

OREGON COMMUNITY COLLEGE BSN: SUPPLY AND DEMAND ANALYSIS AND RESULTS

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Extent to which the CCB degree addresses a substantial workforce need, including high demand, well paid occupations and key sectors



Strongest Case

Extent to which the CCB degree provides access to baccalaureate completion for students who would not otherwise be likely to attain the degree

Elements of Case-making for CCB Degrees

SUPPLY & DEMAND METHODOLOGY

Supply and Demand Analysis Method Using Lightcast

Measures of Supply

IPEDS data on degree conferrals for the selected programs of study

IPEDs data by institutions to examine feeder programs and provide a regional perspective on supply

Lightcast data on worker profiles with a baccalaureate degree



Measures of Demand

Bureau of Labor Statistics (BLS) occupational employment projections and earnings data

Lightcast job postings and earnings data for the occupation

Using Lightcast job postings to estimate demand for employees with a baccalaureate degree or higher

Using Lightcast job postings to analyze skill requirements associated with jobs where a baccalaureate is needed

Current research on Oregon's nursing and healthcare worker shortage suggests:

- Growing need for health care workers, including nurses, who can provide culturally and linguistically responsive care
 - Need to improve the diversity of nurses and other health care providers
 - Need for clear healthcare paths that increase skills, pay and impact
 - Maldistribution” of nurses, with greatest need in rural areas
 - Acute need in behavioral health, long-term care, and community-based health
- *Postsecondary Healthcare Education Shortage in Oregon*. (2023, March 13). <https://www.oregon.gov/highered/research/Documents/SLDS/STUDY-PostsecondaryHealthcareEducationShortageInOregonFinal.pdf>
 - Oregon's Health Care Workforce Needs Assessment 2023. (2023, February). <file:///Users/dbragg/Downloads/health-care-workforce-needs-assessment-report-2023.pdf>
 - *Healthcare Staffing Shortage Task Force Report*. (2022). https://www.aft.org/sites/default/files/media/documents/2022/hc_StaffingTaskforceReport_Nov2022.pdf
 - *The Future of Oregon's Nursing Workforce: Analysis and Recommendations*. (2022). <https://oregoncenterfornursing.org/wp-content/uploads/2022/11/Future-of-Oregon-Nursing-Workforce-Analysis-and-Recommendations.pdf>
 - *Shortage or Maldistribution: Shifting the Conversation about Oregon's Nursing Workforce*. (2019). https://www.oregonpublichealth.org/assets/2019_Slides/OPHA%20Maldistribution%202018%20Allgeyer%20v1.pdf

Selected Research on Oregon Nursing

**OREGON
REGISTERED NURSING (RN)
SUPPLY**

- Oregon has seen steady growth in employed RNs from 2015 to 2021.
- The largest year-to-year increase occurred when more than 2,036 RNs were employed in 2016 than in 2015.
- Since 2015, the state has added an average of 464 RNs per year.



Number Employed Oregon RNs (2015 to 2021) (Lightcast)

ADN-Conferring

Blue Mountain Community College District
Central Oregon Community College District
Chemeketa Community College District
Clackamas Community College District
Clatsop Community College District
Columbia Gorge Community College District
Klamath Community College District
Lane Community College District
Linn-Benton Community College District
Mt Hood Community College District
Oregon Coast Community College District
Portland Community College District
Rogue Community College District
Southwestern Oregon Community College District
Sumner College
Treasure Valley Community College District
Umpqua Community College District

