



**Becker's Hospital Review Annual Meeting
"Evolving Landscape: Envisioning 2030 "**

May 11, 2013

Presented by Lori Schutte, MBA, President

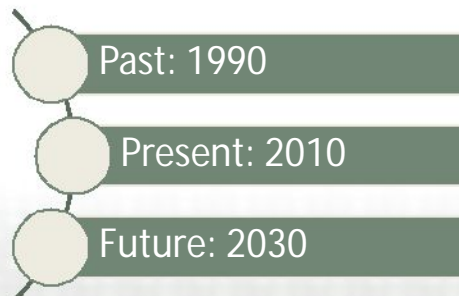


Overview **State of Recruitment**

Introduction

Explore changes and trends over a 40-year span

Key Milestones and Predictions



Slide 2

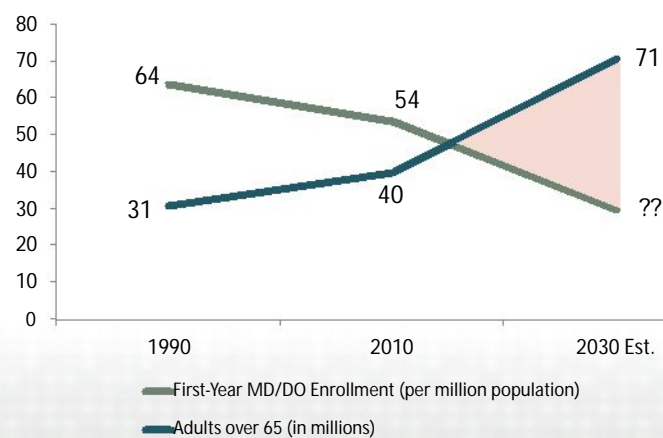
Introduction

Sources of Information

- Annual Career Landscape survey of practicing physicians
- Annual survey of graduating residents and fellows
- Annual Retention Survey with American Medical Group Association
- Survey on Physician Stress and Burnout
- Biennial Physician Compensation Survey with American College of Physician Executives
- Data from the AMA, AAMC and other industry sources

Slide 3

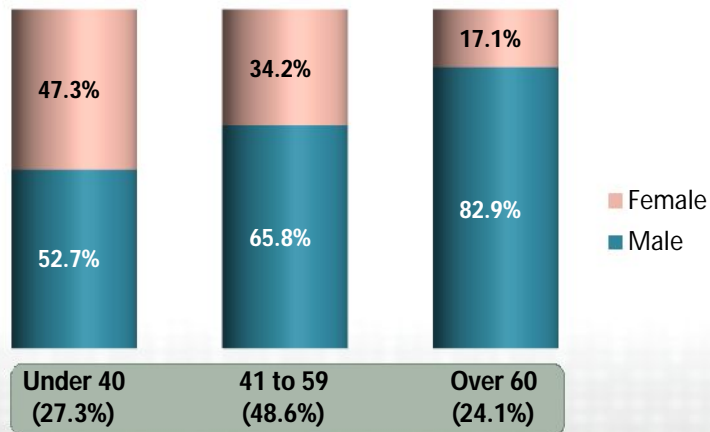
Aging Boomer Population



Source: Association of American Medical Colleges Medical School Enrollment Survey, 2012; U.S. Census

Slide 4

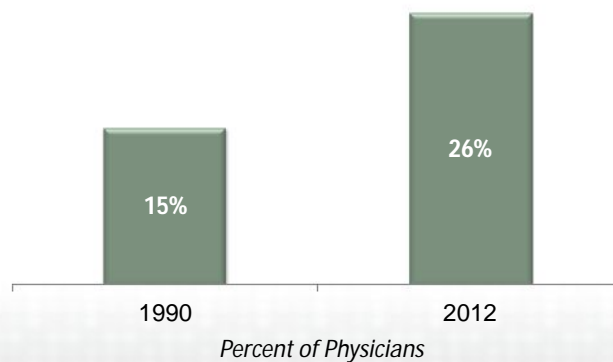
Physician Demographics Today



Source: American Medical Association Masterfile, October 19, 2012

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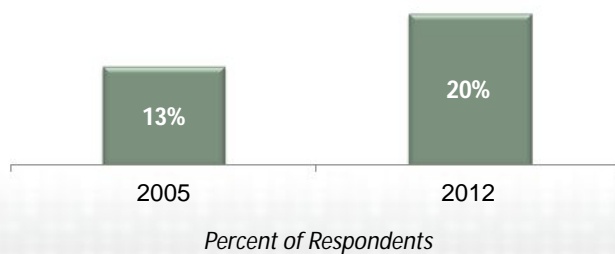
International Medical School Graduates



