

Certified Nursing Assistants and Certified Home Health Aides Labor Market Information Report City College of San Francisco

Prepared by the San Francisco Bay Center of Excellence
for Labor Market Research
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Recommendation

Based on all available data, there appears to be an undersupply of Certified Nursing Assistants and Certified Home Health Aides compared to the demand for this cluster of occupations in the Bay region and in the Mid-Peninsula sub-region (San Francisco and San Mateo Counties). There is a projected annual gap of about 33,431 students in the Bay region and 8,672 students in the Mid-Peninsula Sub-Region.

Introduction

This report also provides student outcomes data on employment and earnings for TOP 1230.30-Certified Nurse Assistant programs in the state and region. It is recommended that these data be reviewed to better understand how outcomes for students taking courses on this TOP code compare to potentially similar programs at colleges in the state and region, as well as to outcomes across all CTE programs at City College of San Francisco (CCSF) and in the region.

This report profiles Certified Nursing Assistants and Certified Home Health Aides in the 12 county Bay region and in the Mid-Peninsula sub-region for a proposed new program at City College of San Francisco.

- **Nursing Assistants (31-1014 / 31-1131):** Provide basic patient care under direction of nursing staff. Perform duties such as feed, bathe, dress, groom, or move patients, or change linens. May transfer or transport patients. Includes nursing care attendants, nursing aides, and nursing attendants. Excludes “Home Health Aides” (31-1011), “Orderlies” (31-1015), “Personal Care Aides” (39-9021), and “Psychiatric Aides” (31-1013).

 - Entry-Level Educational Requirement: Postsecondary nondegree award
 - Training Requirement: None
 - Percentage of Community College Award Holders or Some Postsecondary Coursework: 41%
- **Home Health Aides / Home Health and Personal Care Aides (31-1011 / 31-1128):** Provide routine individualized healthcare such as changing bandages and dressing wounds, and applying topical medications to the elderly, convalescents, or persons with disabilities at the patient’s home or in a care facility. Monitor or report changes in health status. May also provide personal care such as bathing, dressing, and grooming of patient.

 - Entry-Level Educational Requirement: High school diploma or equivalent
 - Training Requirement: Short-term on-the-job training
 - Percentage of Community College Award Holders or Some Postsecondary Coursework: 41%

Occupational Demand

Table 1. Employment Outlook for Certified Nursing Assistants and Certified Home Health Aides in Bay Region

Occupation	2019 Jobs	2024 Jobs	5-Yr Change	5-Yr % Change	5-Yr Openings	Average Annual Openings	25% Hourly Wage	Median Hourly Wage
Nursing Assistants	21,489	23,739	2,250	10%	14,886	2,977	\$16.49	\$19.12
Home Health Aides / Home Health and Personal Care Aides	138,718	171,136	32,418	23%	153,003	30,601	\$12.69	\$14.14
TOTAL	160,207	194,875	34,668	22%	167,889	33,578	\$13.20	\$14.81

Source: EMSI 2020.3

Bay Region includes: Alameda, Contra Costa, Marin, Monterey, Napa, San Benito, San Francisco, San Mateo, Santa Clara, Santa Cruz, Solano and Sonoma Counties

Table 2. Employment Outlook for Certified Nursing Assistants and Certified Home Health Aides in Mid-Peninsula Sub-Region

Occupation	2019 Jobs	2024 Jobs	5-Yr Change	5-Yr % Change	5-Yr Openings	Average Annual Openings	25% Hourly Wage	Median Hourly Wage
Nursing Assistants	4,438	4,979	541	12%	3,170	634	\$17.79	\$20.65
Home Health Aides / Home Health and Personal Care Aides	36,848	45,128	8,280	22%	40,188	8,038	\$12.75	\$14.32
TOTAL	41,286	50,107	8,821	21%	43,358	8,672	\$13.30	\$15.00

Source: EMSI 2020.3

Mid-Peninsula Sub-Region includes: San Francisco and San Mateo Counties

Job Postings in Bay Region and Mid-Peninsula Sub-Region

Table 3. Number of Job Postings by Occupation for latest 12 months (October 2019 - September 2020)

Occupation	Bay Region	Mid-Peninsula Sub-Region
Nursing Assistants	5,206	1,118
Home Health Aides	2,599	445
TOTAL	7,805	1,563

Source: Burning Glass

Table 4a. Top Job Titles for Certified Nursing Assistants and Certified Home Health Aides for latest 12 months (October 2019 - September 2020) Bay Region

Common Title	Bay	Common Title	Bay
Certified Nursing Assistant	477	Home Health Aide Home Health Aide	64
Behavior Technician	457	Medication Technician	59
Home Health Aide	255	Caregiver/Home Health Aide	52
Home Care Aide	180	Behavior Aide	52
Certified Nursing Assistant Certified Nursing Assistant	171	Certified Home Health Aide	46
Certified Nursing Assistant - Certified Nursing Assistant	171	Direct Support Professional Dsp	45
Caregiver/Certified Nursing Assistant Certified Nursing Assistant	121	Hospice Aide	44
Direct Support Professional	110	Home Healthcare Aide/Caregiver	39
Aba Behavior Technician	81	Home Health Aide/Home Health Aide	37
Patient Care Technician	79	Home Health Aide - Caregiver	37
Patient Care Technician Pct	76	Patient Care Technician - Pct	36
Nursing Assistant	66	Certified Nursing Assistant/Certified Nursing Assistant	34

