



SUBSECTOR WORKFORCE ASSESSMENT

Prepared for DCHA Program
Services Company, Inc

April 2021

In the following report, Hanover presents findings from a labor market assessment focused on the District of Columbia (DC) and DC-Maryland-Virginia (DMV) region. Specifically, Hanover identifies high-potential healthcare occupations that do not require a postsecondary degree.



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EXECUTIVE SUMMARY

RECOMMENDATIONS

Hanover recommends that DCHA Program Services Company, Inc :



Recommend training initiatives for medical assistants, psychiatric technicians, and psychiatric aides.

Medical assistants, psychiatric technicians, and psychiatric aides are among the fastest-growing and highest-volume non-degree healthcare professions in DC. Each occupation also crosses all of DCHA Program Services Company, Inc's priority subsectors, with robust employment in the acute, ambulatory, and skilled nursing and residential facilities industries. As a result, these occupations present the most promising opportunities for the DC Workforce Investment Council's (DC WIC) future training programs.



Prioritize physical therapist aides and medical records technicians as additional high-potential occupations.

These occupations may also be viable candidates for DC WIC's training efforts based on industry trends and employment across priority subsectors. Both professions remain comparatively small but are projected to increase faster than total job growth in DC, demonstrating strong labor market need. DCHA Program Services Company, Inc should also consider suggesting programming for home health aides and nursing assistants. These occupations are among the highest-volume non-degree occupations in DC and serve comparable roles in different priority subsectors. While distinct in licensure requirements and medical education, overlapping training and employment offer the potential of a coordinated training program.

KEY FINDINGS

