

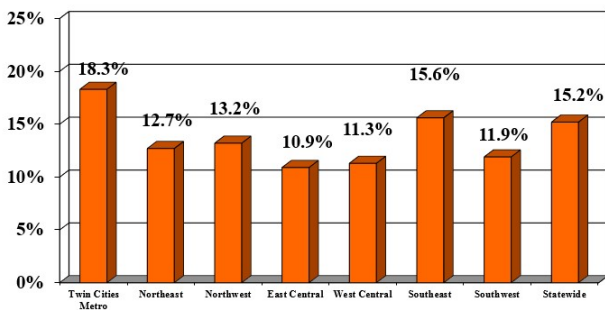
WORKFORCE DATA

LeadingAge Minnesota collects information from a variety of sources to better-understand our state's aging service workforce challenges and operating environment. Since 2014, regardless of line of business or geographic region, workforce pressures are reported as the top operational challenge for our membership.

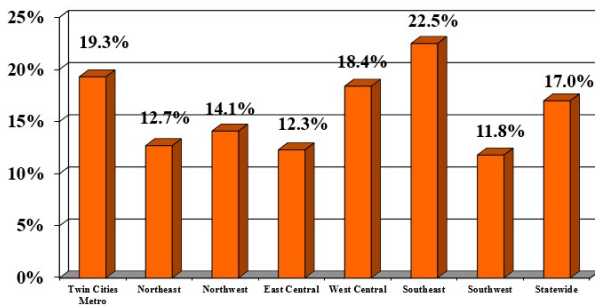
VACANCIES

Minnesota care centers, senior housing communities, adult day centers and community-based service providers report notable increases in the number of unfilled open positions – particularly direct caregivers.

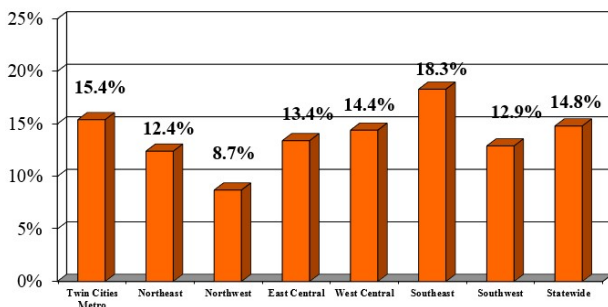
Care Center RN Vacancy Rate Highest in Metro Area