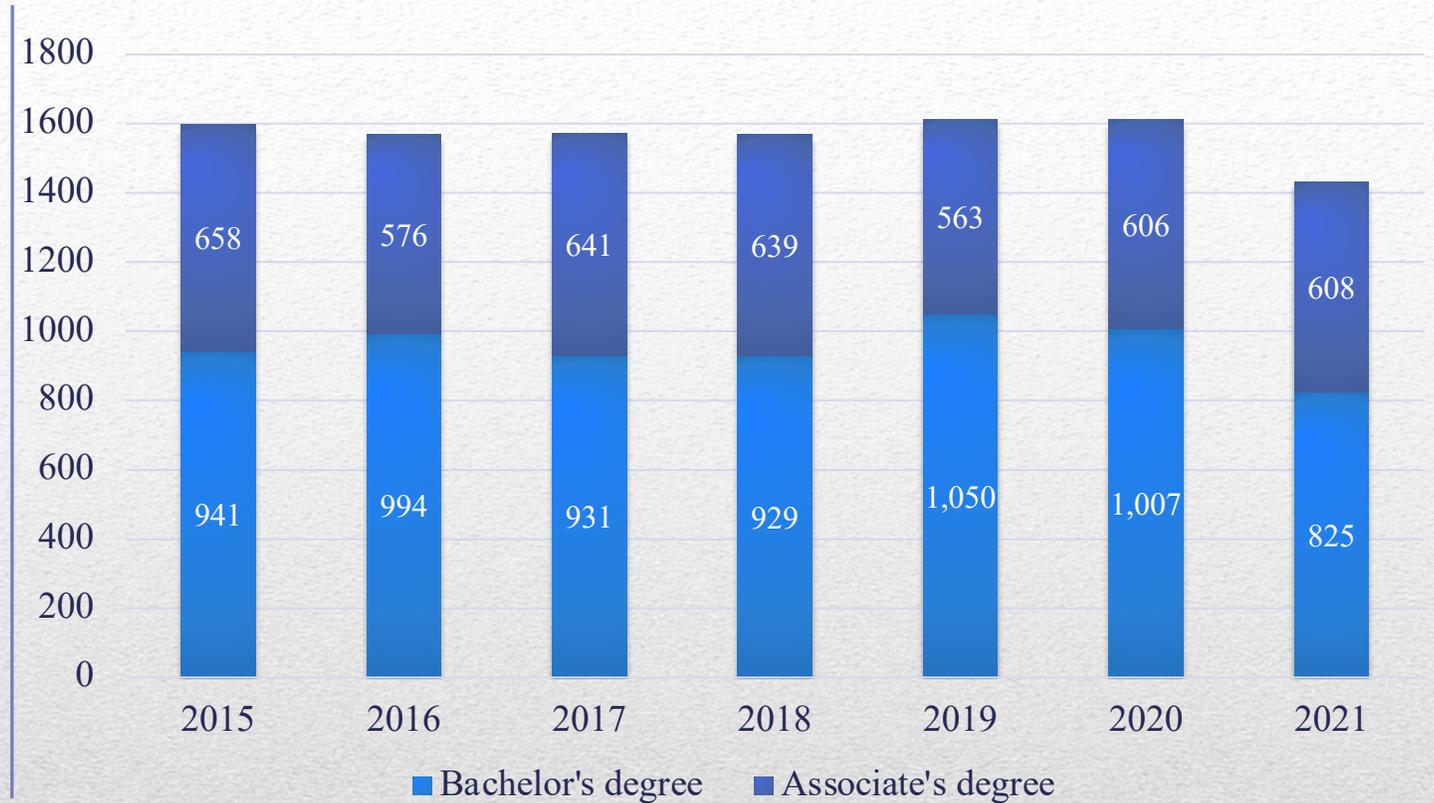
BSN-Conferring

Bushnell University
George Fox University
Linfield University-Online and Continuing Ed
Linfield University-School of Nursing
Oregon Health & Science University
University of Portland
Warner Pacific University