DC's largest projected healthcare occupations that do not require a postsecondary degree are personal care aides, nursing assistants, and home health aides. The personal care aide workforce will grow to nearly 10,500 by 2030. Employment of nursing assistants and home health aides is projected to reach about 4,500 and 3,500, respectively. Notably, psychiatric technicians and aides rank among the largest projected non-degree occupations in DC but not in the DMV.

High-growth non-degree occupations are consistent across DC and the DMV area but vary slightly in rank. Home health and personal care aides lead observed occupations by projected employment growth through 2030. Massage therapists will experience the next fastest growth in both geographic areas, tied with medical assistants in DC and physical therapist aides in the DMV.

Employment trends across priority subsectors in DC highlight licensed practical nurses and nursing assistants as additional candidates for DC WIC's training efforts. These occupations rank among the 20 largest non-degree professions in DC's acute, ambulatory, and skilled nursing and residential facilities industries and are projected to keep pace with overall job growth.

Emerging professions such as occupational therapy aides and health aid specialists may be viable emphases for DC WIC in the long-term. Nationally, both occupations are characterized by above-average projected employment growth but below-average annual openings through 2029. Due to the comparatively small size of these occupations, DCHA Program Services Company, Inc should deprioritize these occupations over other high-potential options in the near-term.

INTRODUCTION & METHODOLOGY

INTRODUCTION

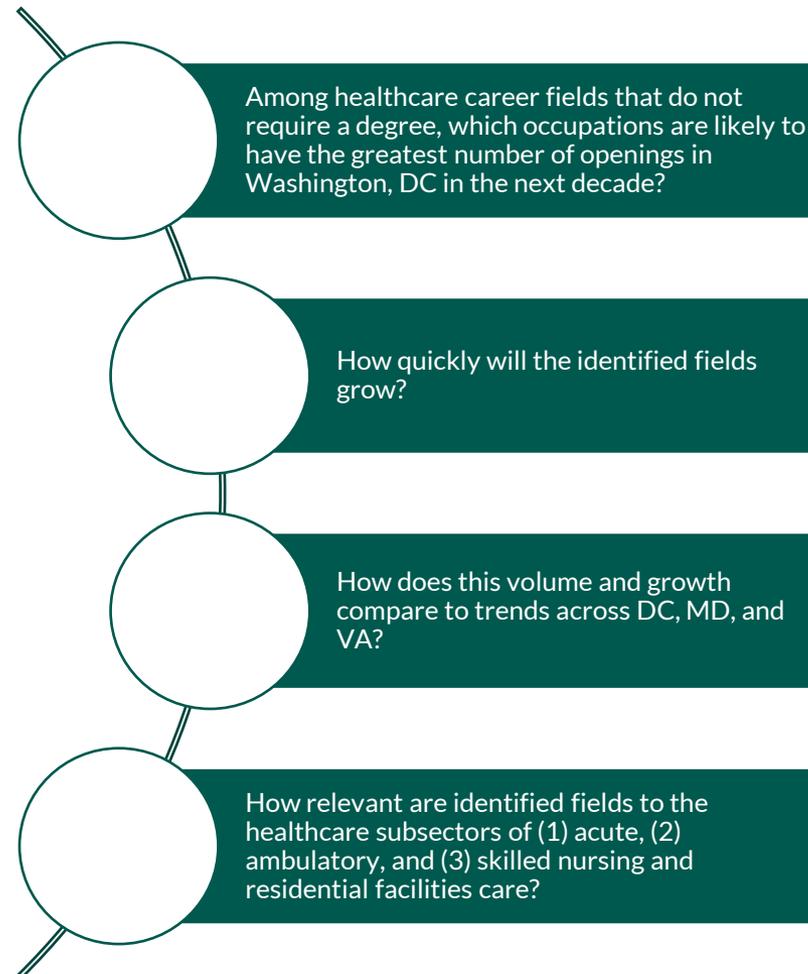
As the convener of the DC Health Care Workforce Partnership (the Partnership), DCHA Program Services Company, Inc is spearheading member efforts to identify training priorities for DC WIC. The Partnership aims to recommend three to five promising non-degree healthcare occupations that cross the subsectors of acute, ambulatory, and skilled nursing and residential facilities. The Partnership will select occupations based on employment volume, growth projections, relevance to priority subsectors, and potential for career pathing.

