annually in related training programs.

Exhibit 16: Regional Non-Community College Awards, 2017-2020

CIP Code	Program	College	2017-2018 Awards	2018-2019 Awards	2019-2020 Awards	3-Year Award Average
51.0701	Health/Health Care Administration/Management	Advanced College	0	1	0	0
		Angeles College	7	0	0	2
		ATI College-Norwalk	0	0	0	0
		California Intercontinental University	0	0	1	0

² All SWP metrics are for 2019-20 unless otherwise noted.

CIP Code	Program	College	2017-2018 Awards	2018-2019 Awards	2019-2020 Awards	3-Year Award Average
		California State University-Long Beach	217	203	186	202
		California State University-Northridge	263	240	195	233
		Concordia University-Irvine	11	12	6	10
		Healthcare Career College	0	0	5	2
		Pacific College	0	9	8	6
		Platt College-Anaheim	0	0	4	1
		Platt College-Los Angeles	25	21	10	19
		Stanbridge University	0	0	0	0
		University of Antelope Valley	19	8	13	13
		University of La Verne	17	7	8	11
Supply Subtotal/Average			559	501	436	499
51.0702	Hospital and Health Care Facilities Administration/Management	Trident University International	0	3	0	1
Supply Subtotal/Average			0	3	0	1
Supply Subtotal/Average			559	504	436	500

Regional Demographics

This section analyzes demographic data for Orange County community college students enrolled in healthcare management programs compared to the OC population, as well occupational data, for the purpose of identifying potential diversity and equity issues that can be addressed by community college programs.

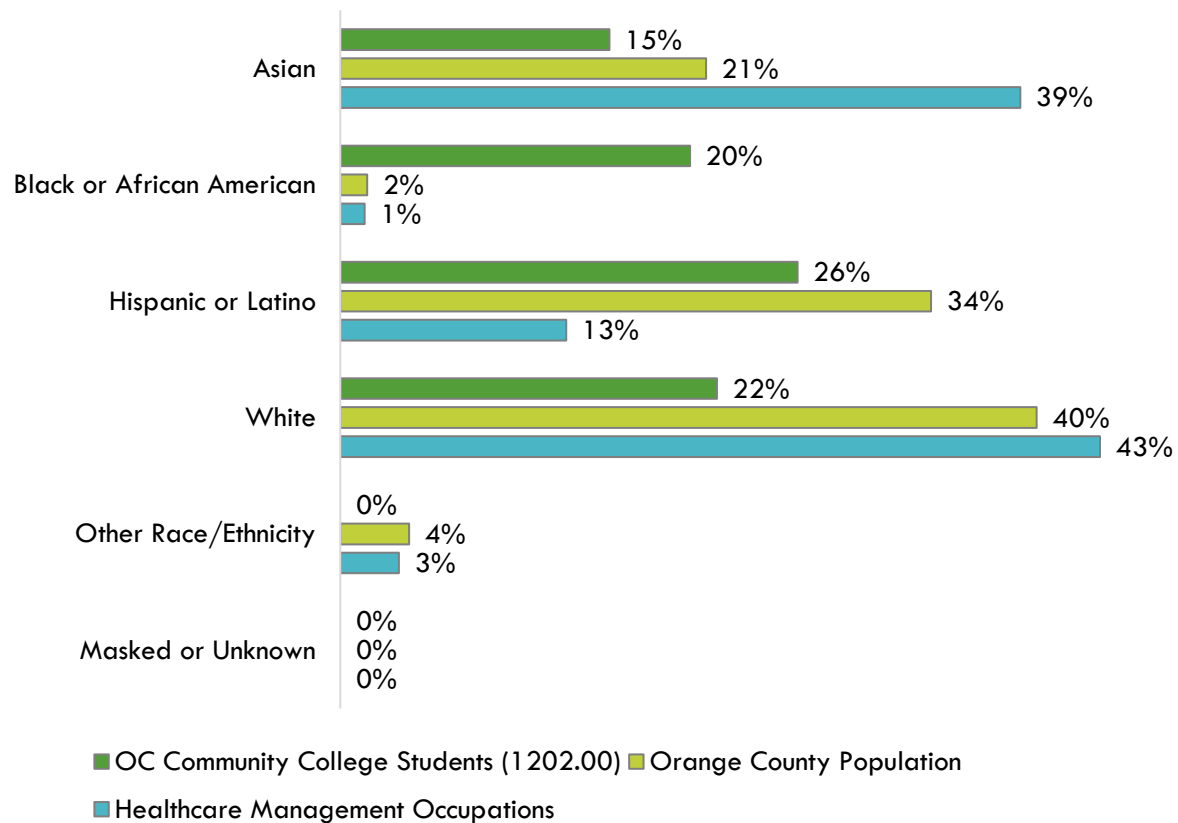
Ethnicity:

Exhibit 17 shows the ethnicity of Orange County community college students enrolled in hospital and healthcare administration programs compared to the overall Orange County population, as well as the two healthcare management occupations included in this report. Notably, 43% of workers employed in these healthcare management occupations are White, which is similar to the population (40%) but much higher than community college students (22%).

Conversely, 22% of community college hospital and healthcare administration students are Black of African American, which is significantly higher than the Orange County population (2%) and workers in these healthcare management occupations (1%). Similarly, Hispanic or Latino students make up 26% of hospital and healthcare administration students, which is lower than the Orange County population (34%), but double the percentage of healthcare management occupations (13%). Finally, 39% of healthcare management workers are Asian, which is significantly higher than hospital and healthcare administration students (15%) and the Orange County population (21%).

Examining disaggregated by occupation (not shown), *medical transcriptionists* – which has entry-level wages below the living wage – has the highest percentage of Asian workers (52%).

Exhibit 17: Program and County Demographics by Ethnicity

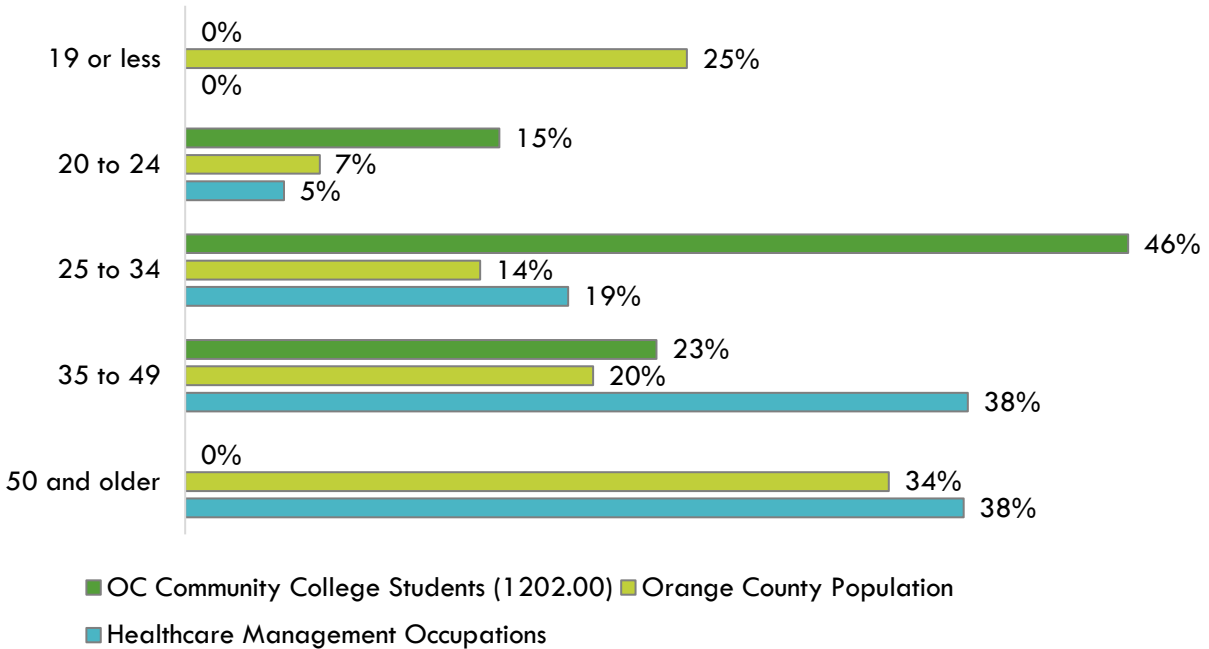


Age:

Exhibit 18 shows the age of Orange County community college students enrolled in hospital and healthcare administration programs compared to the overall Orange County population, as well as the two healthcare management occupations included in this report. The majority of workers in these healthcare management occupations are age 35 and older, which is significantly higher than the population (54%) and community college healthcare management students (23%).