Care Center LPN Vacancy Rate Highest in Southeast Minnesota



Care Center Nursing Assistant Vacancy Rate Highest in Southeast Minnesota

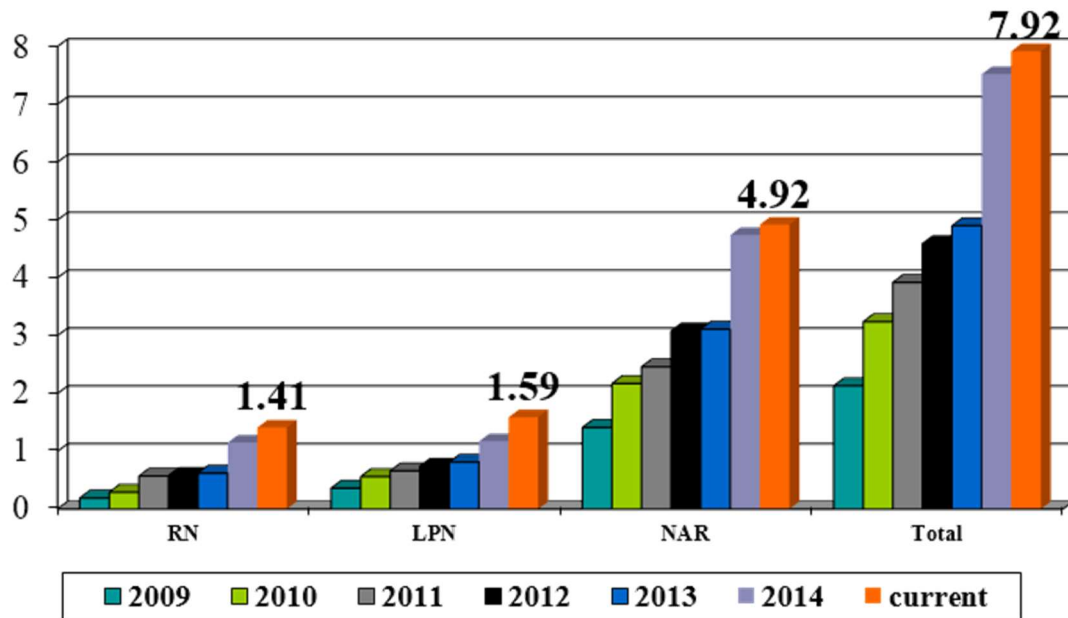


2,892

Open nursing and nursing assistant positions in Minnesota care centers

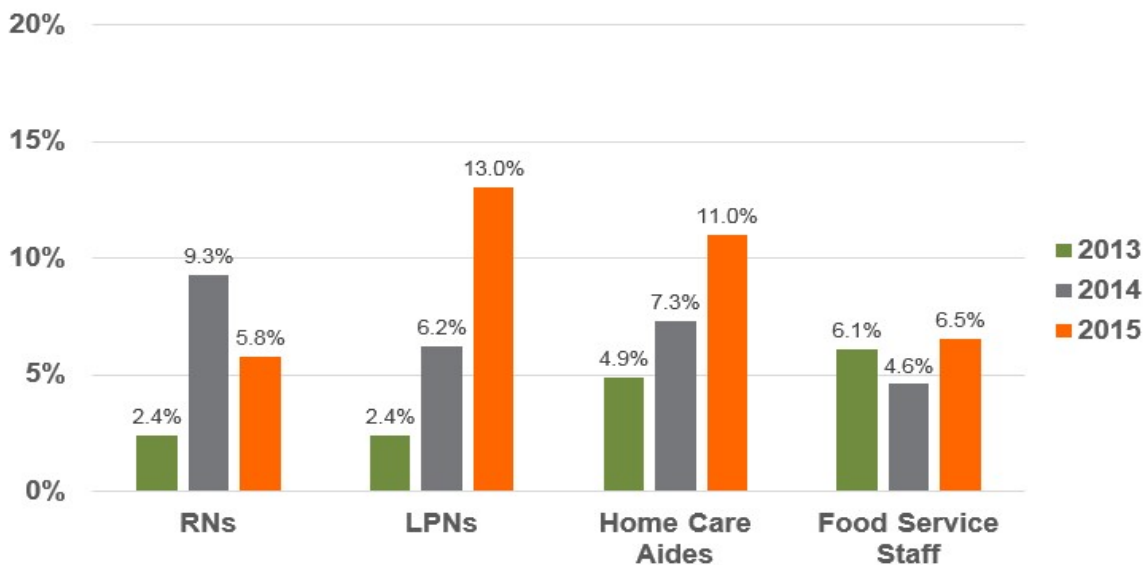
Source: Long-Term Care Imperative 2016 Payment Reform Benchmark Survey

Average Care Center has 7.9 Vacant FTE Positions An Increase of 5% over last year



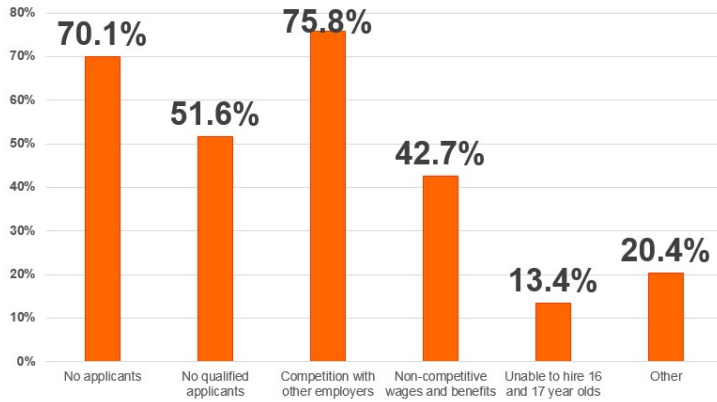
Source: Long-Term Care Imperative 2016 Payment Reform Benchmark Survey

Senior Housing Vacancy Rates Large Increases in Last Year for LPNs and Home Care Aides