Hanover conducted a labor market assessment to help DCHA Program Services Company, Inc identify and prioritize occupations. Based on long-term employment projections for DC and the DMV region, the report identifies in-demand healthcare occupations that do not require a postsecondary degree. Hanover also conducted a scan of secondary literature and a high-level analysis of DC's acute, ambulatory, and skilled nursing and residential facilities industries to identify additional high-potential occupations.

METHODOLOGY

Hanover utilized industry employment data from the Bureau of Labor Statistics (BLS) to assess an occupation's relevancy to DCHA Program Services Company, Inc's priority subsectors. For each occupation, BLS identifies the top five industries by employment volume using the North American Industry Classification System (NAICS). Hanover coded an occupation as relevant to a priority subsector if a subsidiary industry (as determined by NAICS) ranks among the top five industries of employment. Acute, ambulatory, and skilled nursing/residential facilities subsectors fall within the top five industries for all high-potential occupations identified in this report, unless noted otherwise.

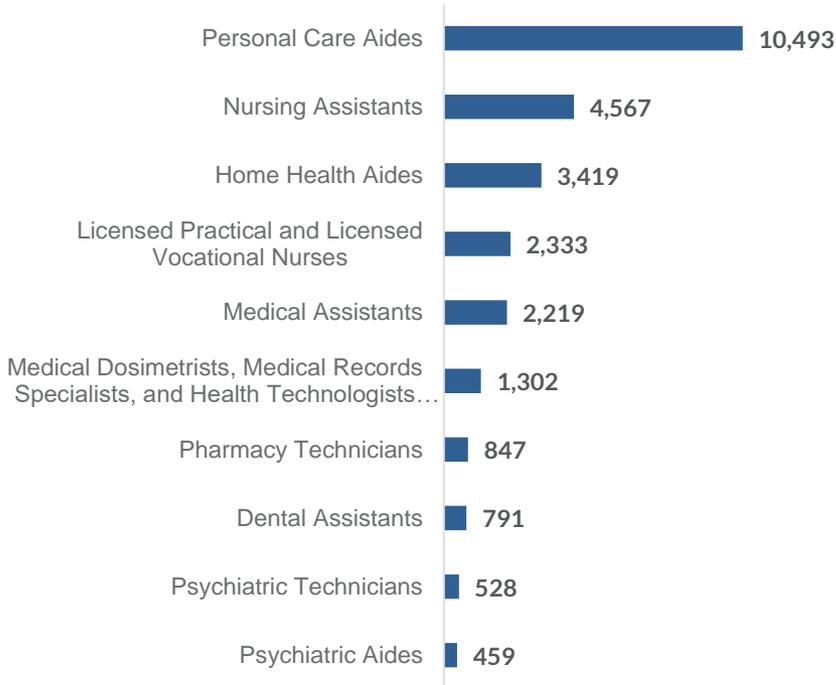
RESEARCH QUESTIONS



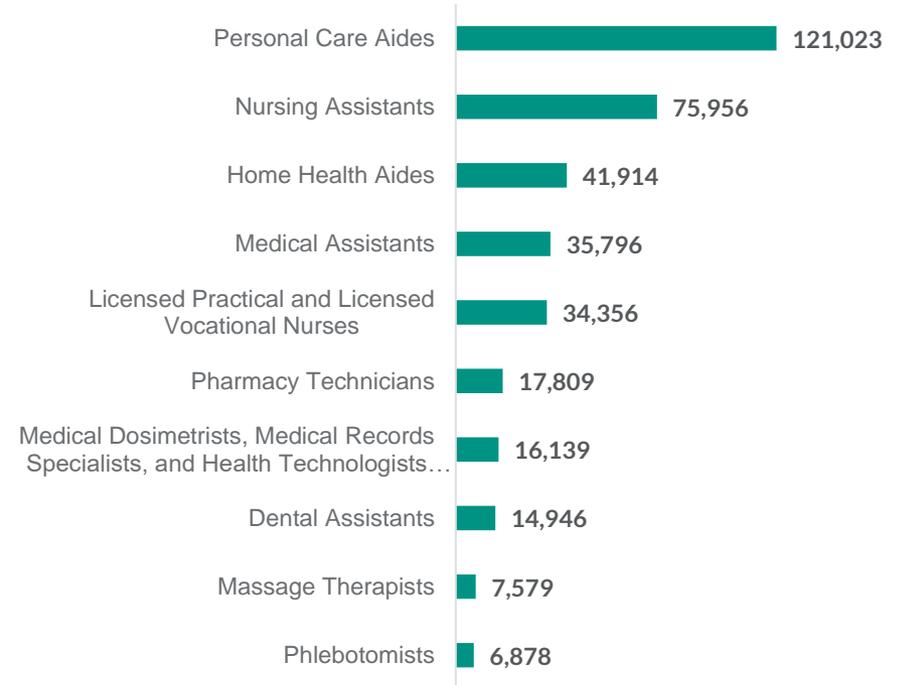
HIGH-VOLUME OCCUPATIONS

Among healthcare occupations that do not require a postsecondary degree, personal care aides will comprise the largest workforce in both DC and the broader interstate metro area. The DC personal care aide workforce will increase by 2,500 employees between 2020 and 2030. This volume is more than double the projected nursing assistant workforce (4,567), which will rank as the second-largest non-degree occupation in DC and the DMV area. Other high-volume occupations in both geographies include home health aides; medical assistants; licensed practical nurses; pharmacy technicians; and other medical technologists/technicians and records specialists. Notably, psychiatric technicians and psychiatric aides rank among the largest projected non-degree occupations in DC but not in the DMV.