Source: US Department of Health and Human Services; American Medical Association IMG Section Governing Council

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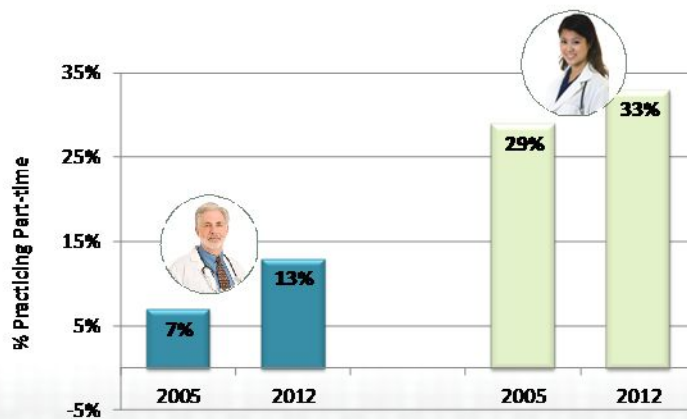
Part-Time Workforce



Source: 2012 Cejka Search and AMGA Physician Retention Survey

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Part-Time Workforce



Source: 2012 Cejka Search and AMGA Physician Retention Survey

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Impact on the Physician Career



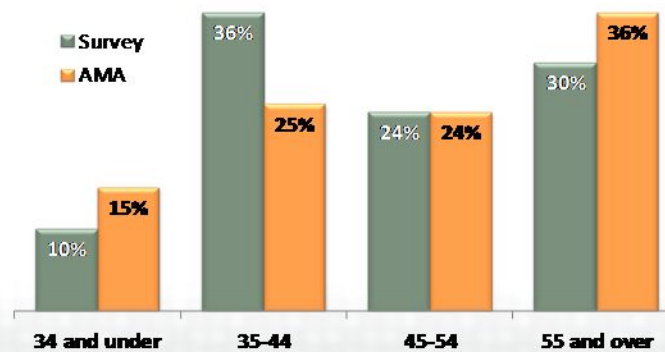
"I'm afraid you've had a paradigm shift."

Slide 9

Survey: *The Evolving Physician Landscape*

Slide 10

The Evolving Physician Landscape

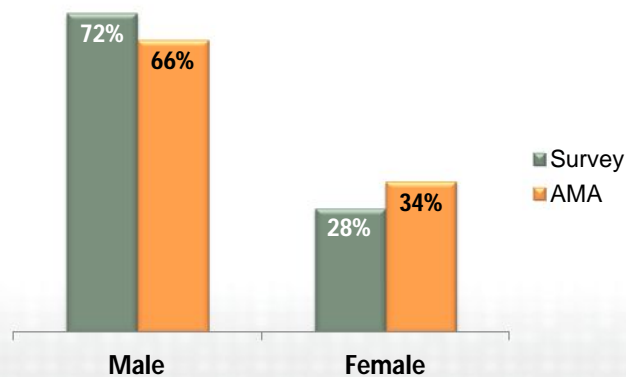


Total number of respondents = 2,633

Source: The Evolving Physician Landscape 2012; Cejka Search / American Medical Association

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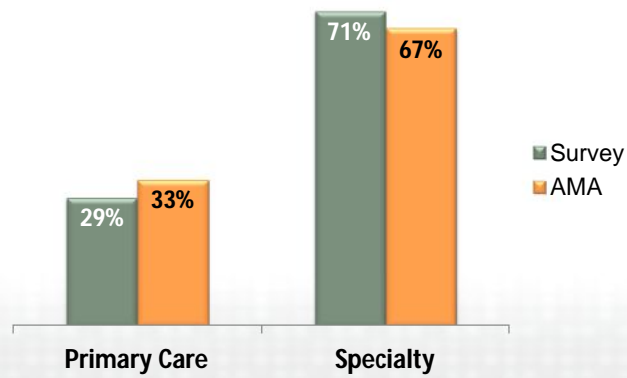
The Evolving Physician Landscape