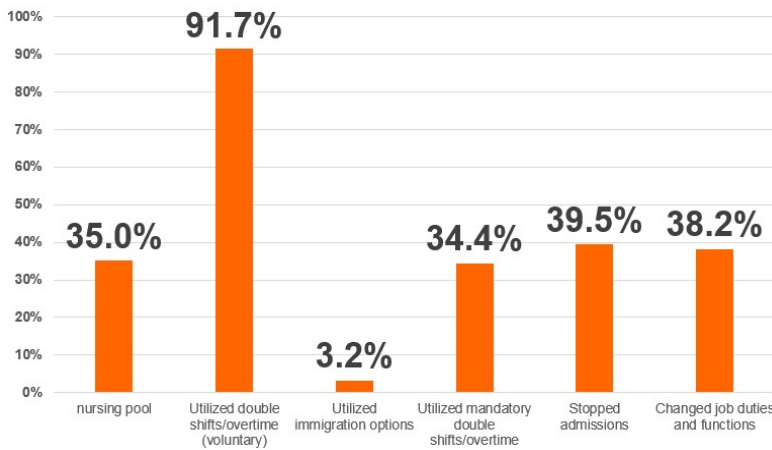


Sources: Long-Term Care Imperative 2016 Housing-with-Services Workforce Legislative Survey

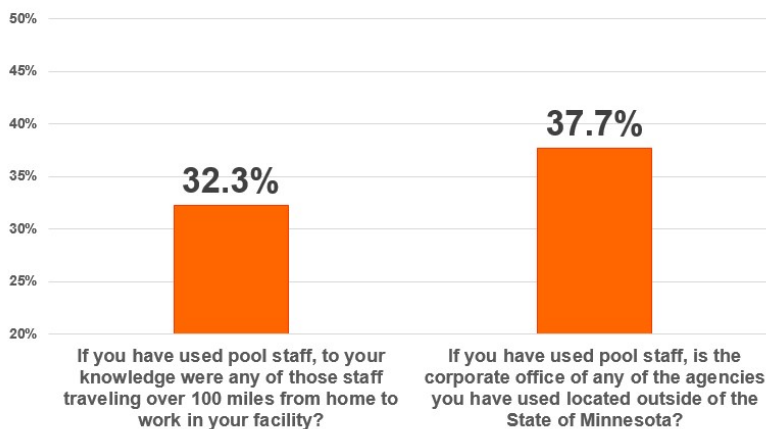
Reasons Given for Vacant Positions



Strategies to Maintain Staffing



Pool Agency Staffing



Source: Long-Term Care Imperative 2016 Payment Reform Benchmark Survey

PROJECTIONS

Direct care team members provide an estimated 70-80 percent of the paid hands-on service to older adults.

Minnesota's Occupational growth projections from 2010-2020 show staggering job growth:

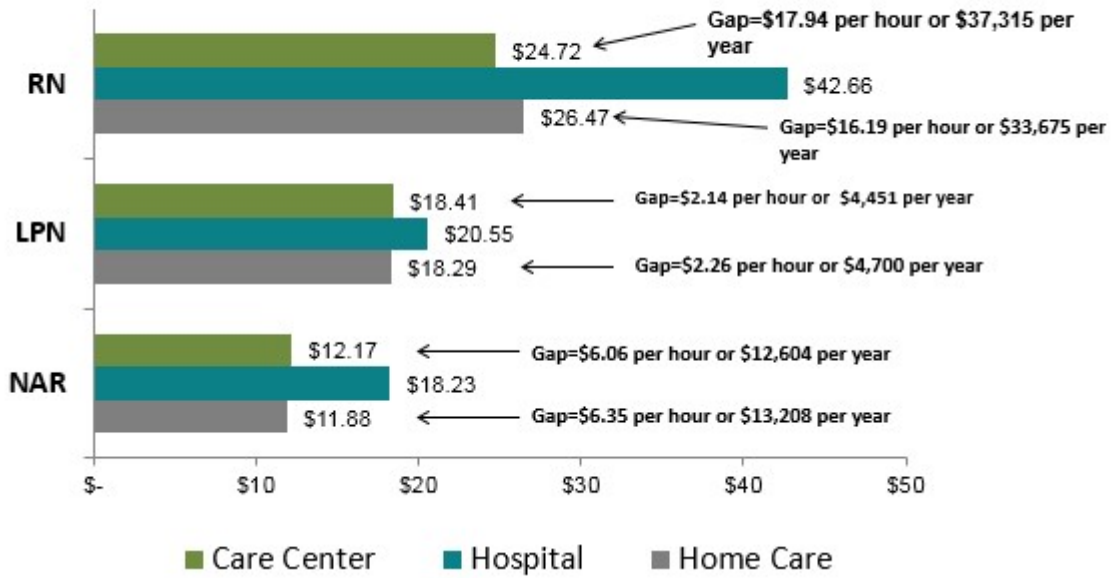
- 62% Personal Care Aides
- 54% Home Health Aides
- 46% Direct Caregivers