DC HIGHEST-VOLUME NON-DEGREE OCCUPATIONS BY 2030



DMV HIGHEST-VOLUME NON-DEGREE OCCUPATIONS BY 2030



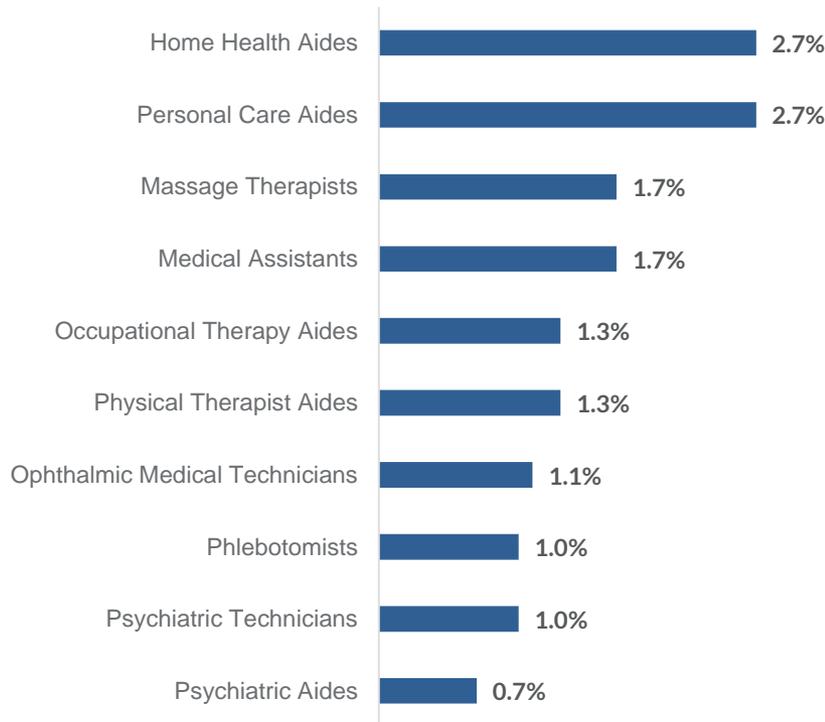
Source: JobsEQ



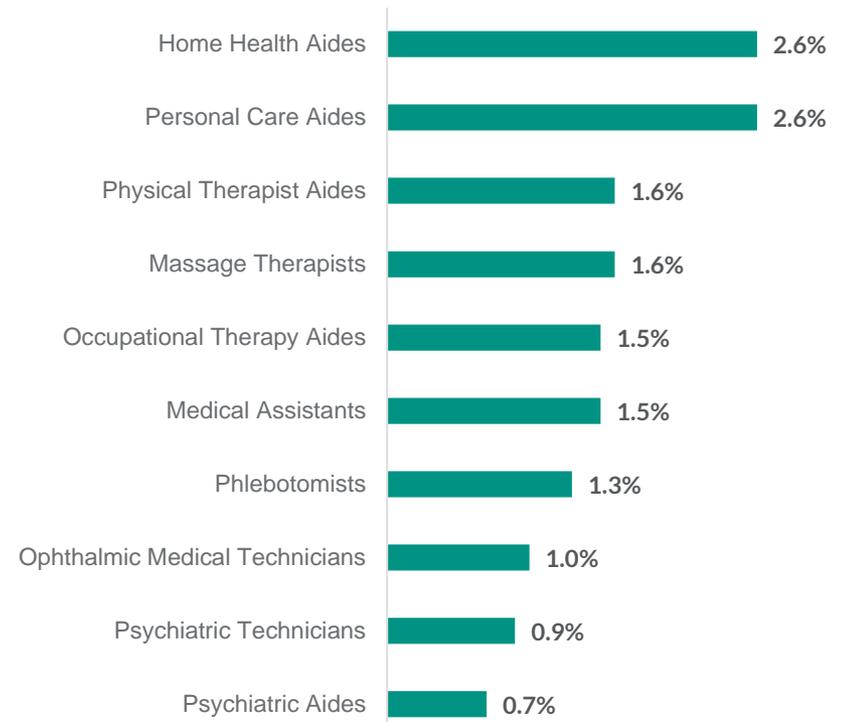
HIGH-GROWTH OCCUPATIONS

Home health and personal care aides will enjoy the fastest employment growth among non-degree healthcare occupations in DC and the DMV. From 2020 to 2030, these professions are projected to grow at an annualized rate of 2.7 percent in DC and 2.6 percent in the DMV, notably higher than all other observed occupations. Massage therapists will experience the next fastest growth in both geographic areas, tied with medical assistants in DC (1.7 percent) and physical therapist aides in the DMV (1.6 percent). The remaining high-growth non-degree healthcare occupations are consistent across DC and the DMV but vary slightly in rank.

DC FASTEST-GROWTH NON-DEGREE OCCUPATIONS, 2020-2030



DMV FASTEST-GROWTH NON-DEGREE OCCUPATIONS, 2020-2030



Source: JobsEQ



HIGHER EDUCATION

HIGH-VOLUME, HIGH-GROWTH OCCUPATIONS

Ten occupations rank among the highest-volume and fastest-growing non-degree healthcare professions in DC, as shown in the figure below. Among these, three are highly relevant across DCHA Program Services Company, Inc's priority subsectors: medical assistants, psychiatric technicians, and psychiatric aides. These occupations present the most promising opportunities for DC WIC's future workforce development initiatives. DCHA Program Services Company, Inc should also consider suggesting joint programming for home health aides and nursing assistants. While neither occupation crosses all three priority subsectors, they serve comparable roles in overlapping areas: home health aides typically work in ambulatory and long-term care settings, whereas nursing assistants usually work in acute and long-term facilities. Licensure requirements and medical preparation differ across the two professions; however, a coordinated training program may be viable due to intersecting training and employment opportunities.

