INDUSTRY SURVEY
HEALTHLEADERS MEDIA 2010

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Empowering Healthcare

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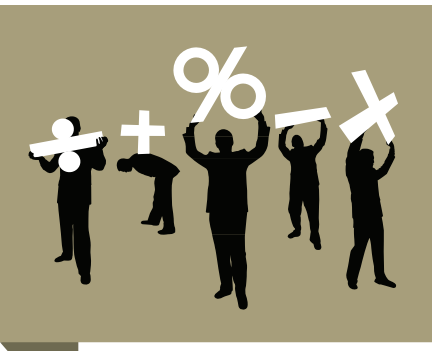
# COMMUNITY & RURAL



COMMUNITY & RURAL

# Recruiting, Retention, and RACs Top Concerns

Workforce issues, especially the acute shortage of physicians in low population areas, are the top concern for chief executive officers in hospitals serving rural and community hospitals, according to the 2010 HealthLeaders Media Industry Survey.

**NUMBER CRUNCHING**

**71 PERCENT**
Of rural CEOs respondents are male; that compares with 58% of non-rural CEOs.

**33 PERCENT**
Of rural CEOs say a shortage of primary care physicians will have a 'serious adverse impact' on their organization; that compares with 24% of non-rural CEOs.

**64 PERCENT**
Of rural CEOs earn between $100,001 to $250,000; that compares with 48% of non-rural CEOs, who tend to earn more.

Among CEOs in urban settings, physician recruitment and retention was ranked as among the top three priorities by only 27% of those responding, their fifth-highest overall priority. But among CEOs who direct rural hospitals, attracting and keeping doctors is among the top three priorities for 44% of those responding, making it their top overall priority.

Alan Morgan, CEO of the National Rural Health Association, says "that's not terribly surprising."

"Workforce issues are always going to be the No. 1 concern for rural hospital CEOs, and that's what makes rural hospitals unique," he says. Many hospitals in low-population areas consist of fewer than 200 beds, and many are considered critical access facilities, with no more than 25.

Another key area of difference between rural hospital CEOs and those in urban areas is the weight they give cost reduction strategies. Nearly half, or 45.7%, of CEOs who identified themselves as working at non-rural hospitals say that reducing costs is among their top priorities; indeed, it's their overall No. 1 priority. But when rural hospital CEOs were asked to specify their most important issues, only 25.1% cite cost reduction, putting it sixth-highest on their priority list..

So why is reducing cost not as much of an issue in rural settings as it is for urban ones? Morgan says that most rural hospitals are smaller, and "they're dealing with low-volume patient care. For the most part, they all seem to have a strong handle on the costs."

What they're more concerned about, Morgan says, is finding ways to improve health access, "how to recruit and retain quality professionals and how do they afford and implement health information technology. Those are certainly the issues I hear about most from our hospital CEOs as we move forward."

Indeed, nearly 63% of rural CEOs believe the government's stimulus IT/HITECH Act will have a positive impact on their organizations, while just 51% of non-rural CEOs see it that way.

Of the 368 CEOs who responded to the survey, 175 identified themselves as working in a rural setting.

For the most part, personnel concerns are consistent between rural and non-rural CEOs. However, eliminating low performers is a top priority among nearly 59% of

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rural CEOs, versus just 47% of their non-rural counterparts. Retention of seasoned employees is actually a greater concern among non-rural CEOs, who rank it fifth (26.23%), while rural CEOs put it ninth overall (17.71%).

Another area of marked difference is in the expected adverse impact of Recovery Audit Contractors. While a majority of non-rural CEOs say RACs will have a slightly or strongly negative impact on their organization (56.43%) that number is much higher among rural CEOs (77.57%).

Another area of significant difference was in how CEOs ranked 13 specialty service lines for potential growth within their organizations in the next three to five years.

Interestingly enough, rural hospital executives see greater potential for growth in several key areas.

While 53.89% of non-rural CEOs project growth in their geriatrics service line, 77.91% of rural CEOs are expecting growth (and 28% say that growth will be 6% or greater).

**—CHERYL CLARK**

"WORKFORCE ISSUES ARE ALWAYS GOING TO BE THE NO. 1 CONCERN FOR RURAL HOSPITAL CEOS, AND THAT'S WHAT MAKES RURAL HOSPITALS UNIQUE."

**–ALAN MORGAN**

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*Empowering Healthcare*

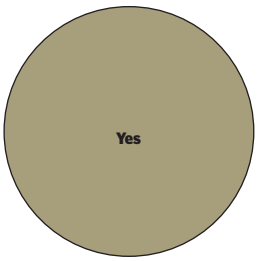
# COMMUNITY & RURAL

## 1. Which best describes your healthcare organization?

| | |
|---|---|
| Large hospital or health system (More than 500 beds) | 4.62% |
| Academic medical center | 0.58% |
| Midsized hospital (200-500 beds) | 6.36% |
| Small hospital (Fewer than 200 beds) | 42.20% |
| Critical-access hospital (No more than 25 beds) | 36.42% |
| Multispecialty group practice | 1.16% |
| Single-specialty group practice | 0.58% |
| Ambulatory or outpatient center | 6.36% |
| Physician-owned specialty hospital | 1.16% |
| Health insurance plan | 0.00% |
| Disease management/wellness plan provider | 0.58% |

Total Respondents: 173

## 2. Is your healthcare organization in a rural area?




Yes – 100%

No – 0%

TOTAL RESPONDENTS: 175

## 3. What best describes your primary market area?

| | |
|---|---|
| Northeast | 12.07% |
| Southeast | 17.82% |
| Midwest | 41.38% |
| Southwest | 9.20% |
| Northwest | 10.92% |
| West Coast | 2.30% |
| Other | 6.32% |