Table 4b. Top Job Titles for Certified Nursing Assistants and Certified Home Health Aides for latest 12 months (October 2019 - September 2020) Mid-Peninsula Sub-Region

Common Title	Mid-Peninsula	Common Title	Mid-Peninsula
Behavior Technician	124	Certified Hospital Attendant	13
Certified Nursing Assistant	105	Patient Care Associate	11
Home Health Aide	79	Patient Care Assistant	10
Behavior Aide	46	Direct Support Professional Dsp	10
Certified Nursing Assistant Certified Nursing Assistant	27	Patient Care Technician - Grade	9
Certified Nursing Assistant - Certified Nursing Assistant	25	Hospice Home Health Aide	9
Home Care Aide	21	Pv Clinical Associate	8
Patient Care Technician	16	Patient Care Technician Pct	8
Caregiver/Certified Nursing Assistant Certified Nursing Assistant	16	Convention Aide	8
Scheduler Home Health	15	Certified Home Health Aide	8
Nursing Assistant	15	Medication Technician	7
Patient Care Assistant Pca	14	Medication Aide	7
Hospice Aide	13	Med Technician	7
Direct Support Professional	13	Home Health Aide Home Health Aide	7

Source: Burning Glass

Industry Concentration

Table 5. Industries hiring Certified Nursing Assistants and Certified Home Health Aides in Bay Region

Industry – 6 Digit NAICS (No. American Industry Classification) Codes	Jobs in Industry (2019)	Jobs in Industry (2024)	% Change (2019-24)	% Occupation Group in Industry (2019)
Services for the Elderly and Persons with Disabilities (624120)	100,834	129,971	29%	63%
Home Health Care Services (621610)	11,224	13,399	19%	7%
Private Households (814110)	8,374	7,956	-5%	5%
Nursing Care Facilities (Skilled Nursing Facilities) (623110)	7,580	7,840	3%	5%
Assisted Living Facilities for the Elderly (623312)	6,732	7,837	16%	4%
Continuing Care Retirement Communities (623311)	4,562	5,699	25%	3%
General Medical and Surgical Hospitals (622110)	3,812	3,754	-2%	2%
Residential Intellectual and Developmental Disability Facilities (623210)	3,129	3,408	9%	2%
Hospitals (Local Government) (903622)	1,690	1,835	9%	1%

Source: EMSI 2020.3

Table 6. Top Employers Posting Jobs for Certified Nursing Assistants and Certified Home Health Aides in Bay Region and Mid-Peninsula Sub-Region (October 2019 - September 2020)

Employer	Bay	Employer	Bay	Employer	Mid-Peninsula
Careinhomes	255	1 Plus 1 Cares	61	Sunrise Senior Living, Inc.	52
Sunrise Senior Living, Inc.	171	Opya Inc	57	Opya, Inc	45
Stanford Health Care	168	Visiting Angels	54	University California	43
HCR ManorCare	133	Telecare Corporation	54	UC San Francisco Medical Center	42
Davita Incorporated	133	Elwyn	54	Sutter Health	42
Interim Healthcare	131	American Baptist Homes West	54	Opya Inc	40

Gateway Learning Corporation	123	Kaiser Permanente	53	Gateway Learning Corporation	32
Brookdale Senior Living	115	Sutter Medical Center	51	Genentech	30
Kindred Healthcare Incorporated	93	Elder Care Alliance	51	HCR ManorCare	29
Sutter Health	85	Sutter Health Sacramento Sierra Region	48	Dignity Health	27
Bridge Home Health Hospice	81	United Health Systems	47	Sutter Medical Center	24
Fresenius	71	Kadiant	46	Sutter Health Sacramento Sierra Region	24
Opya, Inc	66	Butterfly Effects	46	Careinhomes	24
Dignity Health	64	University California	44	Davita Incorporated	23
Covenant Care	64	Genentech	44	Hospice By The Bay	22
Home Instead Senior Care	61	UC San Francisco Medical Center	42	Department of Veterans Affairs	19
Brightstar Care	61	Quality Elderly Care	42	Kaiser Permanente	18

Source: Burning Glass

Educational Supply

There are two (2) community colleges in the Bay Region issuing 147 awards on average annually (last 3 years ending 2018-19) on TOP 1230.30-Certified Nurse Assistant. There are no colleges in the Mid-Peninsula Sub-Region issuing awards on average annually (last 3 years) on this TOP code.

Table 7. Community College Awards on TOP 1230.30-Certified Nurse Assistant in Bay Region

College	Sub-Region	Certificate Low Unit	Total
Santa Rosa	North Bay	97	97
Solano	North Bay	50	50
Total Bay Region		147	147
Total Mid-Peninsula Sub-Region		0	0

Source: Data Mart

Note: The annual average for awards is 2016-17 to 2018-19.