Minnesota's Direct Care Workforce includes 112,620+ people:

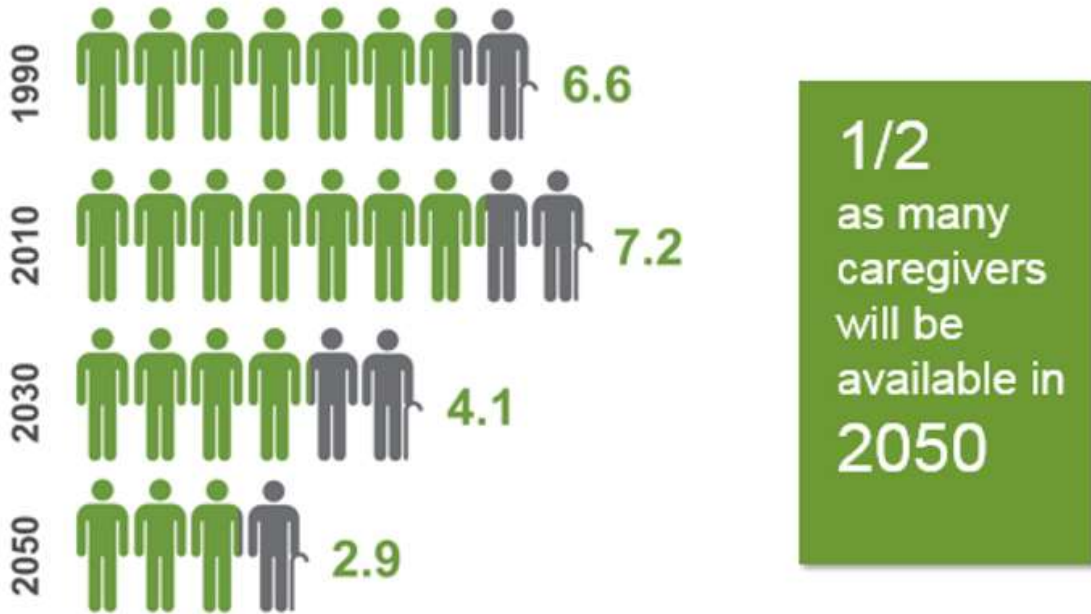
- 49,210 Personal Care Aides
- 33,790 Home Health Aides
- 29,620 Nursing Assistants

Source: PHInternational.org

Senior Living Workers Underpaid in the Marketplace



Sources: 2013 LTC Imperative Salary Survey and 2013 MN Health Care Cost Information Service Hospital Salary Data