Total Respondents: 174

## 4. Which best describes your type of organization?

For profit – 14.37%

Nonprofit – 85.63%

TOTAL RESPONDENTS: 174

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# COMMUNITY & RURAL

## 5. Rank your organization's Top 3 priorities for the next 3 years. (1=Highest priority, 2=Second-highest, 3=Third-highest)

| | Rural Priority 1 | Non-rural Priority 1 | Rural Priority 2 | Non-rural Priority 2 | Rural Priority 3 | Non-rural Priority 3 | Rural Total selected | Non-rural Total selected | 2010 Rural Percent selected | 2010 Non-rural Percent selected | 2010 Rural Rank | 2010 Non-rural Rank |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Physician recruitment and retention | 32 | 17 | 32 | 18 | 13 | 15 | 77 | 50 | 44.00% | 26.88% | 1 | 5 |
| Quality/patient safety | 35 | 30 | 21 | 23 | 15 | 17 | 71 | 70 | 40.57% | 37.63% | 2 | 2 |
| Patient experience/patient satisfaction [1] | 19 | 23 | 24 | 21 | 18 | 17 | 61 | 61 | 34.86% | 32.80% | 3 | 3 |
| Reimbursement | 16 | 18 | 13 | 20 | 21 | 12 | 50 | 50 | 28.57% | 26.88% | 4 | 4 |
| Construction/capital improvements | 13 | 17 | 13 | 5 | 21 | 10 | 47 | 32 | 26.86% | 17.20% | 5 | 6 |
| Cost reduction | 16 | 30 | 14 | 24 | 14 | 31 | 44 | 85 | 25.14% | 45.70% | 6 | 1 |
| Physician staff ventures/realignment | 9 | 4 | 11 | 11 | 6 | 10 | 26 | 25 | 14.86% | 13.44% | 7 | 8 |
| Technology system/equipment | 3 | 5 | 8 | 6 | 13 | 9 | 24 | 20 | 13.71% | 10.75% | 8 | 10 |
| Employee satisfaction | 3 | 2 | 4 | 9 | 16 | 12 | 23 | 23 | 13.14% | 12.37% | 9 | 9 |
| New clinical products/services | 5 | 3 | 6 | 4 | 5 | 4 | 16 | 11 | 9.14% | 5.91% | 10 | 17 |
| RACs | 2 | 2 | 6 | 2 | 6 | 1 | 14 | 5 | 8.00% | 2.69% | 11 | 19 |
| Care coordination | 2 | 8 | 5 | 10 | 7 | 11 | 14 | 29 | 8.00% | 15.59% | 12 | 7 |
| Leadership development | 3 | 6 | 4 | 6 | 6 | 6 | 13 | 18 | 7.43% | 9.68% | 13 | 11 |
| Revenue cycle | 5 | 5 | 5 | 3 | 2 | 9 | 12 | 17 | 6.86% | 9.14% | 14 | 12 |
| Uncompensated care | 3 | 3 | 4 | 5 | 5 | 8 | 12 | 16 | 6.86% | 8.60% | 15 | 14 |
| Mergers & Acquisitions | 5 | 6 | 3 | 6 | 1 | 4 | 9 | 16 | 5.14% | 8.60% | 16 | 13 |
| Nurse/staff recruitment and retention | 1 | 0 | 2 | 8 | 3 | 5 | 6 | 13 | 3.43% | 6.99% | 17 | 15 |
| Other | 1 | 7 | 0 | 1 | 3 | 3 | 4 | 11 | 2.29% | 5.91% | 18 | 16 |
| Episode of care/bundled payments | 2 | 1 | 0 | 5 | 0 | 2 | 2 | 8 | 1.14% | 4.30% | 19 | 18 |
| Total Respondents | | | | | | | 175 | 186 | | | | |

[1] In 2009, asked as Consumer satisfaction
[2] In 2009, Transparency ranked 14th with 4%

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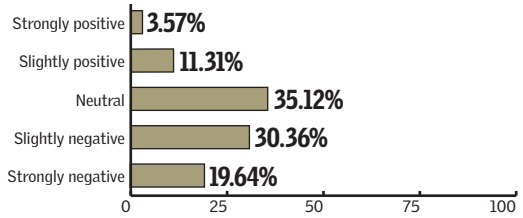
# COMMUNITY & RURAL

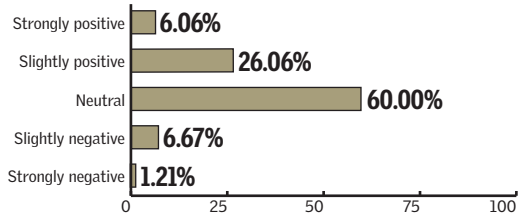
## 6. How will the following healthcare trends impact your organization in the next 3 years?