	Public
	Private for Profit
	Private Not for Profit

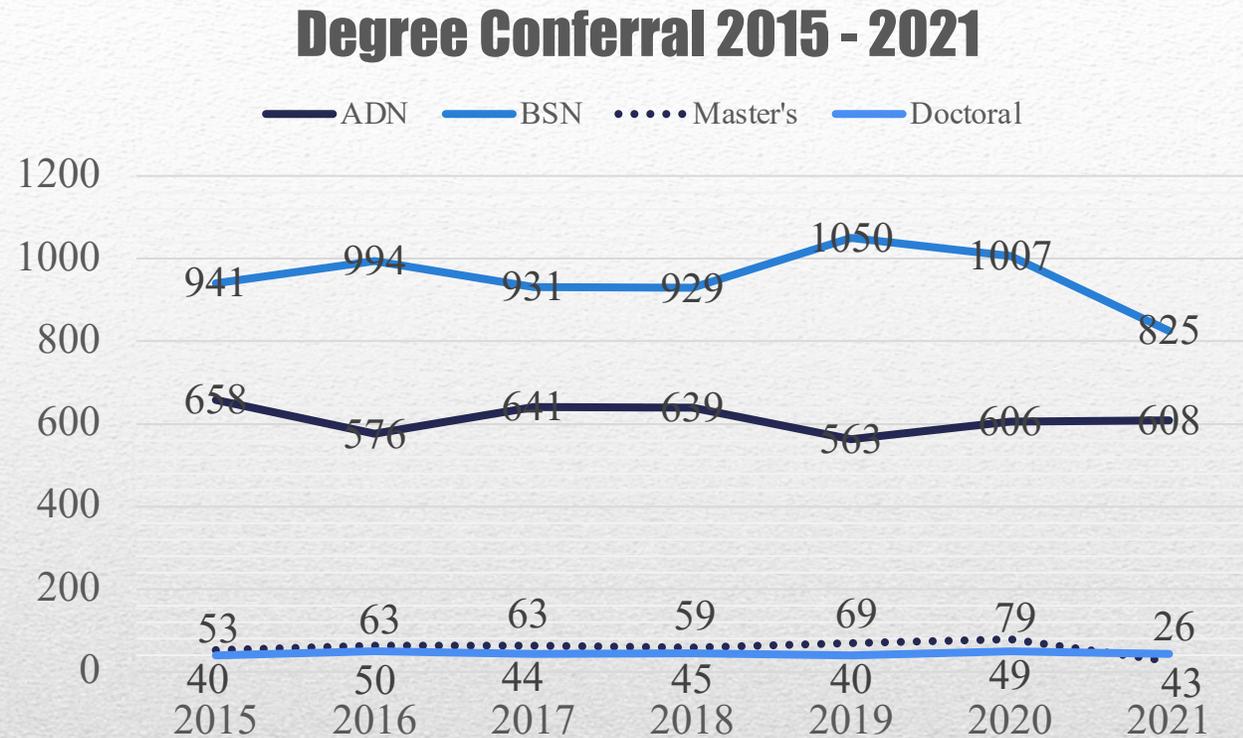
Oregon Community Colleges & Universities with RN Graduates (IPEDS)

- The total number of RN grads grew slightly from 1,599 in 2015 to 1,613 in 2020, then fell to 1,433 in 2021.
- Over the entire 7-year period, BSN grads exceeded ADN grads even in 2021 when BSNs declined by 180.
- The total number of ADN grads fluctuated by 60 to 80 grads one year to the next, leveling off to slightly over 600 grads in 2020 and 2021.



Oregon Registered Nursing (ADN & BSN) Graduates (2015 to 2021) (IPEDS)

- The top 2 lines show the total number of ADN and BSN grads from 2015 to 2021, with a steep decline in BSNs in 2021.
- The total number of master's grads increased from 53 to 79 from 2015 to 2020, with a steep decline to 26 grads in 2021.
- The total number doctoral grads increased from 40 to 49 from 2015 to 2020, with a modest decline to 43 grads in 2021.



Oregon Registered Nursing (ADN & BSN) Graduates (2015 to 2021) (IPEDS)

- Sixteen OR CCs graduated ADN students in 2021, with 11 reporting 21 or more ADN grads.
- From 2015 to 2021, 8 CCs saw growth in ADN grads, 5 saw declines, and 2 had no change.
- Sumner College had the largest increase in ADN grads from 2015 to 2021 (204%), reaching 70 grads in 2021.
- Sumner College the fastest growing and 2nd largest ADN program in Oregon.

ADN-Conferring Colleges*	ADN Grads 2021	% Change in ADN Grads (2015-2021)
Lane	82	30%
Sumner (Private For Profit)	70	204%
Mt. Hood	63	-9%
Central Oregon	47	18%
Umpqua	46	15%
Linn-Benton	45	0%
Southwestern	42	91%
Rogue	33	18%
Portland	32	-58%
Clackamas	30	-21%
Chemeketa	26	-37%
Clatsop	22	47%

5 more community colleges reported 20 or fewer ADN graduates in 2021.

2021 ADN Graduates and % Change in ADN Conferral from 2015 to 2021 (IPEDS)

- Nearly half (47%) of Oregon BSN grads complete RN degrees at OHSU and another 23% finish at Linfield U-Nursing, accounting for about 70% of all BSN grads in OR.
- Nearly 60% of all BSN degrees are conferred by universities in the Portland area, with more conferrals coming to this metro area with Linfield U-Nursing's new Portland campus.

BSN-Conferring Institutions	BSN Grads 2021	% Change in BSN Grads (2015-2021)
Oregon Health & Science University (OHSU)	384	11%
Linfield U.- School of Nursing	197	1%
Linfield University-Online	67	-50%
George Fox University	60	13%
University of Portland	55	-69%
Warner Pacific University	40	New
Bushnell University	22	New
Concordia University-Portland	0	Closed

2021 BSN Graduates and % Change in BSN Conferral from 2015 to 2021 (IPEDS)

CC ADN Programs

87.6%

BSN Programs

83.0%

Average NCLEX Pass Rate (2021)

- Presently, 4 CCs are ACEN accredited and four more are candidates, meaning 50% of all current CC ADN programs are accredited, and 50% are not.
- Whereas accreditation may not affect ADN graduate employment, it may be a concern if MSN programs require their applicants to have completed BSN degrees from accredited program.