Ratio of Potential Caregivers to Those Needing Care¹

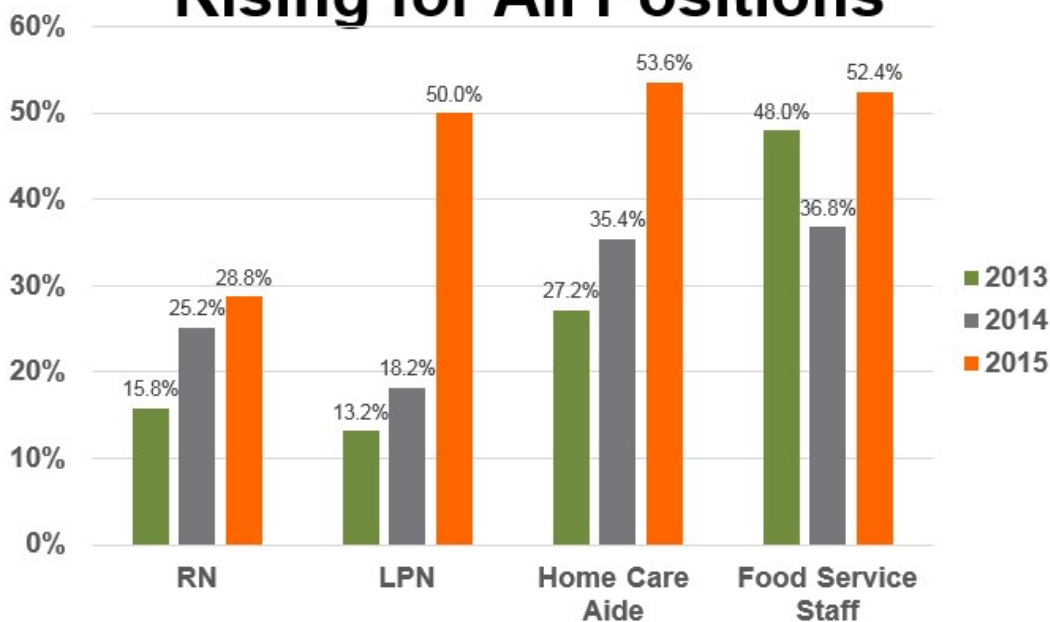
1. Ratio of # people in most common caregiving age (45-64) to those at most risk for needing care (80+)

Source: AARP PPI "The aging of the baby boom and the growing care gap: A look at future declines in the availability of family caregivers"

TURNOVER

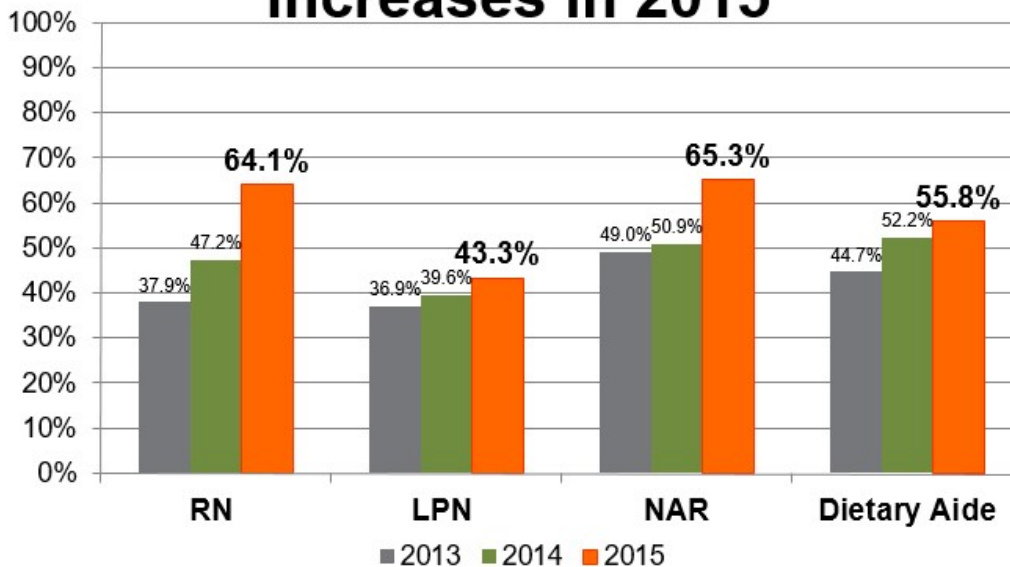
Turnover continues to climb in key positions and across the aging services spectrum of services.