### Episode of care/bundled payments



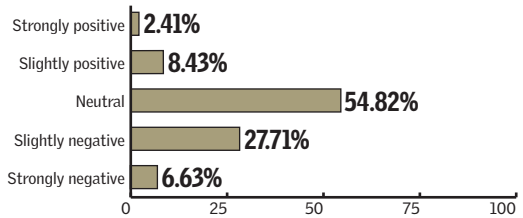

TOTAL RESPONDENTS: 168

### Comparative effectiveness research



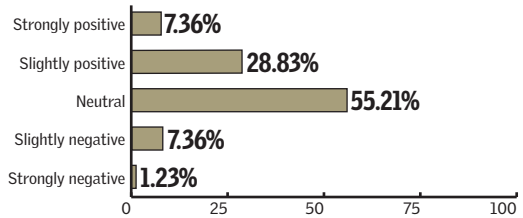

TOTAL RESPONDENTS: 165

### Malpractice concerns



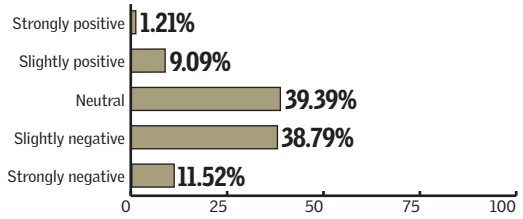

TOTAL RESPONDENTS: 166

### Medical home



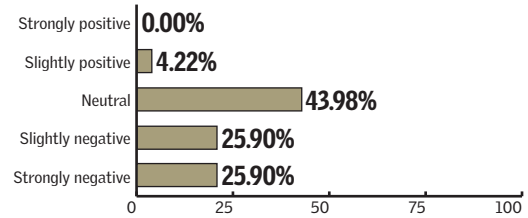

TOTAL RESPONDENTS: 163

### Nurse shortage



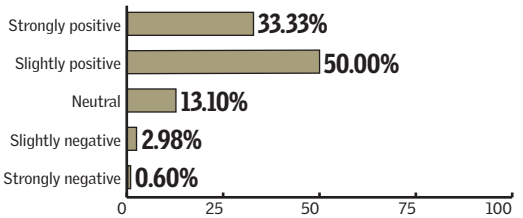

TOTAL RESPONDENTS: 165

### Organized labor



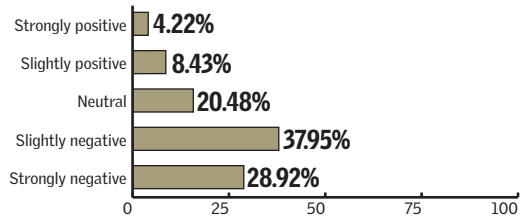

TOTAL RESPONDENTS: 166

### Patient experience, patient-centered care




TOTAL RESPONDENTS: 168

### Physician shortage, primary care




TOTAL RESPONDENTS: 166

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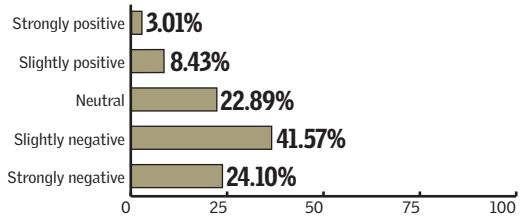
# COMMUNITY & RURAL

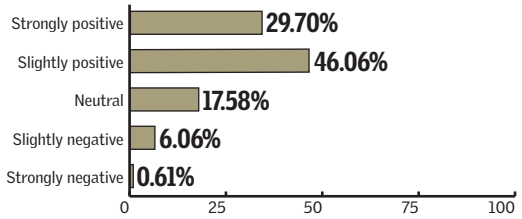
## 6. How will the following healthcare trends impact your organization in the next 3 years? (cont.)

### Physician shortage, specialty care



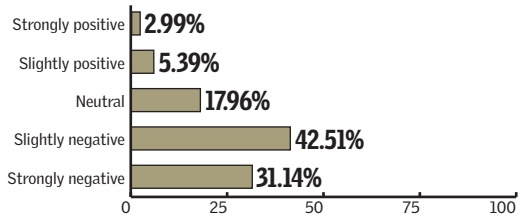

TOTAL RESPONDENTS: 166

### Quality improvement initiatives



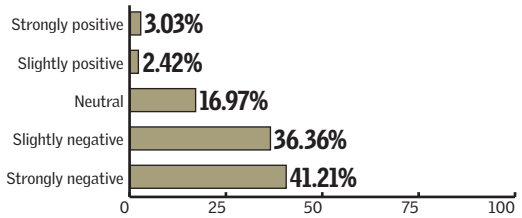

TOTAL RESPONDENTS: 165

### Increased regulatory scrutiny



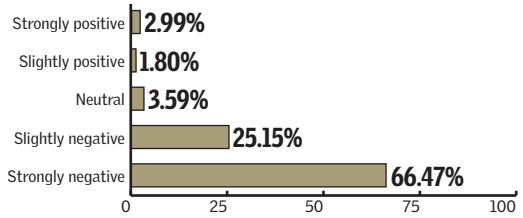

TOTAL RESPONDENTS: 167

### RACs



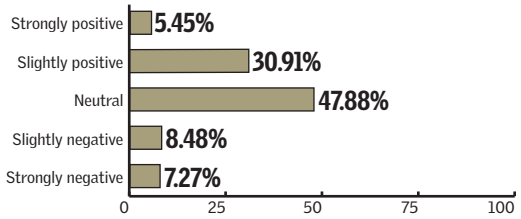

TOTAL RESPONDENTS: 165

### Reimbursement cuts



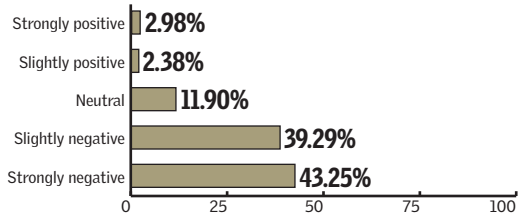

TOTAL RESPONDENTS: 167

### Stimulus package




TOTAL RESPONDENTS: 165

### Uncompensated care




TOTAL RESPONDENTS: 168

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# COMMUNITY & RURAL

## 7. Grade the stakeholders: What is your assessment of the job the following are doing with respect to healthcare reform?