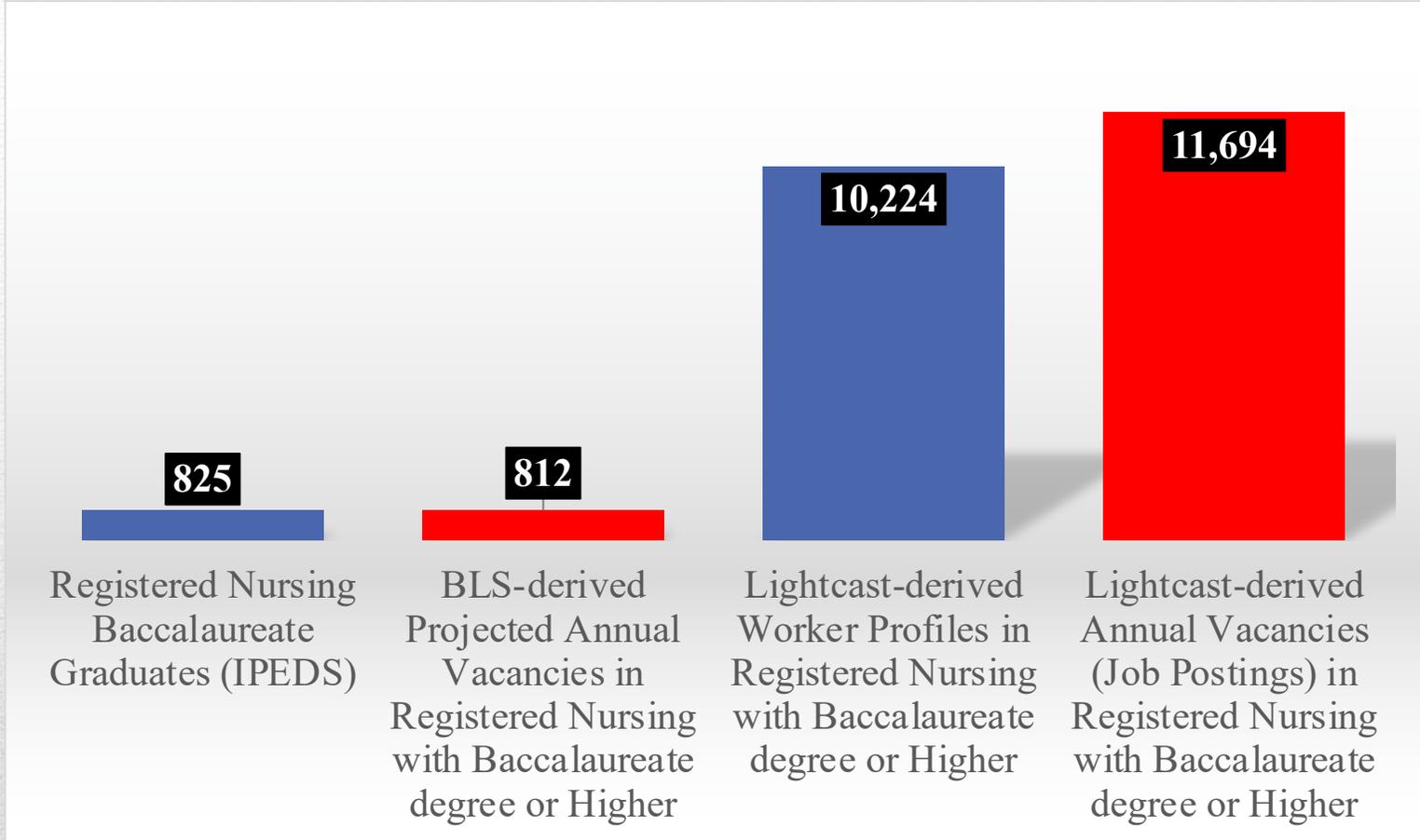
- Central Oregon Community College
- Chemeketa Community College (conditions – follow-up report Spring 2023)
- Clackamas Community College (candidacy, with site visit fall 2023)
- Columbia Gorge Community College
- Linn-Benton Community College (candidacy status)
- Portland Community College (candidacy, with site visit fall 2023)
- Treasure Valley Community College
- Umpqua Community College (candidacy, with site visit fall 2023)

ACEN Accreditation Status

SUPPLY AND DEMAND



Focusing on the BSN specifically, the number of BSN grads and BLS-derived annual vacancies are roughly equivalent, but the Lightcast annual vacancies (i.e., job postings) exceed both BSN grads and BLS-derived annual vacancies by over 14 times.