Source: The Evolving Physician Landscape 2012; Cejka Search / American Medical Association

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The Evolving Physician Landscape

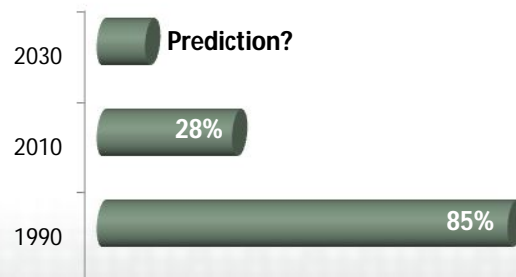


Source: The Evolving Physician Landscape 2012: Cejka Search / American Medical Association

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Medical Group Ownership: Facts

In 2030, what percentage of medical groups will be owned by physicians?

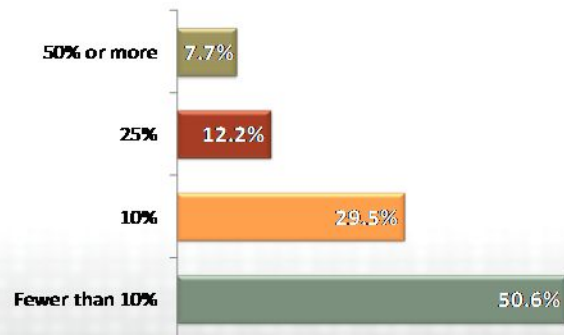


Source: Medical Group Management Association

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Medical Group Ownership: 2030 Predictions

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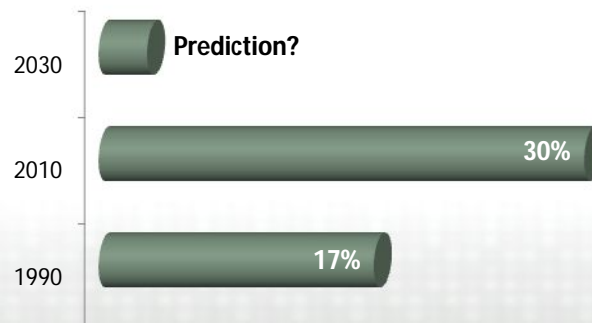


Source: The Evolving Physician Landscape 2012; Cejka Search

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Physician Workforce: Facts

In 2030, what percentage of physicians will be women?

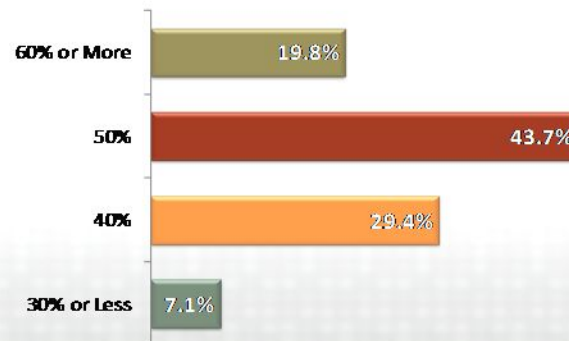


Source: United States Census

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Physician Workforce: 2030 Predictions

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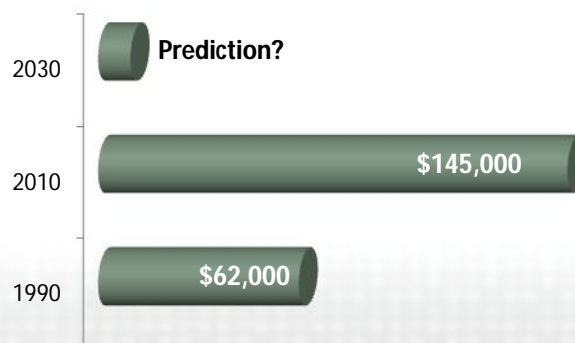


Source: The Evolving Physician Landscape 2012; Cejka Search

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Medical School Debt: Facts

In 2030, how much medical school debt will a physician carry?