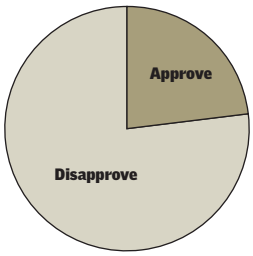
### President Barack Obama

Approve – 35.26%

Disapprove – 64.74%

TOTAL RESPONDENTS: 173

### Congressional Democrats




Approve – 23.26%

Disapprove – 76.74%

TOTAL RESPONDENTS: 172

### Congressional Republicans

Approve – 31.36%

Disapprove – 68.64%

TOTAL RESPONDENTS: 169

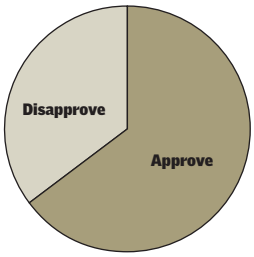
### Secretary of HHS Kathleen Sebelius

Approve – 36.71%

Disapprove – 63.29%

TOTAL RESPONDENTS: 158

### Hospital industry leadership




Approve – 64.88%

Disapprove – 35.12%

TOTAL RESPONDENTS: 168

### Physician industry leadership

Approve – 49.69%

Disapprove – 50.31%

TOTAL RESPONDENTS: 161

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# COMMUNITY & RURAL

## 7. Grade the stakeholders: What is your assessment of the job the following are doing with respect to healthcare reform? (cont.)

### Health plan leadership

Approve – 18.07%
Disapprove – 81.93%

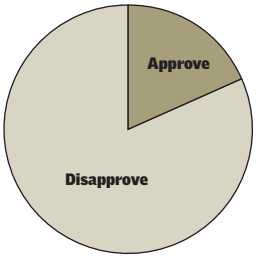
TOTAL RESPONDENTS: 166

### Drug makers

Approve – 11.18%
Disapprove – 88.82%

TOTAL RESPONDENTS: 161

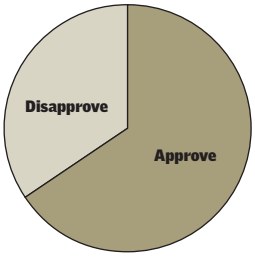
### Device makers




Approve – 18.35%
Disapprove – 81.65%

TOTAL RESPONDENTS: 158

### Your industry lobbyists/associations (AHA, AMA, AHIP, etc.)




Approve – 65.68%
Disapprove – 34.32%

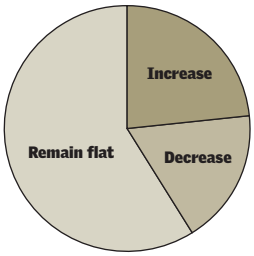
TOTAL RESPONDENTS: 169

### The public

Approve – 53.66%
Disapprove – 46.34%

TOTAL RESPONDENTS: 164

## 8. Describe plans for your education budget (webcasts, training, travel, etc.) for the next year; it will:




Increase – 23.43%
Decrease – 17.71%
Remain flat – 58.86%

TOTAL RESPONDENTS: 175

# COMMUNITY & RURAL

## 9. What impact will the federal stimulus package have on your organization?

| | Rural | Non-Rural |
|---|---|---|
| Positive | 35.06% | 23.66% |
| Negative | 12.07% | 17.74% |
| Neutral | 52.87% | 58.60% |
| Total Respondents | 174 | 186 |

## 10. Assess your organization's top leadership regarding the recession and economic crisis.

| | Rural | Non-Rural |
|---|---|---|
| Highly effective | 40.00% | 37.84% |
| Slightly effective | 44.00% | 35.14% |
| Neutral | 11.43% | 17.84% |
| Slightly ineffective | 4.57% | 8.65% |
| Highly ineffective | 0.00% | 0.54% |
| Total Respondents | 175 | 185 |

## 11. Describe the impact the recession is having on your organization's financial position.

| | Rural | Non-Rural |
|---|---|---|
| Improved | 4.00% | 9.73% |
| Weakened | 70.86% | 78.38% |
| Unaffected | 25.14% | 11.89% |
| Total Respondents | 175 | 185 |

## 12. Describe the impact the recession is having on morale at your organization.

| | Rural | Non-Rural |
|---|---|---|
| Improved | 4.57% | 5.38% |
| Weakened | 67.43% | 68.28% |
| Unaffected | 28.00% | 26.34% |
| Total Respondents | 175 | 186 |

## 13. What strategies are proving the most effective in dealing with the economic crisis?

### Layoffs, staff reduction

| | Rural | Non-Rural |
|---|---|---|
| Very effective | 8.54% | 8.52% |
| Slightly effective | 21.95% | 36.36% |
| Neutral | 40.85% | 34.09% |
| Slightly ineffective | 15.24% | 8.52% |
| Very ineffective | 13.41% | 12.50% |
| Total Respondents | 164 | 176 |

### Supply chain management improvements

| | Rural | Non-Rural |
|---|---|---|
| Very effective | 18.24% | 21.79% |
| Slightly effective | 63.53% | 53.63% |
| Neutral | 14.12% | 20.67% |
| Slightly ineffective | 3.53% | 1.68% |
| Very ineffective | 0.59% | 2.23% |
| Total Respondents | 170 | 179 |