Supply and Demand Indicators for Oregon BSN (Lightcast – 2022)

- Regional supply and demand analysis shows unmet demand for BSNs in most CC districts using BLS or Lightcast.
- Demand for BSNs is evident in many CC districts with no BSN programs.

CC District	BSN Grads in CC District (IPEDES)	BLS projected annual vacancies for BSN in CC District	Lightcast Annual Vacancies for the BSN in CC District
Mt. Hood	676	288	4,382
Portland	0	118	1,630
Clackamas	0	78	1161
Chemeketa	127	96	1,508
Rogue	0	86	1,007
Lane	22	39	584
Central Oregon	0	28	194
Umpqua	0	13	123
Blue Mountain	0	12	208
Clatsop	0	12	103
Southwestern	0	12	162
Linn-Benton	0	10	235

The remaining CC Districts show fewer than 10 BLS-derived annual vacancies in Registered Nurses with Bachelor's or higher degrees.

Oregon CC Districts with Largest Demand for BSNs (BLS & Lightcast)

- From 2015 to 2022, regional supply and demand shows unmet demand for BSNs in all CC districts, with demand for RNs increasing in 3 districts: Rogue, Southwestern, and Tillamook Bay.
- However, we see slightly lower demand for BSNs in many districts, with sharpest decline in Treasure Valley, Lane, & Central OR.

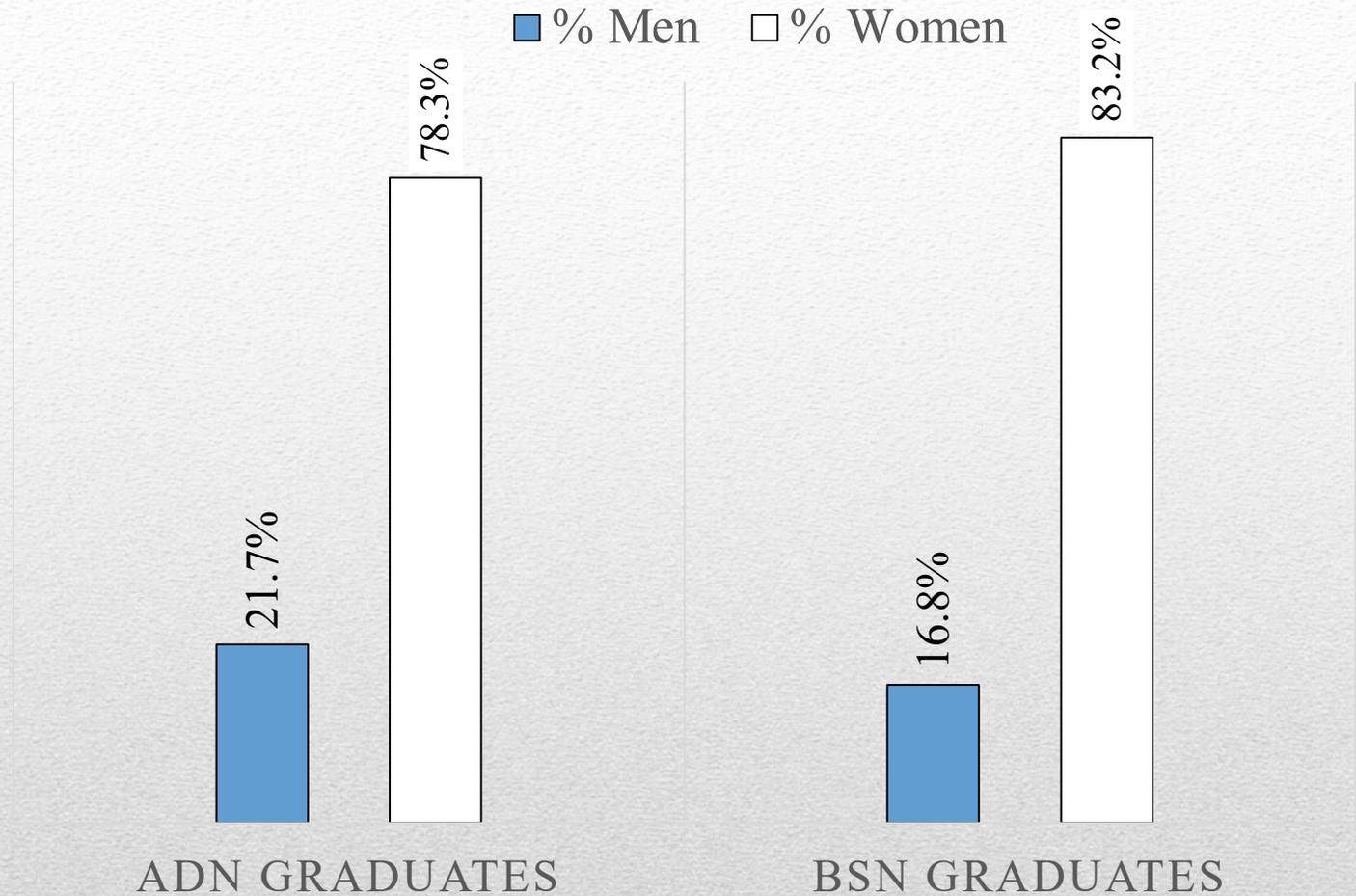
CC Districts	Total Unique Postings 2015 Bachelor's or Higher in CC District	% 2015 Unique Postings Requiring BSN in CC District	Change in Job Postings Requiring BSN from 2015 to 2022 in CC District
Mt. Hood	3,168	26%	-3%
Portland	642	40%	-10%
Clackamas	880	45%	-14%
Chemeketa	779	34%	-5%
Rogue	642	31%	10%
Lane	908	36%	-20%
Central Oregon	357	33%	-18%
Umpqua	191	22%	0%
Blue Mountain	183	26%	-3%
Clatsop	110	40%	-4%
Southwestern	63	20%	7%
Linn-Benton	222	18%	-10%
Treasure Valley	195	55%	-36%
Oregon Coast	54	12%	-9%
Klamath	45	17%	-9%
Tillamook Bay	16	13%	4%

