



Strengthening the Workforce

Steve Wehn, Vice President Government & Community Relations

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The Innovator in Healthcare Workforce Solutions and Staffing Services



AMN Healthcare

The Innovator in Healthcare Workforce Solutions and Staffing Services



Strategy + Staffing + Optimization = AMN



Staffing

- Nurses
- Physicians
- Allied
- Medical Coding



Workforce Solutions

- Managed Services Program
- Recruitment Process Optimization
- Vendor Management Systems



Executive Leadership

- Permanent Leaders
- Interim Leaders



Advisory Services

- Predictive Analytics
- Workforce Optimization
- System Implementations

Key Stats



Founded in 1985 – HQ San Diego

NYSE: AMN – \$2B

2,800 Team Members

700+ Recruiters

6,000 Clients Nationwide



Diverse Client Base

As the market leader, AMN services healthcare facilities in all 50 states including many blue chip healthcare systems



“AMN knows the national landscape. They know what’s out there and what the trends are. They bring that valuable information to us so that we can better plan as partners.”

- Chief Nursing Officer,
Large Integrated Health System & AMN MSP Client



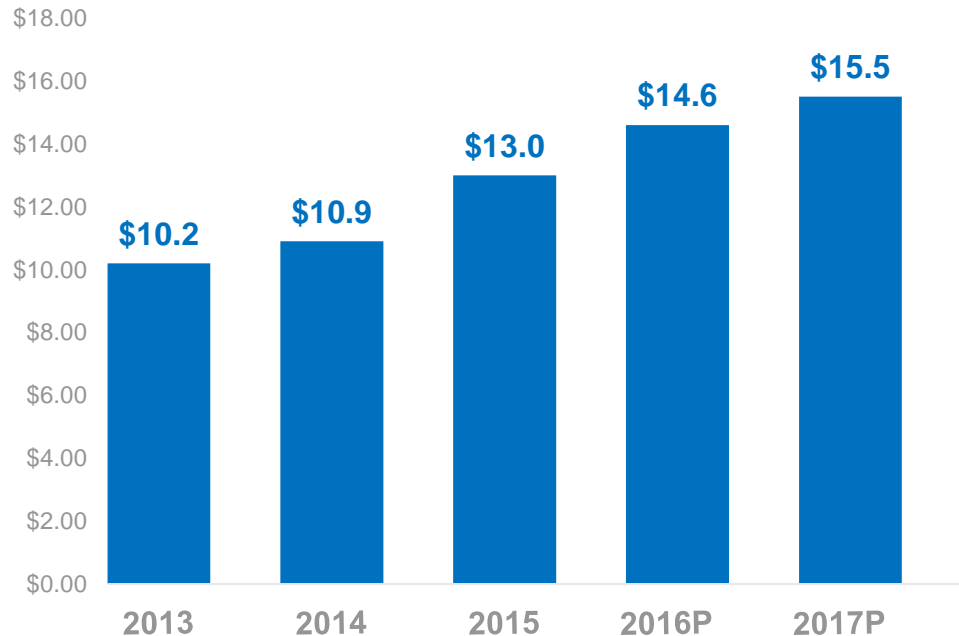
YALE-NEW HAVEN
HEALTH



Healthcare Staffing Market Overview

U.S. Temporary Healthcare Staffing

(\$ in billions)



Demand Drivers

- Stable or improving economy
- Low unemployment
- Shortage of clinician & physicians
- Increased healthcare utilization
- Adoption of outsourced solutions
- Aging population & medical advances
- New emerging clinical roles

Other Addressable Markets: Approximately \$5 Billion
(Perm, RPO, Coding, Workforce Consulting, VMS)