### Cut capital spending

| | Rural | Non-Rural |
|---|---|---|
| Very effective | 12.12% | 24.72% |
| Slightly effective | 47.27% | 46.07% |
| Neutral | 27.27% | 19.10% |
| Slightly ineffective | 11.52% | 9.55% |
| Very ineffective | 1.82% | 0.56% |
| Total Respondents | 165 | 178 |

### Cut services

| | Rural | Non-Rural |
|---|---|---|
| Very effective | 2.55% | 6.67% |
| Slightly effective | 22.29% | 16.11% |
| Neutral | 42.68% | 47.22% |
| Slightly ineffective | 18.47% | 16.67% |
| Very ineffective | 14.01% | 13.33% |
| Total Respondents | 157 | 180 |

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# COMMUNITY & RURAL

## 13. What strategies are proving the most effective in dealing with the economic crisis? (cont.)

### Emphasize high-margin services

| | Rural | Non-Rural |
|---|---|---|
| Very effective | 11.46% | 16.85% |
| Slightly effective | 49.04% | 42.13% |
| Neutral | 33.12% | 33.15% |
| Slightly ineffective | 5.10% | 6.18% |
| Very ineffective | 1.27% | 1.69% |
| Total Respondents | 157 | 178 |

### Debt restructuring

| | Rural | Non-Rural |
|---|---|---|
| Very effective | 9.55% | 13.79% |
| Slightly effective | 30.57% | 27.59% |
| Neutral | 52.87% | 52.87% |
| Slightly ineffective | 3.82% | 4.60% |
| Very ineffective | 3.18% | 1.15% |
| Total Respondents | 157 | 174 |

### Sale of assets to raise cash

| | Rural | Non-Rural |
|---|---|---|
| Very effective | 3.18% | 2.40% |
| Slightly effective | 10.83% | 7.78% |
| Neutral | 63.06% | 67.07% |
| Slightly ineffective | 9.55% | 12.57% |
| Very ineffective | 13.38% | 10.18% |
| Total Respondents | 157 | 167 |

### Revenue cycle enhancements

| | Rural | Non-Rural |
|---|---|---|
| Very effective | 24.85% | 20.11% |
| Slightly effective | 51.52% | 50.28% |
| Neutral | 21.21% | 24.02% |
| Slightly ineffective | 2.42% | 5.03% |
| Very ineffective | 0.00% | 0.56% |
| Total Respondents | 165 | 179 |

### Physician alignment

| | Rural | Non-Rural |
|---|---|---|
| Very effective | 25.63% | 28.41% |
| Slightly effective | 39.38% | 39.20% |
| Neutral | 28.75% | 24.43% |
| Slightly ineffective | 5.00% | 6.25% |
| Very ineffective | 1.25% | 1.70% |
| Total Respondents | 160 | 176 |

### Mergers & Acquisitions

| | Rural | Non-Rural |
|---|---|---|
| Very effective | 5.23% | 8.72% |
| Slightly effective | 15.69% | 14.53% |
| Neutral | 69.28% | 65.70% |
| Slightly ineffective | 4.58% | 5.23% |
| Very ineffective | 5.23% | 5.81% |
| Total Respondents | 153 | 172 |

## 14. Would you encourage your child to enter a career in the healthcare industry?

| | Rural | Non-Rural |
|---|---|---|
| Yes | 81.61% | 83.15% |
| No | 18.39% | 16.85% |
| Total Respondents | 174 | 184 |

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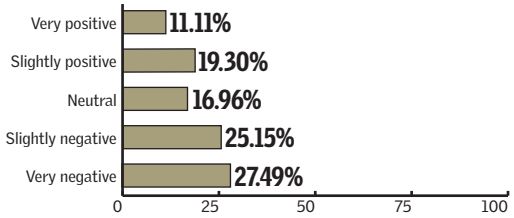
# COMMUNITY & RURAL

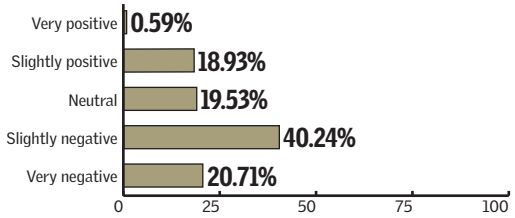
## 15. Which particular aspects of healthcare reform will have the greatest influence on your future business?

### Public health plan option



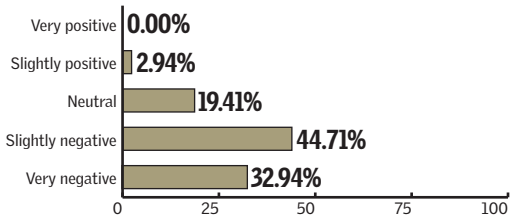

TOTAL RESPONDENTS: 171

### Episode of care/bundled payments



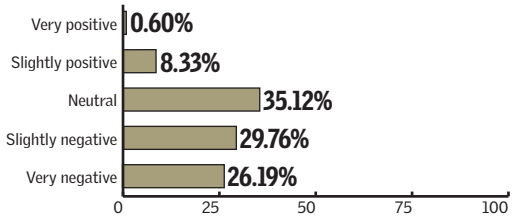

TOTAL RESPONDENTS: 169

### Nonpayment for readmission with same condition




TOTAL RESPONDENTS: 170

### Increase in MedPAC (or similar executive branch committee) reimbursement authority

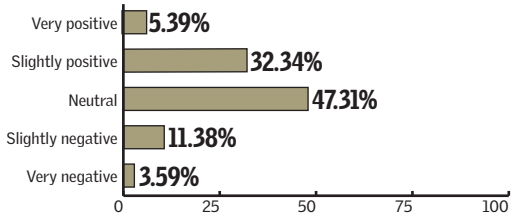



TOTAL RESPONDENTS: 168

### Stimulus IT/HITECH Act

| | Rural | Non-Rural |
|---|---|---|
| Very positive | 14.71% | 10.67% |
| Slightly positive | 48.24% | 40.45% |
| Neutral | 25.29% | 32.58% |
| Slightly negative | 8.82% | 13.48% |
| Very negative | 2.94% | 2.81% |
| Total Respondents | 170 | 178 |