OR CC District Demand for BSN 2015 to 2022 (Lightcast)

EQUITY ANALYSIS

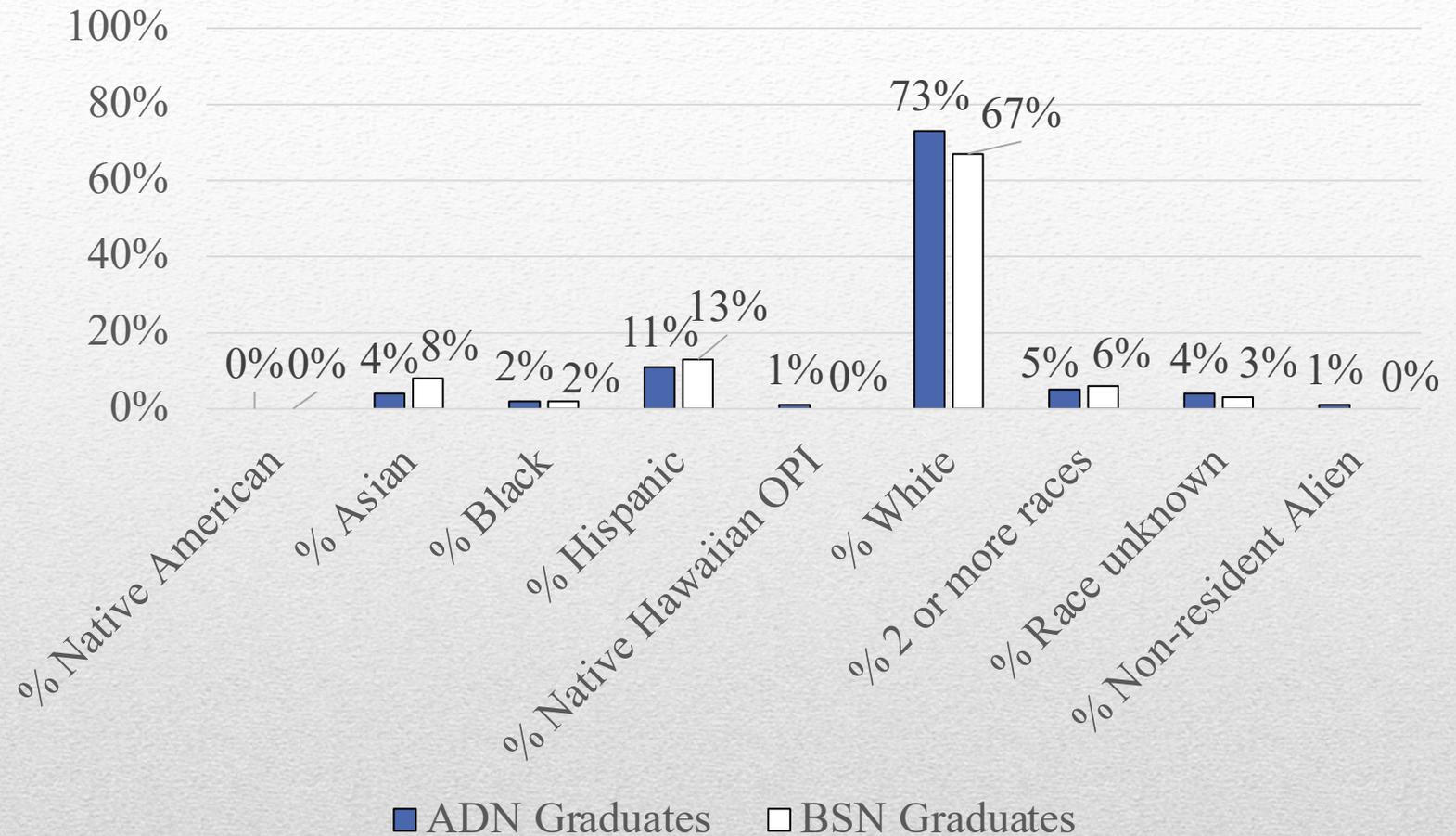
- Graduate demographics (state and regional) – race & gender
 - Geographic access – education deserts impacting place-bound RNs
 - Student tuition & fees gap – 3 models
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The majority of ADN and BSN graduates are women. However, men make up about 5% more of the ADN graduate group than the BSN graduate group.