Examining disaggregated data for each occupation (not shown), workers in the middle-skill occupations *medical transcriptionists* are younger, with 67% of workers age 34 or less. Conversely, 79% of *medical and health services managers* are 35 or older.

Exhibit 18: Program and County Demographics by Age

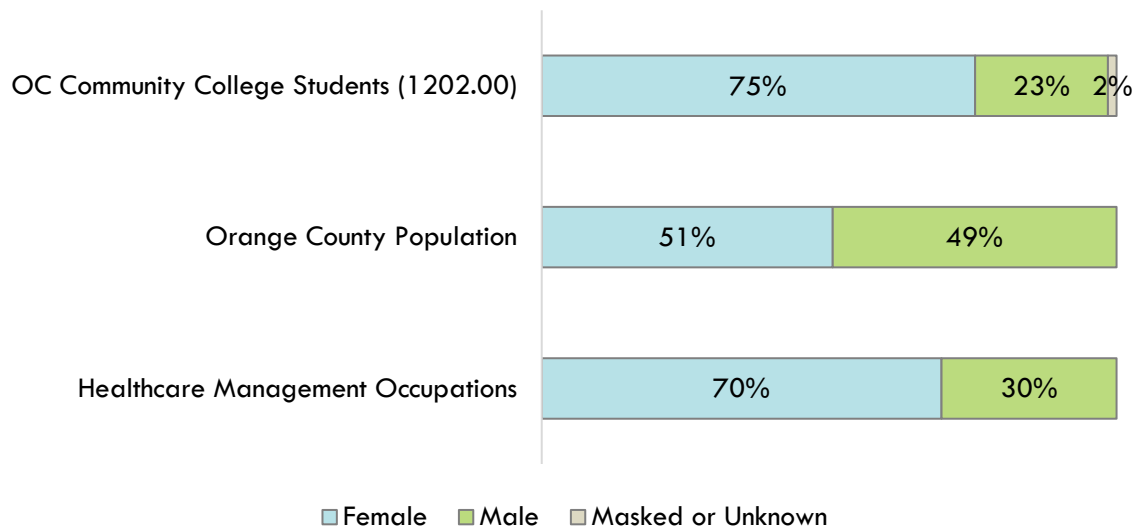


Sex:

Exhibit 19 shows the sex of Orange County community college students enrolled in hospital and healthcare administration programs compared to the overall Orange County population as well as these healthcare management occupations.

Though the Orange County population is split nearly evenly between men and women, 75% of hospital and healthcare administration students and 70% of workers in these healthcare management occupations are women. Examining disaggregated data for each occupation (not shown), *medical transcriptionists* have the highest percentage of women (93%) and also has entry-level wages below the living wage.

Exhibit 19: Program and County Demographics by Sex



Appendix A: Methodology A

The OC COE prepared this report by analyzing data from occupations and education programs. Occupational data is derived from Lightcast, a labor market analytics firm that consolidates data from the California Employment Development Department (EDD), U.S. Bureau of Labor Statistics (BLS) and other government agencies. Program supply data is drawn from two systems: Taxonomy of Programs (TOP) and Classification of Instructional Programs (CIP).

Using a TOP-SOC crosswalk, the OC COE identified middle-skill jobs for which programs within these TOP codes train. Middle-skill jobs include:

- All occupations that require an educational requirement of some college, associate degree or apprenticeship;
- All occupations that require a bachelor's degree, but also have more than one-third of their existing labor force with an educational attainment of some college or associate degree; or
- All occupations that require a high school diploma or equivalent or no formal education, but also require short- to long-term on-the-job training where multiple community colleges have existing programs.