DC HIGH VOLUME & HIGH-GROWTH NON-DEGREE OCCUPATIONS, 2020-2030

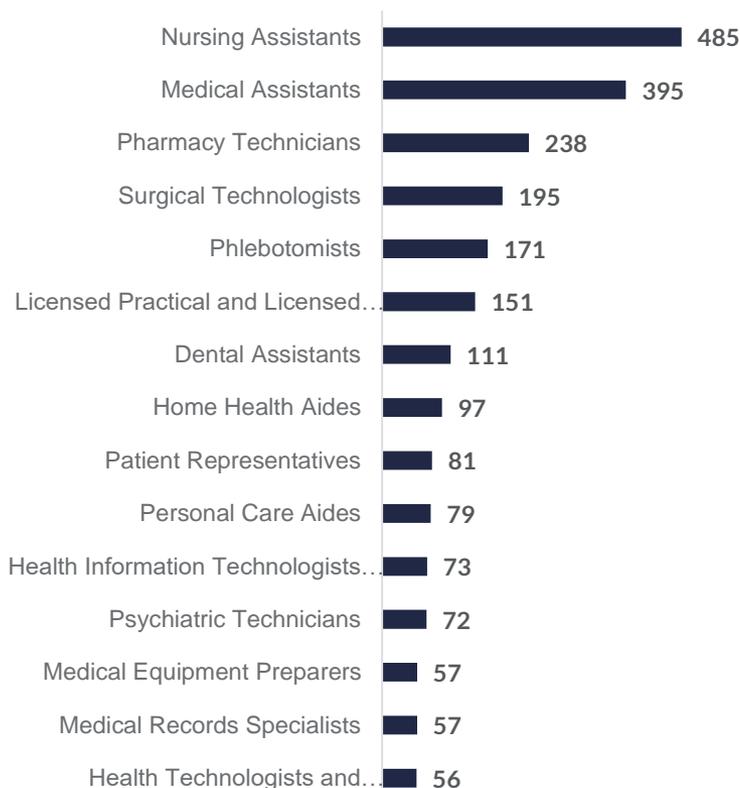
Rank Group	Occupation	Top Sector of Employment (2019)	Relevant Subsector	Education Level
Top 10 High-Volume & High-Growth	Personal Care Aides	Individual and family services (44%)	✓ Ambulatory	High school diploma or equivalent
	Home Health Aides		✓ Skilled Nursing & Residential Facilities	High school diploma or equivalent
	Medical Assistants	Offices of physicians (57%)	✓ Acute ✓ Ambulatory ✓ Skilled Nursing & Residential Facilities	Postsecondary non-degree award
	Psychiatric Technicians	Psychiatric and substance abuse hospitals; state, local, and private (40%)	✓ Acute ✓ Ambulatory ✓ Skilled Nursing & Residential Facilities	Postsecondary non-degree award
	Psychiatric Aides	Psychiatric and substance abuse hospitals; state, local, and private (39%)	✓ Acute ✓ Ambulatory ✓ Skilled Nursing & Residential Facilities	High school diploma or equivalent
Top 20 High-Volume & High-Growth	Emergency Medical Technicians	Ambulance services (46%)	✓ Acute ✓ Ambulatory	Postsecondary non-degree award
	Paramedics			Postsecondary non-degree award*
	Massage Therapists	Self-employed workers (35%)	✓ Ambulatory	Postsecondary non-degree award
	Phlebotomists	Hospitals; state, local, and private (38%)	✓ Acute ✓ Ambulatory	Postsecondary non-degree award
	Ophthalmic Medical Technicians	Medical equipment and supplies manufacturing (58%)**	✓ Acute ✓ Ambulatory	High school diploma or equivalent

Source: [Bureau of Labor Statistics](https://www.bls.gov). Note: Relevant subsector determined based on top sector of employment and corresponding [NAICS code](https://www.bls.gov) based on [BLS](https://www.bls.gov) industry descriptions. *BLS notes that paramedics may need an associate's degree in some instances, though postsecondary non-degree awards are typical. **Data reflect dental laboratory and medical technicians as well.

REAL-TIME JOB POSTINGS INTELLIGENCE

An analysis of DC job postings reveals strong employer demand for nursing assistants and medical assistants over the past six months. Pharmacy technicians, surgical technologists, and phlebotomists have also encountered robust hiring patterns. Relatedly, DC employers have posted 72 recent openings for psychiatric technicians, confirming labor market need for vocational training in this area as well. Across these fields, employers seek workers with knowledge of medical terminology and experience working in long-term care. In-demand soft skills typically relate to collaboration, interpersonal abilities, and self-guided work. The most sought certifications, such as Certified Nursing Assistant and Basic Life Support, generally align with the occupations linked to the most recent job postings.

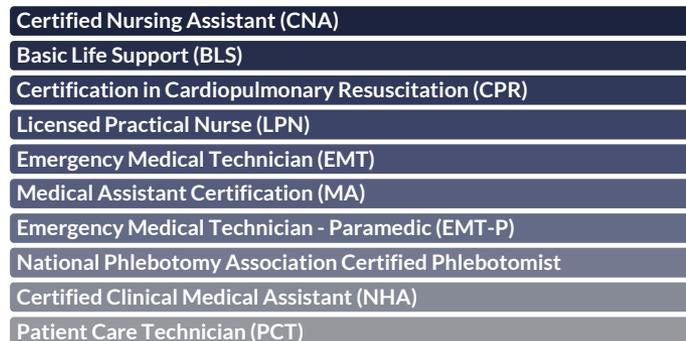
MOST IN-DEMAND NON-DEGREE OCCUPATIONS



MOST IN-DEMAND SKILLS



MOST IN-DEMAND CERTIFICATIONS



Source: [JobsEQ](#). Note: Hard skills exclude Microsoft Office Suite, typing, and personal computers.