Healthcare Job Openings and Hires

50% of healthcare job openings are currently unfilled

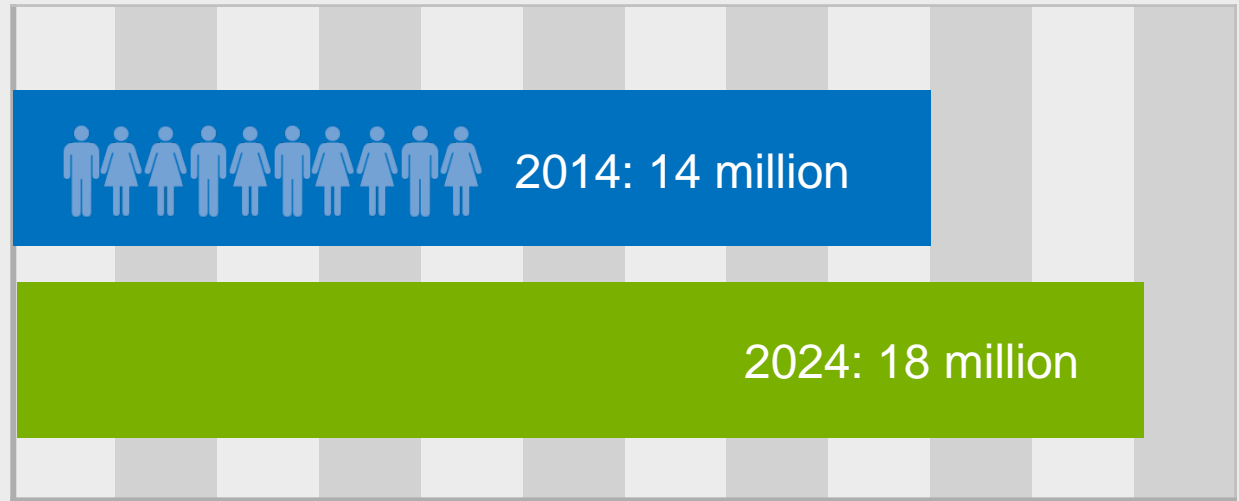


Seasonally adjusted, full-year average as of December 31, 2016. Numbers in thousands.
Source: Job Openings and Labor Turnover Survey, Bureau of Labor Statistics, U.S. Department of Labor

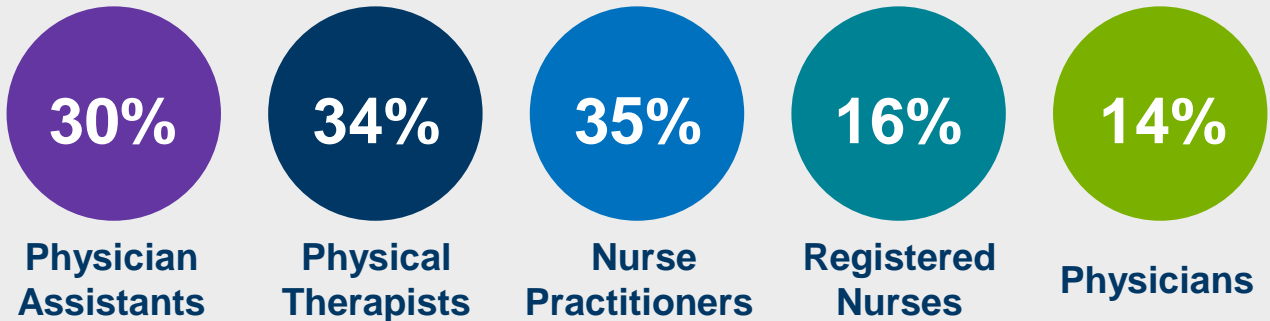
Growth in Healthcare Employment

~4 Million More Healthcare Jobs

Healthcare occupations will add more jobs than any other group of occupations.



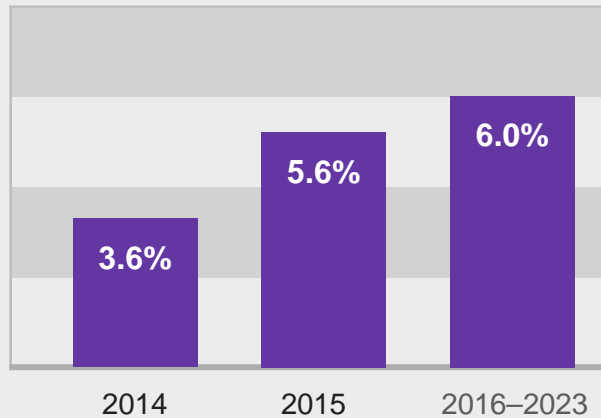
Fast Growing Healthcare Jobs



Source: Bureau of Labor Statistics – Employment Projections, 2014 - 2024.