### Comparative effectiveness research




TOTAL RESPONDENTS: 167

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# COMMUNITY & RURAL

## 16. How would you rate the current status/quality of each of these aspects of your organization?

### Medical quality

| | Rural | Non-Rural |
|---|---|---|
| Very strong | 50.29% | 54.89% |
| Slightly strong | 41.04% | 36.41% |
| Neutral | 6.94% | 4.89% |
| Slightly weak | 1.73% | 3.26% |
| Very weak | 0.00% | 0.54% |
| Total Respondents | 173 | 184 |

### Patient experience

| | Rural | Non-Rural |
|---|---|---|
| Very strong | 55.23% | 48.37% |
| Slightly strong | 36.05% | 37.50% |
| Neutral | 4.65% | 9.24% |
| Slightly weak | 3.49% | 4.35% |
| Very weak | 0.58% | 0.54% |
| Total Respondents | 172 | 184 |

### Marketing

| | Rural | Non-Rural |
|---|---|---|
| Very strong | 8.82% | 14.21% |
| Slightly strong | 41.18% | 43.17% |
| Neutral | 30.00% | 16.39% |
| Slightly weak | 15.88% | 20.22% |
| Very weak | 4.12% | 6.01% |
| Total Respondents | 170 | 183 |

### Fiscal management

| | Rural | Non-Rural |
|---|---|---|
| Very strong | 43.86% | 48.09% |
| Slightly strong | 36.26% | 33.33% |
| Neutral | 9.94% | 9.84% |
| Slightly weak | 9.36% | 8.20% |
| Very weak | 0.58% | 0.55% |
| Total Respondents | 171 | 183 |

### Information technology

| | Rural | Non-Rural |
|---|---|---|
| Very strong | 19.30% | 15.22% |
| Slightly strong | 43.27% | 43.48% |
| Neutral | 12.28% | 15.76% |
| Slightly weak | 18.13% | 16.30% |
| Very weak | 7.02% | 9.24% |
| Total Respondents | 171 | 184 |

### Physician staff

| | Rural | Non-Rural |
|---|---|---|
| Very strong | 30.81% | 38.80% |
| Slightly strong | 44.77% | 41.53% |
| Neutral | 10.47% | 13.11% |
| Slightly weak | 12.21% | 6.56% |
| Very weak | 1.74% | 0.00% |
| Total Respondents | 172 | 183 |

### Nursing staff

| | Rural | Non-Rural |
|---|---|---|
| Very strong | 39.53% | 40.44% |
| Slightly strong | 40.70% | 32.24% |
| Neutral | 11.63% | 20.77% |
| Slightly weak | 6.98% | 6.01% |
| Very weak | 1.16% | 0.55% |
| Total Respondents | 172 | 183 |

### Workplace culture/morale

| | Rural | Non-Rural |
|---|---|---|
| Very strong | 28.65% | 25.00% |
| Slightly strong | 45.03% | 45.56% |
| Neutral | 13.45% | 13.33% |
| Slightly weak | 12.28% | 12.78% |
| Very weak | 0.58% | 3.33% |
| Total Respondents | 171 | 180 |

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# COMMUNITY & RURAL

## 16. How would you rate the current status/quality of each of these aspects of your organization? (cont.)

### Long-term planning

| | Rural | Non-Rural |
|---|---|---|
| Very strong | 23.08% | 19.78% |
| Slightly strong | 47.93% | 46.15% |
| Neutral | 14.79% | 12.09% |
| Slightly weak | 13.02% | 18.68% |
| Very weak | 1.18% | 3.30% |
| Total Respondents | 169 | 182 |

### Dedication to mission

| | Rural | Non-Rural |
|---|---|---|
| Very strong | 54.82% | 53.30% |
| Slightly strong | 33.73% | 34.62% |
| Neutral | 8.43% | 7.69% |
| Slightly weak | 2.41% | 4.40% |
| Very weak | 0.60% | 0.00% |
| Total Respondents | 166 | 182 |

### Prospects for growth

| | Rural | Non-Rural |
|---|---|---|
| Very strong | 22.22% | 27.32% |
| Slightly strong | 41.52% | 45.36% |
| Neutral | 24.56% | 16.94% |
| Slightly weak | 7.60% | 8.74% |
| Very weak | 4.09% | 1.64% |
| Total Respondents | 171 | 183 |

### Evidence-based medicine

| | Rural | Non-Rural |
|---|---|---|
| Very strong | 8.28% | 22.95% |
| Slightly strong | 44.97% | 43.72% |
| Neutral | 29.59% | 24.04% |
| Slightly weak | 13.61% | 6.01% |
| Very weak | 3.55% | 3.28% |
| Total Respondents | 169 | 183 |