EMERGING OCCUPATIONS WITH PROMISE

PHYSICAL THERAPIST AIDES



The most recent [National Ambulatory Medical Care Survey](#) identified physical therapy as the most frequently sought treatment during physician office visits, suggesting a strong need for related professionals. [Physician therapist aides](#) (PTAs) execute tasks that indirectly support physical therapy care, such as setting up and cleaning treatment areas, moving patients, and completing clerical duties. PTAs rank 11th in *US News and World Report's* ([USNWR](#)) list of the best healthcare support roles. A [high school diploma or equivalent](#) is the typical educational requirement for PTAs.

Nationally, PTAs are commonly found across all three of DCHA Program Services Company, Inc's subsectors of interest. Most PTAs work in [Offices of Other Health Practitioners](#) (68.4 percent); nevertheless, General Medical and Surgical Hospitals and Nursing Care Facilities also fall within the top five industries of employment. PTAs rank among the 10 fastest-growing non-degree healthcare occupations in DC and the DMV area broadly. BLS projects that the DC PTA workforce will grow to 138 by 2028, with an average of 18 openings annually.

MEDICAL RECORDS TECHNICIANS



[Medical records and health information technicians](#) prepare, process, and organize patient data to update individual medical histories, maintain databases and registries, and process reimbursements. Alternate job titles include medical records technician, medical coders, and health information specialists. Employment of these professionals is forecasted to increase faster than total job growth in DC and the nation. According to [BLS](#), labor demand is driven by the widespread use of Electronic Health Records and the aging population's growing volume of patient data and reimbursement claims. The need for health information professionals will increase in all healthcare subsectors. [USNWR](#) ranks medical records technician 18th among the best healthcare support jobs. A high school diploma or postsecondary certificate is typically [required for entry](#) in the profession.

The [top industries of employment](#) for this occupation are General Medical and Surgical Hospitals, Office of Physicians, and Nursing Care Facilities, demonstrating relevance to all subsectors of interest. Medical records specialists are among the highest-volume non-degree healthcare occupations in DC and the DMV area. BLS projects a DC workforce of 533 by 2028, with 39 annual openings on average.

EMERGING OCCUPATIONS WITH PROMISE

OCCUPATIONAL THERAPY AIDES



Similar to PTAs, [occupational therapy aides](#) (OTAs) complete tasks that indirectly support patient therapy. These include preparing and cleaning treatment areas, setting up equipment, transporting patients, and helping patients with billing and insurance forms. These professionals are relevant to each of DCHA Program Services Company, Inc's subsectors of interest. As of May 2020, the industries with the [highest employment](#) of OTAs are Office of Other Health Practitioners, General Medical and Surgical Hospitals, and Nursing Care Facilities. The minimum education required for entry is a high school diploma or equivalent. OTAs usually receive a few weeks of on-the-job training.

With a national workforce of 8,000 in 2019, the occupation remains small compared to PTAs and Medical Records Technicians. Nevertheless, BLS projects rapid growth in employer demand, resulting in 1,500 new jobs through 2029. Washington-Arlington-Alexandria, DC-VA-MD-WV employs the fifth largest OTA workforce across metropolitan areas. DC employment data is not available.

HEARING AID SPECIALISTS



[Hearing aid specialists](#) select, fit, and test hearing aids for customers. Hearing aid specialists typically work in Health and Personal Care Stores and ambulatory care settings. General Medical and Surgical Hospitals are the fifth largest industry of employment, with 340 hearing aid specialists as of May 2020. The relevance of these professionals will likely increase in long-term care facilities. A recent [McKnight's Long-Term Care News](#) contributor posits that nursing homes and other eldercare providers will need more hearing aid specialists as a result of legislation which now allows seniors to purchase hearing aids without an audiologist.

As with OTAs, the national hearing aid specialist workforce remains comparatively small (8,100 in 2019). BLS projects that employment of these professionals will increase by 900 through 2029. [USNWR](#) ranks hearing aid specialists 25th among the best healthcare support roles and ninth among the highest-paying jobs that do not require a degree. The median salary for hearing aid specialists was \$53,420 in 2019.