The OC COE determined labor market supply for an occupation or SOC code by analyzing the number of program completers or awards in a related TOP or CIP code. The COE developed a “supply table” with this information, which is the source of the program supply data for this report. TOP code data comes from the California Community Colleges Chancellor's Office MIS Data Mart (datamart.cccco.edu) and CIP code data comes from the Integrated Postsecondary Education Data System (nces.ed.gov/ipeds/use-the-data), also known as IPEDS. TOP is a system of numerical codes used at the state level to collect and report information on California community college programs and courses throughout the state that have similar outcomes. CIP codes are a taxonomy of academic disciplines at institutions of higher education in the United States and Canada. Institutions outside of the California Community College system do not use TOP codes in their reporting systems.

Data included in this analysis represent the labor market demand for relevant positions most closely related to the proposed program as expressed by the requesting college in consultation with the OC COE. Traditional labor market information was used to show current and projected employment based on data trends, as well as annual average awards granted by regional community colleges. Real-time labor market information captures job post advertisements for occupations relevant to the field of study which can signal demand and show what employers are looking for in potential employees, but is not a perfect measure of the quantity of open positions.

All representations have been produced from primary research and/or secondary review of publicly and/or privately available data and/or research reports. The most recent data available at the time of the analysis was examined; however, data sets are updated regularly and may not be consistent with previous reports. Efforts have been made to qualify and validate the accuracy of the data and findings; however, neither the Centers of Excellence for Labor Market Research (COE), COE host district, nor California Community Colleges Chancellor's Office are responsible for the applications or decisions made by individuals and/or organizations based on this study or its recommendations.

Appendix B: Data Sources

Data Type	Source
Occupational Projections, Wages, and Job Postings	<p>Traditional labor market information data is sourced from Lightcast, a labor market analytics firm. Lightcast occupational employment data are based on final Lightcast industry data and final Lightcast staffing patterns. Wage estimates are based on Occupational Employment Statistics and the American Community Survey. For more information, see https://lightcast.io/</p>
Living Wage	<p>The living wage is derived from the Insight Center’s California Family Needs Calculator, which measures the income necessary for an individual of family to afford basic expenses. The data assesses the cost of housing, food, child care, health care, transportation, and taxes. For more information, see: https://insightccd.org/family-needs-calculator/</p> <p>The living wage for one adult in Orange County is \$20.63 per hour (\$42,910.40 annually). This figure is used by the CCCCCO to calculate the percentage of students that attained the regional living wage.</p>
Typical Education and Training Requirements, and Educational Attainment	<p>The Bureau of Labor Statistics (BLS) provides information about education and training requirements for hundreds of occupations. BLS uses a system to assign categories for entry-level education, work experience in a related occupation, and typical on-the-job training to each occupation for which BLS publishes projections data. For more information, see https://www.bls.gov/emp/documentation/education/tech.htm</p>
Emerging Occupation Descriptions, Additional Education Requirements, and Employer Preferences	<p>The O*NET database includes information on skills, abilities, knowledges, work activities, and interests associated with occupations. For more information, see https://www.onetonline.org/help/online/</p>
Educational Supply	<p>The CCCCCO Data Mart provides information about students, courses, student services, outcomes and faculty and staff. For more information, see: https://datamart.cccco.edu</p> <p>The National Center for Education Statistics (NCES) Integrated Postsecondary Integrated Data System (IPEDS) collects data on the number of postsecondary awards earned (completions). For more information, see https://nces.ed.gov/ipeds/use-the-data/survey-components/7/completions</p>
Student Metrics and Demographics	<p>LaunchBoard, a statewide data system supported by the California Community Colleges Chancellor's Office and hosted by Cal-PASS Plus, provides data on progress, success, employment, and earnings outcomes for California community college students. For more information, see: https://www.calpassplus.org/LaunchBoard/Home.aspx</p>

Data Type	Source
Population and Occupation Demographics	<p>The Census Bureau's American Community Survey (ACS) is the premier source for detailed population and housing information. For more information, see: https://www.census.gov/programs-surveys/acs</p> <p>Data is sourced from IPUMS USA, a database providing access to ACS and other Census Bureau data products. For more information, see: https://usa.ipums.org/usa/about.shtml</p>

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September 2022