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# COMMUNITY & RURAL

## 17. Rank in order the Top 3 biggest drivers of healthcare costs.

| | No. 1 Driver | No. 2 Driver | No. 3 Driver | Total selected | 2010 Percent selected | 2010 Rank |
|---|---|---|---|---|---|---|
| Government laws and mandates | 52 | 29 | 20 | 101 | 57.71% | 1 |
| Non-rural | 54 | 20 | 30 | 104 | 57.14% | 1 |
| Labor costs | 18 | 26 | 24 | 68 | 38.86% | 2 |
| Non-rural | 28 | 24 | 17 | 69 | 37.91% | 3 |
| Patient lack of responsibility | 22 | 18 | 27 | 67 | 38.29% | 3 |
| Non-rural | 17 | 16 | 25 | 58 | 31.87% | 5 |
| Overutilization of service | 21 | 19 | 20 | 60 | 34.29% | 4 |
| Non-rural | 26 | 20 | 28 | 74 | 40.66% | 2 |
| Malpractice litigation | 16 | 13 | 27 | 56 | 32.00% | 5 |
| Non-rural | 13 | 23 | 23 | 59 | 32.42% | 4 |
| Pharmaceuticals | 15 | 19 | 17 | 51 | 29.14% | 6 |
| Non-rural | 10 | 20 | 14 | 44 | 24.18% | 6 |
| Health plan overhead | 11 | 20 | 12 | 43 | 24.57% | 7 |
| Non-rural | 11 | 13 | 12 | 36 | 19.78% | 8 |
| Clinical technology | 6 | 11 | 14 | 31 | 17.71% | 8 |
| Non-rural | 9 | 11 | 20 | 40 | 21.98% | 7 |
| Medical devices | 9 | 6 | 10 | 25 | 14.29% | 9 |
| Non-rural | 10 | 16 | 6 | 32 | 17.58% | 9 |
| Physician inefficiency | 2 | 9 | 1 | 12 | 6.86% | 10 |
| Non-rural | 4 | 14 | 7 | 25 | 13.74% | 10 |
| Hospital errors | 0 | 2 | 0 | 2 | 1.14% | 11 |
| Non-rural | 0 | 4 | 1 | 5 | 2.75% | 11 |
| Total respondents | | | | 175 | | |
| Non-rural | | | | 182 | | |

## 18. Please indicate your age range.

| | Rural | Non-Rural |
|---|---|---|
| 35 or younger | 2.87% | 2.17% |
| 36-45 | 13.22% | 15.22% |
| 46-55 | 37.36% | 32.07% |
| 56-65 | 41.95% | 47.28% |
| 66 or older | 4.60% | 3.26% |
| Total Respondents | 174 | 186 |

## 19. What is your gender?

| | Rural | Non-Rural |
|---|---|---|
| Male | 71.10% | 58.24% |
| Female | 28.90% | 41.76% |
| Total Respondents | 173 | 182 |

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# COMMUNITY & RURAL

## 20. Describe your overall job satisfaction.

| | Rural | Non-Rural |
|---|---|---|
| Very satisfied | 43.68% | 47.54% |
| Satisfied | 43.10% | 42.08% |
| Neutral | 6.32% | 7.10% |
| Dissatisfied | 6.32% | 2.73% |
| Very dissatisfied | 0.57% | 0.55% |
| Total Respondents | 174 | 183 |

## 21. Which of the following titles/roles are represented on your senior executive team—the inner circle that works together on strategic planning? (Select all that apply.)

| | |
|---|---|
| Chief executive officer | 89.71% |
| Chief operating officer | 37.71% |
| Chief financial officer | 63.43% |
| Chief medical officer | 26.86% |
| Chief marketing officer | 18.86% |
| Chief nursing officer | 60.00% |
| Human resources officer | 40.57% |
| Chief information officer | 17.71% |
| Chief quality officer | 20.57% |
| Chief strategy officer | 6.29% |
| Chief innovation officer | 1.71% |
| Chief medical informatics officer | 3.43% |
| Service line director(s) | 13.14% |
| Other | 17.71% |

Total Respondents: 175

## 22. Please rank the following service lines for growth potential within your organization in the next 3 to 5 years; they will:

### Cardiovascular

| | Rural, Percent selected | Non-rural, Percent selected |
|---|---|---|
| Grow 6% or more | 20.99% | 18.56% |
| Grow 1-5% | 38.27% | 36.53% |
| Remain flat | 39.51% | 37.72% |
| Decline 1-5% | 1.23% | 5.99% |
| Decline 6% or more | 0.00% | 1.20% |
| Total Respondents | 162 | 167 |
| *Overall rank* | *4* | *4* |

### Gastroenterology

| | Rural, Percent selected | Non-rural, Percent selected |
|---|---|---|
| Grow 6% or more | 10.37% | 12.28% |
| Grow 1-5% | 53.66% | 38.01% |
| Remain flat | 33.54% | 46.20% |
| Decline 1-5% | 2.44% | 3.51% |
| Decline 6% or more | 0.00% | 0.00% |
| Total Respondents | 164 | 171 |
| *Overall rank* | *8* | *11* |

### General surgery

| | Rural, Percent selected | Non-rural, Percent selected |
|---|---|---|
| Grow 6% or more | 14.88% | 16.87% |
| Grow 1-5% | 56.55% | 43.98% |
| Remain flat | 27.38% | 33.73% |
| Decline 1-5% | 1.19% | 4.22% |
| Decline 6% or more | 0.00% | 1.20% |
| Total Respondents | 168 | 166 |
| *Overall rank* | *6* | *5* |

### Geriatrics

| | Rural, Percent selected | Non-rural, Percent selected |
|---|---|---|
| Grow 6% or more | 28.22% | 20.96% |
| Grow 1-5% | 49.69% | 32.93% |
| Remain flat | 22.09% | 46.11% |
| Decline 1-5% | 0.00% | 0.00% |
| Decline 6% or more | 0.00% | 0.00% |
| Total Respondents | 163 | 167 |
| *Overall rank* | *1* | *3* |

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# COMMUNITY & RURAL

## 22. Please rank the following service lines for growth potential within your organization in the next 3 to 5 years; they will (cont.)