DC SUBSECTOR ANALYSIS

Occupation distribution trends across priority subsectors in DC suggest that licensed practical nurses and nursing assistants are also strong candidates for DC WIC’s future training initiatives. Hanover examined the largest non-degree occupations that cross DC’s acute, ambulatory, and skilled nursing/residential facilities subsectors to identify additional high-potential jobs for DCHA Program Services Company, Inc. Three of the 20 largest cross-sector occupations are projected to grow through 2030: licensed practical and licensed vocational nurses, medical assistants, and nursing assistants. These trends affirm the need for vocational training for medical assistants and demonstrate additional programming opportunities for licensed practical nurses and nursing assistants.

CROSS-SECTOR, NON-DEGREE HEALTHCARE OCCUPATIONS IN DC

		Employment, 2020	Exits	Transfers	Employment Growth	Total Demand, 2030	Average Annual Wages
ACUTE	Licensed Practical and Licensed Vocational Nurses	500	187	230	107	524	\$53,500
	Medical Assistants	995	428	780	238	1,445	\$44,700
	Nursing Assistants	393	240	258	114	612	\$35,600
AMBULATORY	Licensed Practical and Licensed Vocational Nurses	361	125	154	17	296	\$54,200
	Medical Assistants	642	264	481	86	832	\$44,500
	Nursing Assistants	1,671	915	983	61	1,959	\$35,300
NURSING	Licensed Practical and Licensed Vocational Nurses	388	134	166	17	318	\$55,000
	Medical Assistants	47	20	37	12	69	\$38,800
	Nursing Assistants	1,088	598	642	48	1,287	\$35,100
ALL PRIORITY	Licensed Practical and Licensed Vocational Nurses	1,249	446	550	141	1,138	--
	Medical Assistants	1,684	712	1,298	336	2,346	--
	Nursing Assistants	3,152	1,753	1,883	223	3,858	--

Source: [JobsEQ](#).



APPENDIX

NON-DEGREE HEALTHCARE OCCUPATIONS

Occupation	SOC Code	Description
Emergency Medical Technicians	29-2042	Assess injuries, administer emergency medical care, and extricate trapped individuals. Transport injured or sick persons to medical facilities.
Paramedics	29-2043	
Pharmacy Technicians	29-2052	Prepare medications under the direction of a pharmacist. May measure, mix, count out, label, and record amounts and dosages of medications according to prescription orders.
Psychiatric Technicians	29-2053	Care for individuals with mental or emotional conditions or disabilities, following the instructions of physicians or other health practitioners. Monitor patients' physical and emotional well-being and report to medical staff. May participate in rehabilitation and treatment programs, help with personal hygiene, and administer oral or injectable medications.
Surgical Technologists	29-2055	Assist in operations, under the supervision of surgeons, registered nurses, or other surgical personnel. May help set up operating room, prepare and transport patients for surgery, adjust lights and equipment, pass instruments and other supplies to surgeons and surgeons' assistants, hold retractors, cut sutures, and help count sponges, needles, supplies, and instruments. Excludes "Surgical Assistants."
Ophthalmic Medical Technicians	29-2057	Assist ophthalmologists by performing ophthalmic clinical functions. May administer eye exams, administer eye medications, and instruct the patient in care and use of corrective lenses.
Licensed Practical and Licensed Vocational Nurses	29-2061	Care for ill, injured, or convalescing patients or persons with disabilities in hospitals, nursing homes, clinics, private homes, group homes, and similar institutions. May work under the supervision of a registered nurse. Licensing required.
Opticians, Dispensing	29-2081	Design, measure, fit, and adapt lenses and frames for client according to written optical prescription or specification. Assist client with inserting, removing, and caring for contact lenses. Assist client with selecting frames. Measure customer for size of eyeglasses and coordinate frames with facial and eye measurements and optical prescription. Prepare work order for optical laboratory containing instructions for grinding and mounting lenses in frames. Verify exactness of finished lens spectacles. Adjust frame and lens position to fit client. May shape or reshape frames. Includes contact lens opticians.
Hearing Aid Specialists	29-2092	Select and fit hearing aids for customers. Administer and interpret tests of hearing. Assess hearing instrument efficacy. Take ear impressions and prepare, design, and modify ear molds. Excludes "Audiologists."
Medical Dosimetrists, Medical Records Specialists, and Health Technologists and Technicians, All Other	29-2098	This occupation includes the 2018 SOC occupations 29-2036 Medical Dosimetrists; 29-2072 Medical Records Specialists; and 29-2099 Health Technologists and Technicians, All Other; and the 2010 SOC occupations 29-2054 Respiratory Therapy Technicians; 29-2071 Medical Records and Health Information Technicians; and 29-2099 Health Technologists and Technicians, All Other.
Health Information Technologists, Medical Registrars, Surgical Assistants, and Healthcare Practitioners and Technical Workers, All Other	29-9098	This occupation includes the 2018 SOC occupations 29-9021 Health Information Technologists and Medical Registrars; 29-9093 Surgical Assistants; and 29-9099 Healthcare Practitioners and Technical Workers, All Other; and the 2010 SOC occupation 29-9099 Healthcare Practitioners and Technical Workers, All Other.