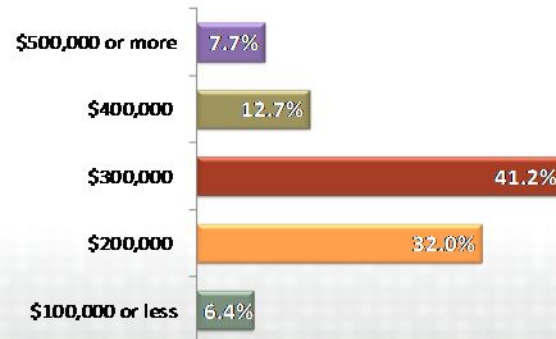


Source: American Medical Association

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Medical School Debt: 2030 Predictions

In 2030, how much medical school debt will a physician carry?

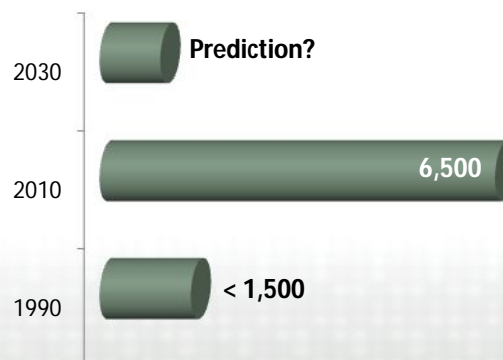


Source: The Evolving Physician Landscape 2012: Cejka Search

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Physician Assistants: Facts

In 2030, how many physician assistants will graduate from training?

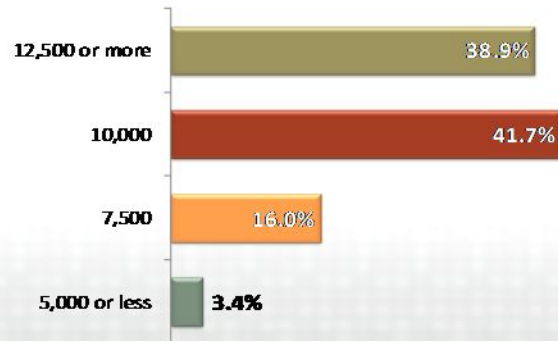


Source: Physician Assistant Education Association

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Healthcare Workforce: 2030 Predictions

**In 2030, how many physician assistants
will graduate from training?**



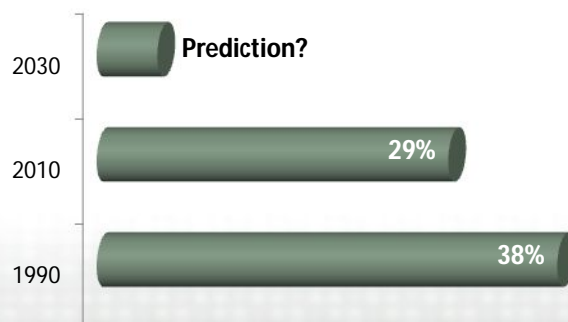
Source: The Evolving Physician Landscape 2012; Cejka Search

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Healthcare Workforce: Facts

**In 2030, what percentage of healthcare workers
will be employed in hospitals?**

(versus ambulatory, nursing home, other)



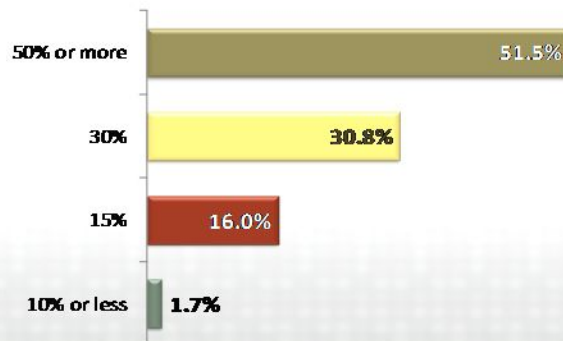
Source: United States Census

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Healthcare Workforce: 2030 Predictions

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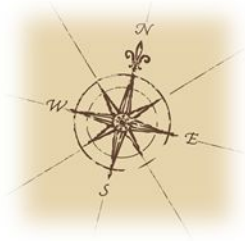
Source: The Evolving Physician Landscape 2012; Cejka Search

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Impact on the Physician Career

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Your Personal Career Strategy



- *Physicians as Employees*
- *Physicians as Team Players*
- *Physicians as Leaders*
- *Physicians and Technology*

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Physicians as Employees

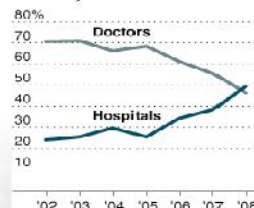
Consolidation is Accelerating

- ❑ 60% of medical groups are actively seeking independent practices to acquire¹
- ❑ 1 in 10 residents/fellows designates a "solo practice" as preferred²

Fewer Private Practices

More doctors are joining hospitals and health systems rather than go into private practice.