Senior Housing Staff Turnover Rising for All Positions



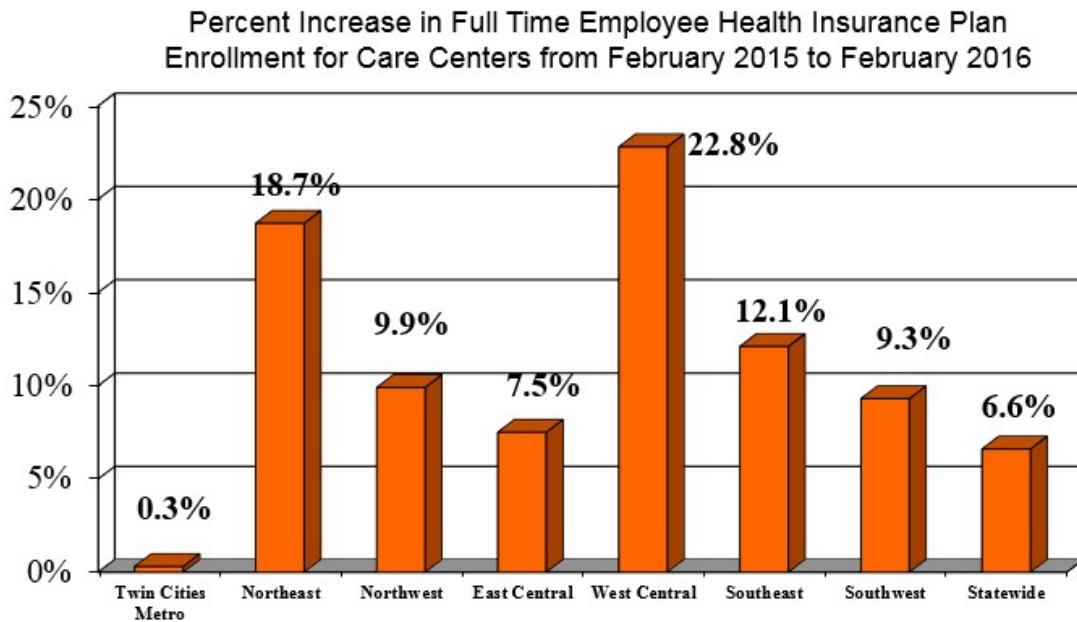
Source: Long-Term Care Imperative 2016 Housing-with-Services Workforce Legislative Survey

Care Center Staff Turnover Increases in 2015



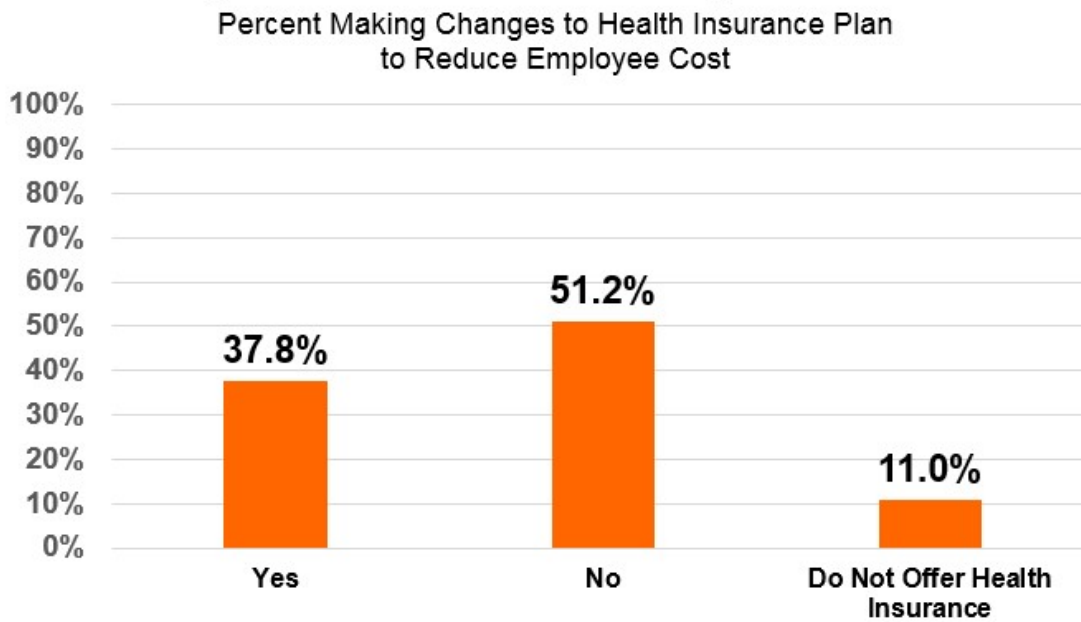
Source: Long-Term Care Imperative 2016 Payment Reform Benchmark Survey

Health Insurance Enrollment Increased by more than 1,200 People from February 2015 to February 2016