Gap Analysis

Based on the data included in this report, there is a large labor market gap in the Bay region with 33,578 annual openings for Certified Nursing Assistants and Certified Home Health Aides and 147 annual (3-year average) awards for an annual undersupply of 33,431 students. In the Mid-Peninsula Sub-Region, there is also a gap with 8,672 annual openings and no annual (3-year average) awards for an annual undersupply of 8,672 students.

Student Outcomes

Table 8. Four Employment Outcomes Metrics for Students Who Took Courses on TOP 1230.30-Certified Nurse Assistant

2017-18	Bay All CTE Programs	CCSF All CTE Programs	State 1230.30	Bay 1230.30	Mid-Peninsula 1230.30	CCSF 1230.30
% Employed Four Quarters After Exit	74%	66%	72%	72%	n/a	n/a
Median Quarterly Earnings Two Quarters After Exit	\$10,550	\$12,765	\$6,388	\$7,734	n/a	n/a
Median % Change in Earnings	46%	25%	62%	50%	n/a	n/a
% of Students Earning a Living Wage	63%	46%	41%	37%	n/a	n/a

Source: Launchboard Pipeline (version available on (10/05/20)

Skills, Certifications and Education

Table 9. Top Skills for Certified Nursing Assistants and Certified Home Health Aides in Bay Region (October 2019 - September 2020)

Certified Nursing Assistants and Certified Home Health Aides in 12 County Bay Region and in Mid-Peninsula Sub-Region, 2020

Skill	Postings	Skill	Postings	Skill	Postings
Home Health	1,968	Long-Term Care	599	Assisted Living	384
Patient Care	1,929	Laundry	564	Patient Transportation and Transfer	376
Caregiving	1,676	Patient Assistance	562	Medical Assistance	371
Bathing	1,629	Life Support	559	Meal Serving	368
Cardiopulmonary Resuscitation (CPR)	1,589	Cleaning	543	Rehabilitation	366
Home Care	1,575	Customer Contact	531	Teaching	360
Activities of Daily Living (ADLS)	1,487	Hospice	530	Behavior Analysis	322
ADLs Assistance	1,486	Infection Control	490	Blood Pressure Measurement	309
Scheduling	1,102	Developmental Disabilities	479	Medication Administration	299
Meal Preparation	1,086	Acute Care	466	Patient/Family Education and Instruction	291
Vital Signs Measurement	1,037	Autism Diagnosis / Treatment / Care	442	Appointment Setting	288
Toileting	897	Interaction with Patients / Medical Personnel	431	Skin Care	281
Customer Service	773	Oral Hygiene	426	Medical Terminology	270
Treatment Planning	691	Applied Behavior Analysis	392	Hemodialysis	266
Patient Bathing	682	Medical Reminders	387	Bed Making and Linen Changes	258

Source: Burning Glass

Table 10. Certifications for Certified Nursing Assistants and Certified Home Health Aides in Bay Region (October 2019 - September 2020)

Note: 79% of records have been excluded because they do not include a certification. As a result, the chart below may not be representative of the full sample.

Certification	Postings	Certification	Postings
Certified Nursing Assistant	3,314	Emergency Medical Technician (EMT)	165
Driver's License	2,012	Licensed Practical Nurse (LPN)	142
Home Health Aide	1,287	Personal Care Assistant (PCA)	139
First Aid Cpr Aed	1,010	Certified Hemodialysis Technician	138
Basic Life Saving (BLS)	886	Licensed Vocational Nurse (LVN)	116
Basic Cardiac Life Support Certification	546	Board Certified Assistant Behavior Analyst (BCaBA)	88
Registered Behavior Technician	432	Patient Care Technician	59
Home Care Certificate	393	Food Handler Certification	45
Certified Medical Assistant	321	Direct Care	37
Board Certified Behavior Analyst (BCBA)	312	Security Clearance	34
American Heart Association Certification	205	Certified Medication Aide	34
Phlebotomy Certification	203	Certified Medical Technician	34

Source: Burning Glass

Table 11. Education Requirements for Certified Nursing Assistants and Certified Home Health Aides in Bay Region

Note: 59% of records have been excluded because they do not include a degree level. As a result, the chart below may not be representative of the full sample.

Education (minimum advertised)	Latest 12 Mos. Postings	Percent 12 Mos. Postings
High school or vocational training	3,193	100%
Associate Degree	0	0%
Bachelor's Degree or Higher	0	0%

Source: Burning Glass

Methodology

Occupations for this report were identified by use of skills listed in O*Net descriptions and job descriptions in Burning Glass. Labor demand data is sourced from Economic Modeling Specialists International (EMSI) occupation data and Burning Glass job postings data. Educational supply and student outcomes data is retrieved from multiple sources, including CTE Launchboard and CCCCCO Data Mart.

Sources

O*Net Online
 Labor Insight/Jobs (Burning Glass)
 Economic Modeling Specialists International (EMSI)
 CTE LaunchBoard www.calpassplus.org/Launchboard/
 Statewide CTE Outcomes Survey
 Employment Development Department Unemployment Insurance Dataset
 Living Insight Center for Community Economic Development
 Chancellor's Office MIS system

Contacts

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