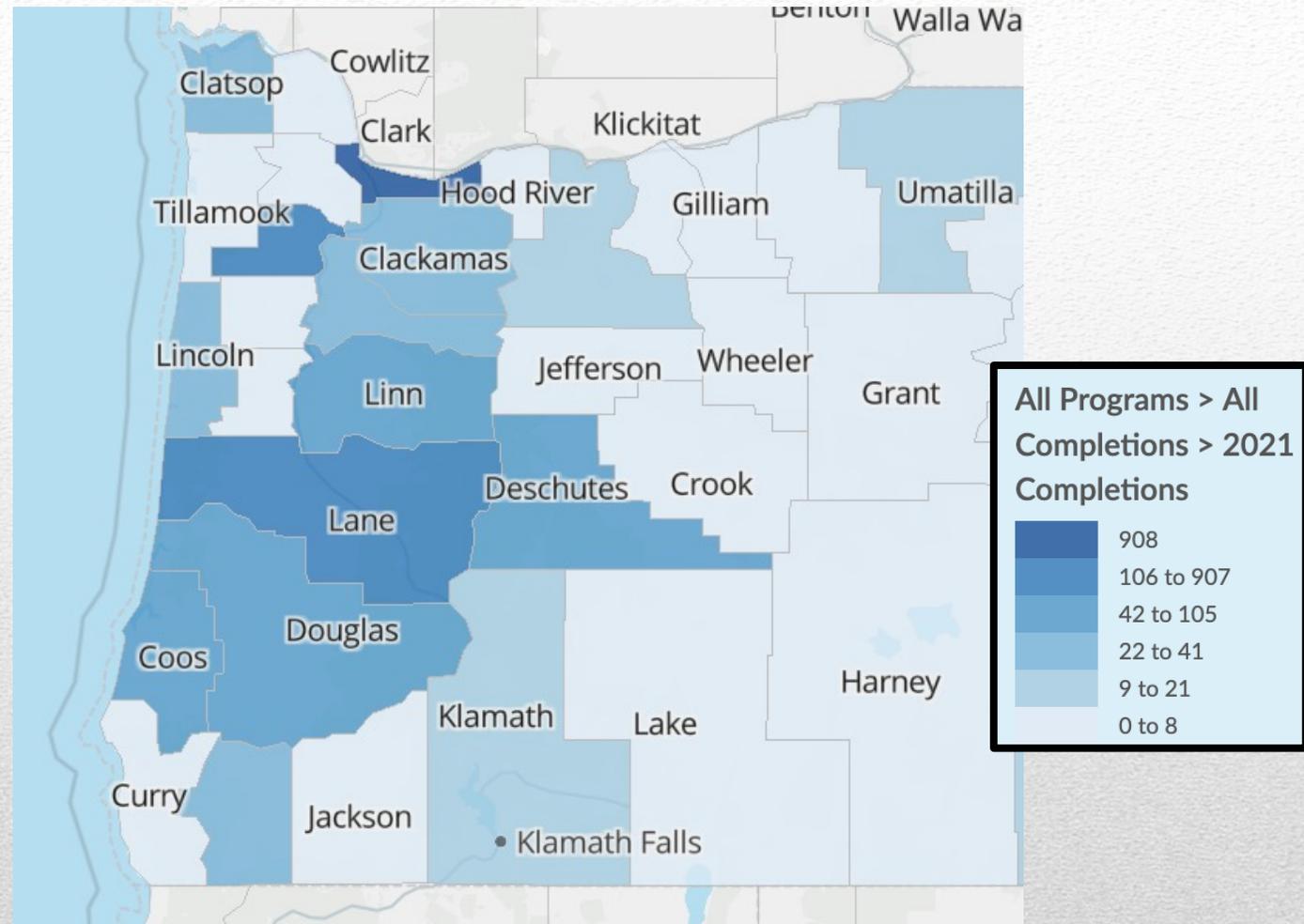
Gender of ADN and BSN Grads (2021)