Source: Long-Term Care Imperative 2016 Payment Reform Benchmark Survey

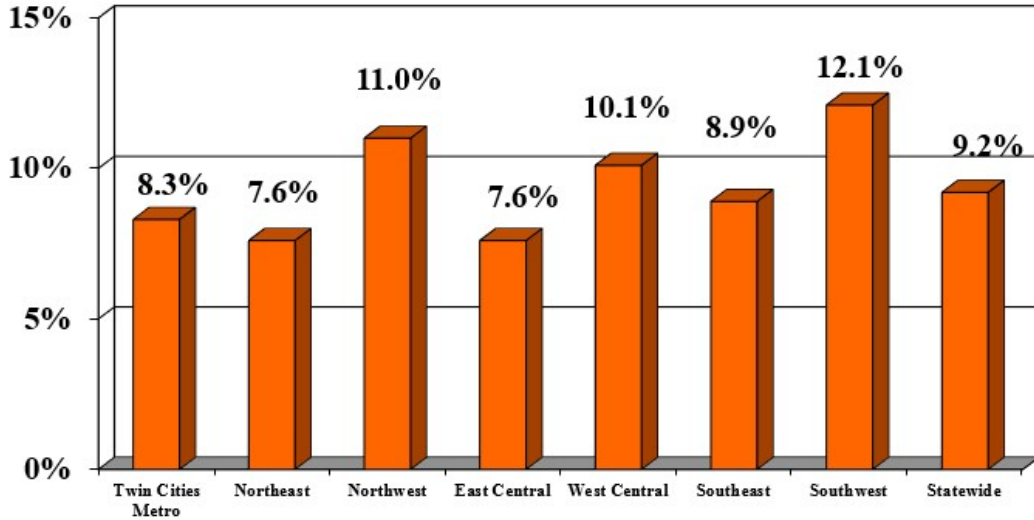
Health Insurance Benefits Improved in Many Cases



Sources: Long-Term Care Imperative 2016 Housing-with-Services Workforce Legislative Survey

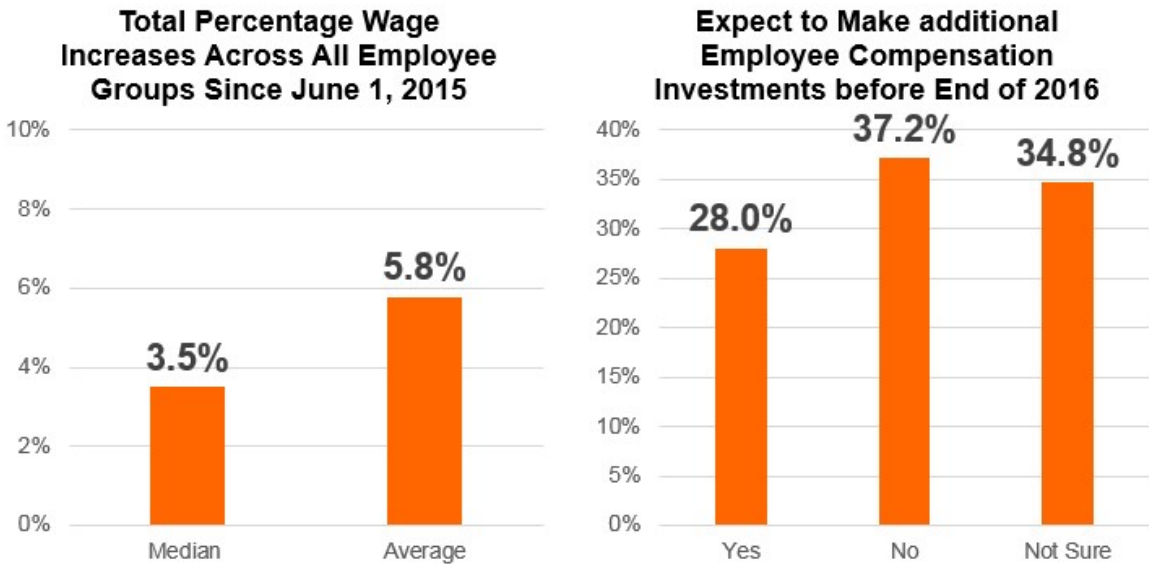
Average Care Center Wage Spending Increase for All Staff Since VBR Passed Exceeds 9%

Percent Increase in Nursing Facility Spending on Wages from June 2015 to January 2016



Source: Long-Term Care Imperative 2016 Payment Reform Benchmark Survey

Senior Housing Wage Increases More than half may provide more later in 2016



Source: Long-Term Care Imperative 2016 Housing-with-Services Workforce Legislative Survey