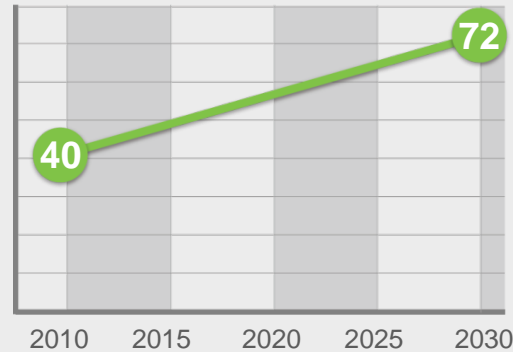
Drivers of Healthcare Employment Growth

Annual Growth in Healthcare Spend



Aging Population and Healthcare Utilization

U.S. population aged 65+
in millions



- Over 65 - 3x more hospital days
- Over 75 - 4x more healthcare days

Source: U.S. Department of Health and Human Services

Aging Healthcare Professionals



- ~ 50% of RNs and physicians are age 50+
- 62% of RNs age 54+ plan to retire in next 3 years
- ~38% of active physicians are age 56 & older

Projected Healthcare Labor Shortage in 2025

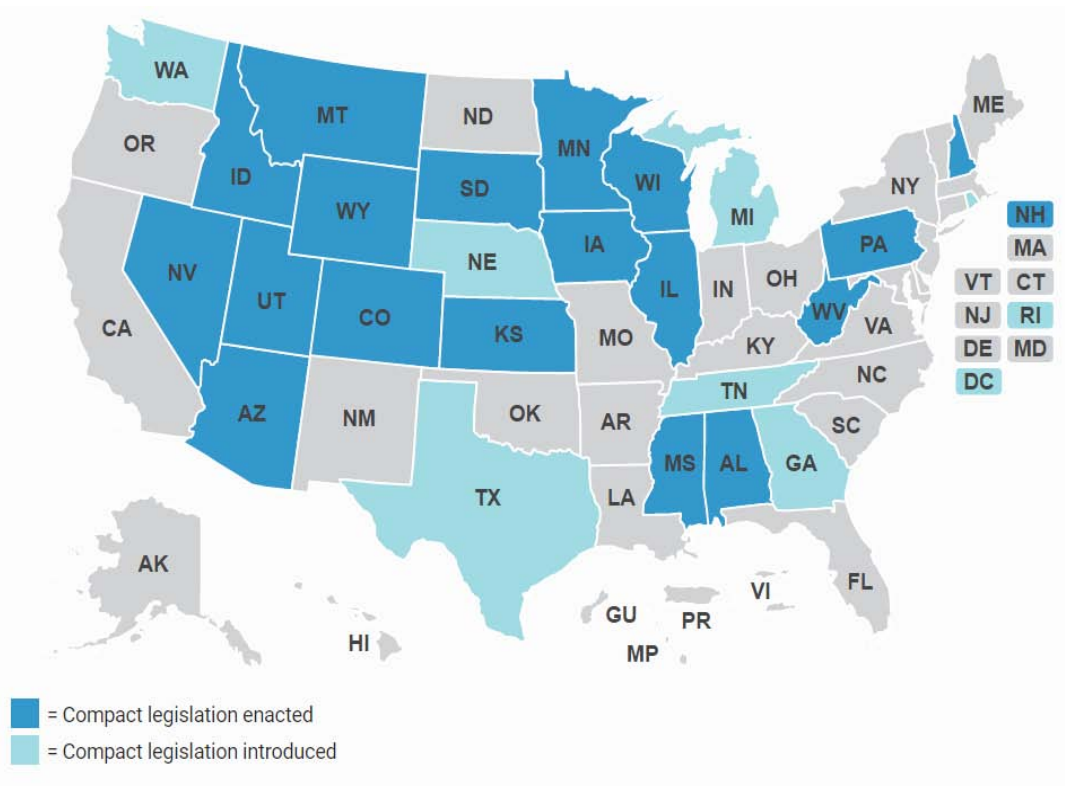


94,700
physician shortage

Regional & specialty
nurse shortages

Source: National Council of State Boards of Nursing and The Forum of State Nursing Workforce Centers – 2013 data and Association of American Medical Colleges April 5, 2016. AMN Healthcare survey, November 2015. AMA Physician Master File and 2012 Physicians Foundation Survey conducted by Merritt Hawkins – 2012 data. National Health Expenditure Projections – CMS, October 2014. Source: AMN Healthcare 2013 Clinical Workforce Survey of Hospital Leaders; (Association of American Medical Colleges, April 5, 2016); Future of the Nursing Workforce, Health Resources and Services Administration, December 2014.

Interstate Medical Licensure Compact – What is it?