Source: [BLS](#).

NON-DEGREE HEALTHCARE OCCUPATIONS

Occupation	SOC Code	Description
Home Health Aides	31-1121	Monitor the condition of people with disabilities or chronic illnesses and help them with daily living activities. Often help older adults who need assistance. Under the direction of a nurse or other healthcare practitioner, home health aides may be allowed to give a client medication or to check the client's vital signs.
Personal Care Aides	31-1122	
Nursing Assistants	31-1131	Provide or assist with basic care or support under the direction of onsite licensed nursing staff. Perform duties such as monitoring of health status, feeding, bathing, dressing, grooming, toileting, or ambulation of patients in a health or nursing facility. May include medication administration and other health-related tasks. Includes nursing care attendants, nursing aides, and nursing attendants. Excludes "Home Health Aides" (31-1121), "Personal Care Aides" (31-1122), "Orderlies" (31-1132), and "Psychiatric Aides" (31-1133).
Orderlies	31-1132	Transport patients to areas such as operating rooms or x-ray rooms using wheelchairs, stretchers, or moveable beds. May maintain stocks of supplies or clean and transport equipment. Excludes "Nursing Assistants" (31-1131). Psychiatric orderlies are included in "Psychiatric Aides."
Psychiatric Aides	31-1133	Assist mentally impaired or emotionally disturbed patients, working under direction of nursing and medical staff. May assist with daily living activities, lead patients in educational and recreational activities, or accompany patients to and from examinations and treatments. May restrain violent patients. Includes psychiatric orderlies.
Occupational Therapy Aides	31-2012	Under close supervision of an occupational therapist or occupational therapy assistant, perform only delegated, selected, or routine tasks in specific situations. These duties include preparing patient and treatment room.
Physical Therapist Aides	31-2022	Assist mentally impaired or emotionally disturbed patients, working under direction of nursing and medical staff. May assist with daily living activities, lead patients in educational and recreational activities, or accompany patients to and from examinations and treatments. May restrain violent patients. Includes psychiatric orderlies.
Massage Therapists	31-9011	Perform therapeutic massages of soft tissues and joints. May assist in the assessment of range of motion and muscle strength, or propose client therapy plans.
Dental Assistants	31-9091	Perform limited clinical duties under the direction of a dentist. Clinical duties may include equipment preparation and sterilization, preparing patients for treatment, assisting the dentist during treatment, and providing patients with instructions for oral healthcare procedures. May perform administrative duties such as scheduling appointments, maintaining medical records, billing, and coding information for insurance purposes.
Medical Assistants	31-9092	Perform administrative and certain clinical duties under the direction of a physician. Administrative duties may include scheduling appointments, maintaining medical records, billing, and coding information for insurance purposes. Clinical duties may include taking and recording vital signs and medical histories, preparing patients for examination, drawing blood, and administering medications as directed by physician. Excludes "Physician Assistants."
Medical Equipment Preparers	31-9093	Prepare, sterilize, install, or clean laboratory or healthcare equipment. May perform routine laboratory tasks and operate or inspect equipment.

Source: [BLS](#).

NON-DEGREE HEALTHCARE OCCUPATIONS

Occupation	SOC Code	Description
Medical Transcriptionists	31-9094	Transcribe medical reports recorded by physicians and other healthcare practitioners using various electronic devices, covering office visits, emergency room visits, diagnostic imaging studies, operations, chart reviews, and final summaries. Transcribe dictated reports and translate abbreviations into fully understandable form. Edit as necessary and return reports in either printed or electronic form for review and signature, or correction.
Pharmacy Aides	31-9095	Record drugs delivered to the pharmacy, store incoming merchandise, and inform the supervisor of stock needs. May operate cash register and accept prescriptions for filling.
Phlebotomists	31-9097	Draw blood for tests, transfusions, donations, or research. May explain the procedure to patients and assist in the recovery of patients with adverse reactions.
Healthcare Support Workers, All Other	31-9099	All healthcare support workers not listed separately.

Source: [BLS](#).



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