ADN and BSN grads are distributed fairly similarly on race. However, white grads make up a slightly higher percentage of the overall ADN grad group and Asian grads make up a slightly larger percentage of the BSN grad group.



Race of ADN and BSN Grads (2021)

- There is a concerning “maldistribution” of RN programs in the state (Oregon Center for Nursing, 2019).
- Large swaths of Oregon had 21 or less RN graduates in 2021 (and earlier years).
- Place-bound RNs have limited or no physical access to BSN programs except via long commutes (100 or more miles) or online education.



RN Program Locations (Lightcast)

Observations about ADN & BSN Grads by Race and CC District and University (2021)

- Six CCs have a higher percentage Hispanic grads than the highest university BSN program, at 16%. These colleges are:
 - Blue Mountain (31%)
 - Oregon Coast (26%)
 - Klamath (22%)
 - Clackamas (21%)
 - Linn-Benton (20%)
 - Columbia Gorge (20%)
- Mt. Hood, Sumner, and Warner Pacific report 10-11% Black grads, with zero or very small % Black grads at all other CCs and universities.
- Only 6 indigenous RN grads in the state in 2021 (3 CC, 3 university).

More regional demographic comparisons available upon request

**Public Community College
Annual Tuition
\$5,013 - \$6,111**

**Private For
Profit
Annual
Tuition
\$18,943**

**Public
University
Annual
Tuition
\$21,998**

**Private Not For Profit
University Annual
Tuition
\$14,040 - \$49,864**

Public CC (examples):				
Mt. Hood	\$5,013			
Umpqua	\$5,282			
Lane	\$5,333			
Central Oregon	\$6,111			
Private For Profit				
Sumner		\$18,943		
Public University:				
OHSU			\$21,998	
Private Not For Profit:				
Linfield U-Online				\$14,040
George Fox University				\$38,520
Linfield U-School of Nursing				\$48,145
University of Portland				\$49,864

FY 2022 Institutional Annual Tuition (IPEDS)



Public CC (examples):				
Mt. Hood	\$5,013			
Umpqua	\$5,282			
Lane	\$5,333			
Central Oregon	\$6,111			
Private For Profit				
Sumner		\$18,943		
Public University:				
OHSU			\$21,998	
Private Not For Profit:				
Linfield U-Online				\$14,040
George Fox University				\$38,520
Linfield U-School of Nursing				\$48,145
University of Portland				\$49,864

Total Tuition & Fees OHSU
BS Programs for RNs:

- Online = \$13,201
- Online/CC transition = \$11,037

FY 2022 Institutional Annual Tuition (IPEDS)

Model 1

Same tuition
at upper &
lower levels

**\$5,013 - \$6,111
(Annual)**

Model 2

Up to 150%
lower level
tuition at
upper level

**\$7,520 - \$9,167
(Annual)**

Model 3

Similar tuition
as public
university

**\$11,037 – \$13,201
(Total BS for RNs
program OHSU)**

Three CCB Tuition Models

Your Thoughts





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