Percentage of medical practices owned by ...



Source: Medical Group Management Association


¹Source: Cejka Search and AMGA 2010 Physician Retention Survey

²Source: Cejka Search 2010 Resident and Fellow Survey

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Physicians as Team Players

Evolution of Care Teams

- | | | |
|------|---|--|
| 2009 |  | Hospitalist Programs key to retention |
| 2010 |  | Medical Homes increase competitive recruiting edge |
| 2011 |  | Advanced Practitioners more involved |
| 2012 |  | Teamwork Qualities important in physicians |

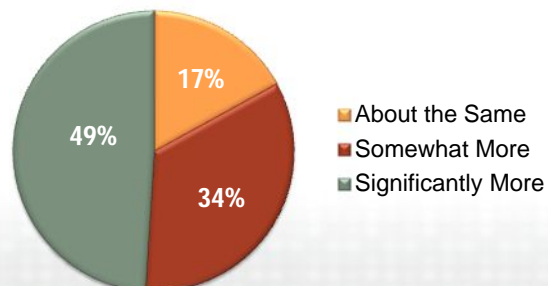
Source: Cejka Search and AMGA Physician Retention Survey, 2008-2011

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Physicians as Team Players

Importance of teamwork qualities in physicians

Compared to 5 Years Ago

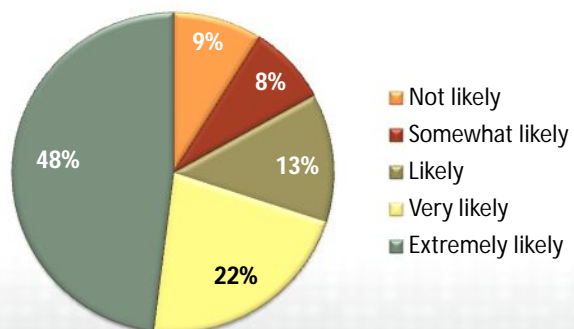


Source: 2011 Cejka Search and AMGA Physician Retention Survey

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Physicians as Leaders

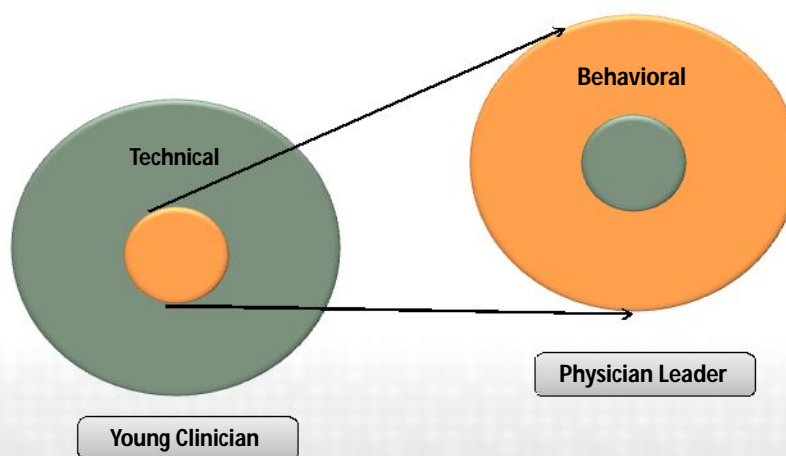
Will you add physicians to your management team?



Source: Envisioning the Future Leadership Team of an Accountable Care Organization, February 2011; American College of Physician Executives, Cejka Executive Search and BDC Advisors, LLC

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Physicians as Leaders



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Physicians as Leaders

Demand for Business Management Training

- ❑ More than 50 universities offer a medical and business degree simultaneously¹
- ❑ 10,000 members in American College of Physician Executives
- ❑ 77% of medical groups allocate budget for physician leadership courses²



¹ Source: MD MBA Programs." Association of MD/MBA Programs
² Source: 2010 Cejka Search and AMGA Physician Retention Survey

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Physicians and Technology

**More than 80% of
U.S. physicians
have
SmartPhones**



Source: Manhattan Research

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Physicians and Technology

*Technology Investments are Top-Priority
Business Decisions*

Medicare payment *uncertainty* has caused these decisions:

60%	Reduce staff salaries and/or benefits Delayed purchase of clinical equipment and/or facilities
14%	Delay purchase of electronic prescribing technologies

Medicare payment *cuts* would cause these decisions:

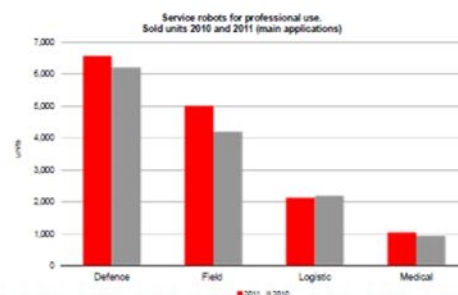
76%	Reduce staff salaries and/or benefits
19%	Delay purchase of electronic medical record systems

Source: MGMA-ACPME, SGR & Medical Payment Design Study, October 2012

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Physicians and Technology

Robotics: Extending Human Touch



Source: International Federation of Robotics, 2012

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Physicians and Technology

Telemedicine: Not Just for the Jetsons



Source: Modern Healthcare, October 2012

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Envisioning 2030

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(1) Describe your vision of the hospital in 2030.



Insight from the survey



- For the sickest/ Critical care
- Hi-technology/ Short stays
- Fewer doctors/ More advanced practice
- Urgent and acute care only
- Collaborative
- Over-regulated/ Government controlled
- Employed physician
- Fewer patients/ Fewer larger hospitals
- Hospitalists with extenders
- Hub for medical care



Quotes from the survey

- iPad in the hand of every practitioner
- A high intensity care place, by specialty, automated, staffed by few physicians and other providers
- A place of last resort - preventive medicine/ambulatory medicine will rule
- Fewer, larger hospital systems with multiple satellite locations
- It will be less "the art of medicine" and more standardized care

(2) Describe how primary care will be delivered in 2030.



Insight from the survey

- Primary care will be delivered by NPs and PAs
- Remote access via technology
- Questioned the qualification/ Training of Advanced Practitioners
- Tiered system: PA/NP for most; concierge doctors for upper income/private





Quotes from the survey

- Two layer health care with basic provided by mostly physician extenders and higher level by doctors
- Many more mid level practitioners – larger groups, fewer small practices
- Increased telemedicine and e-medicine/webcam
- The trend is already set – NPs and PAs will take over primary care, MD and DO will be the specialists
- 50% in office and 50% in form of electronic information exchanges

(3) Describe the medical school graduating class of 2030.

Insight from the survey

- Mostly women, ethnic Americans and IMGs
- Less clinically oriented/ More technically oriented
- Some described them as altruistic less interested in income
- Others commented that these will not be the “best and brightest”
- Less ambitious/ Less “talented”



Quotes from the survey

- 85% women and 1/3 size of today's classes
- Huge debt – looking for work that puts lifestyle over income
- Tech connected both professionally and socially - Able to multi-task efficiently, balance life/work
- Medical students will be more interested in medicine as a business
- Optimistic

(4) What piece of advice would you offer a member of the medical school class of 2030 for professional success?

Insight from the survey

Embrace

Avoid

Specialize

Be Flexible

Work Hard

Work Part-time

Go Elsewhere!

Go for it!



Quotes from the survey

- Listen to your patients, talk with them not to them
- Focus on interpersonal skills and compassionate care as it is likely to make you stand out
- Balance career/home, realistic expectations, choose what you enjoy and find satisfying
- Although medicine is a profession, health care is a business
- Embrace technology

(5) Write your prescription for a financially healthy industry in 2030.

Insight from the survey



MEDICAL CENTER

NAME _____ AGE _____
ADDRESS _____ DATE _____

Rx

Preventative care qd x lifetime

Dispense 1 measure of humanity and stop taking greed

Sig: 1000 hours of mindful consideration on the part of all MDs about quality of life

Take two health bills and sleep in

☐ LABEL

SIGNATURE _____

REFILL 0 1 2 3 4 5 PRN NR

Envisioning 2030 - Summary

Eliminate/ "Cut"

- Government Red Tape
- Waste and Fraud
- Medical School Debt
- Malpractice Lawsuits
- Middlemen

Enhance/ "Add"

- Reimbursement
- Coordination
- Incentives
- Technology
- Autonomy



Discussion

Thank You

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