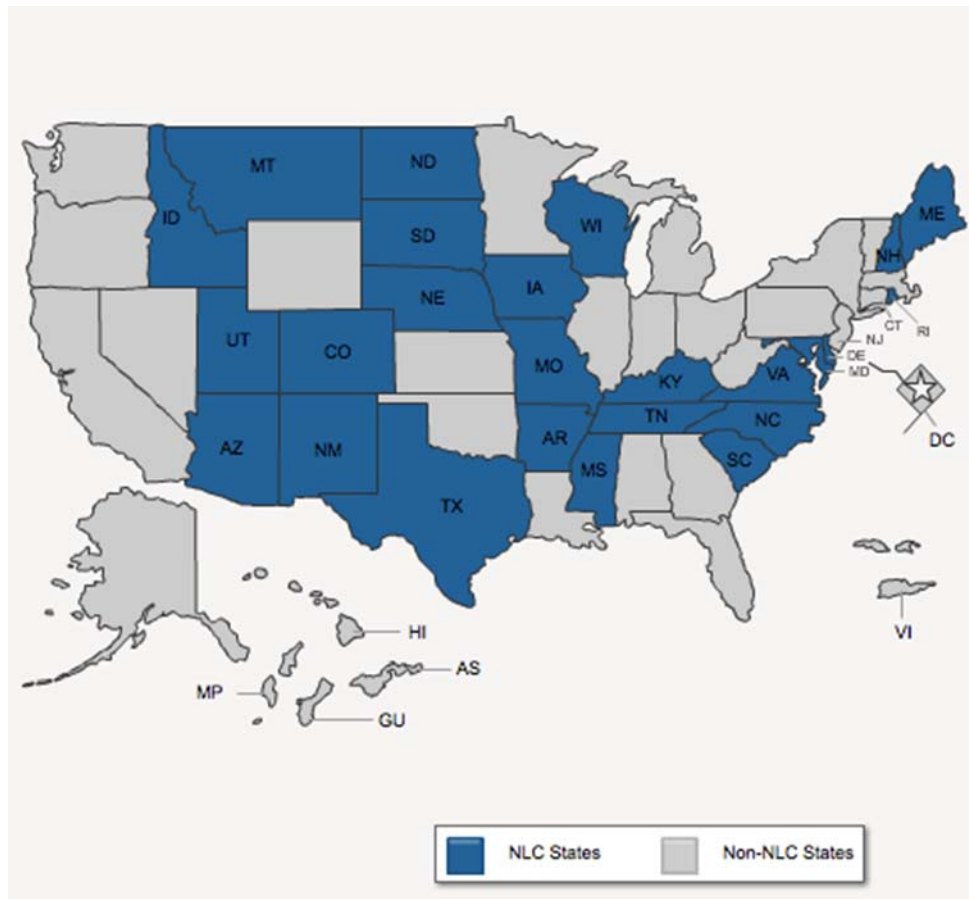


Interstate Medical Licensure Compact

A faster pathway to medical licensure

- A new “expedited” pathway to state licensure for experienced physicians who have outstanding practice histories.
- An agreement between 18 states and the MD/DO Boards in those states to expedite licensure
- Physicians can qualify to practice medicine across state lines within the Compact if they meet the agreed upon eligibility requirements.
- The Application process is expedited by leveraging the physicians existing information previously submitted in their state of principal license (SPL).
- Once qualified, the Physician may select any number of Compact states for which they desire to practice.

Nurse Licensure Compact – What is it?



- Launched in 2000, The Nurse Licensure Compact (NLC) expands the mobility of nurses as part of our nation's health care delivery system.
- NLC allows nurses to have one multistate license, with the ability to practice in both their home state and other compact states.
- Currently, 25 states have enacted the NLC legislation.
- In 2015, an enhanced NLC was developed, which lets nurses provide telehealth nursing services or respond to emergencies in fellow compact states without an additional license.
- South Dakota became the first state to pass the Enhanced NLC in 2016. Nine additional states have followed
- The enhanced compact will come into effect when 26 states pass it or on December 31, 2018.

Strengthening the Healthcare Workforce – What is Needed?



- Recognition in Congress and the Administration the Healthcare Workforce Shortage
- Full Scope of Practice of Practitioners
- Support Expansion of State Licensure Compacts
- Telehealth Advancements
- Federal Funding for Scholarships & Grants





Thank You!

AMN Healthcare, Inc.
1240 High Bluff Drive
San Diego, CA 92130

Phone: (858) 350-3240
Email: steve.wehn@amnhealthcare.com