### Imaging

| | Rural, Percent selected | Non-rural, Percent selected |
|---|---|---|
| Grow 6% or more | 25.30% | 12.05% |
| Grow 1-5% | 48.19% | 43.37% |
| Remain flat | 23.49% | 40.96% |
| Decline 1-5% | 3.01% | 3.61% |
| Decline 6% or more | 0.00% | 0.00% |
| Total Respondents | 166 | 166 |
| *Overall rank* | *3* | *12* |

### Intensive care

| | Rural, Percent selected | Non-rural, Percent selected |
|---|---|---|
| Grow 6% or more | 10.91% | 13.94% |
| Grow 1-5% | 26.67% | 35.15% |
| Remain flat | 60.61% | 49.70% |
| Decline 1-5% | 1.82% | 0.61% |
| Decline 6% or more | 0.00% | 0.61% |
| Total Respondents | 165 | 165 |
| *Overall rank* | *7* | *8* |

### Neuroscience

| | Rural, Percent selected | Non-rural, Percent selected |
|---|---|---|
| Grow 6% or more | 7.01% | 21.56% |
| Grow 1-5% | 18.47% | 32.34% |
| Remain flat | 72.61% | 44.91% |
| Decline 1-5% | 1.91% | 0.60% |
| Decline 6% or more | 0.00% | 0.60% |
| Total Respondents | 157 | 167 |
| *Overall rank* | *12* | *2* |

### Oncology

| | Rural, Percent selected | Non-rural, Percent selected |
|---|---|---|
| Grow 6% or more | 9.20% | 15.95% |
| Grow 1-5% | 44.79% | 34.36% |
| Remain flat | 44.17% | 47.24% |
| Decline 1-5% | 1.23% | 1.84% |
| Decline 6% or more | 0.61% | 0.61% |
| Total Respondents | 163 | 163 |
| *Overall rank* | *9* | *6* |

### Orthopedics

| | Rural, Percent selected | Non-rural, Percent selected |
|---|---|---|
| Grow 6% or more | 25.30% | 25.00% |
| Grow 1-5% | 51.81% | 48.21% |
| Remain flat | 21.69% | 21.43% |
| Decline 1-5% | 1.20% | 4.76% |
| Decline 6% or more | 0.00% | 0.60% |
| Total Respondents | 166 | 168 |
| *Overall rank* | *2* | *1* |

### Urology

| | Rural, Percent selected | Non-rural, Percent selected |
|---|---|---|
| Grow 6% or more | 8.86% | 11.38% |
| Grow 1-5% | 44.30% | 31.74% |
| Remain flat | 46.20% | 54.49% |
| Decline 1-5% | 0.63% | 2.40% |
| Decline 6% or more | 0.00% | 0.00% |
| Total Respondents | 158 | 167 |
| *Overall rank* | *10* | *13* |

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# COMMUNITY & RURAL

## 22. Please rank the following service lines for growth potential within your organization in the next 3 to 5 years; they will (cont.)

### Vascular

| | Rural, Percent selected | Non-rural, Percent selected |
|---|---|---|
| Grow 6% or more | 7.01% | 15.34% |
| Grow 1-5% | 28.66% | 44.17% |
| Remain flat | 62.42% | 37.42% |
| Decline 1-5% | 1.91% | 2.45% |
| Decline 6% or more | 0.00% | 0.61% |
| Total Respondents | 157 | 163 |
| *Overall rank* | *11* | *7* |

### Wellness/Bariatric

| | Rural, Percent selected | Non-rural, Percent selected |
|---|---|---|
| Grow 6% or more | 5.66% | 12.88% |
| Grow 1-5% | 28.93% | 34.97% |
| Remain flat | 59.12% | 47.24% |
| Decline 1-5% | 5.03% | 3.07% |
| Decline 6% or more | 1.26% | 1.84% |
| Total Respondents | 159 | 163 |
| *Overall rank* | *13* | *10* |

### Women's health

| | Rural, Percent selected | Non-rural, Percent selected |
|---|---|---|
| Grow 6% or more | 17.79% | 13.77% |
| Grow 1-5% | 46.01% | 34.73% |
| Remain flat | 34.36% | 47.31% |
| Decline 1-5% | 1.84% | 4.19% |
| Decline 6% or more | 0.00% | 0.00% |
| Total Respondents | 163 | 167 |
| *Overall rank* | *5* | *9* |

## 23. How much autonomy do the service line leaders have to make strategic and purchasing decisions?

| | Rural | Non-rural |
|---|---|---|
| Complete: Decisions can be made largely independent of other hospital initiatives and priorities. | 4.68% | 4.55% |
| Moderate: Some independence, but major decisions must incorporate other hospital initiatives and priorities. | 74.27% | 73.86% |
| Zero: Service line decisions are largely driven by hospitalwide initiatives and priorities. | 21.05% | 21.59% |
| Total Respondents | 171 | 176 |

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# COMMUNITY & RURAL

## 24. The business relationship between hospitals and physicians is changing. Which physician relationship models does your organization use? (Select all that apply.)

| | Rural percent selected | Rural rank | Non-rural percent selected | Non-rural rank |
|---|---|---|---|---|
| Full employment | 75.90% | 1 | 63.00% | 1 |
| Space and equipment leases | 41.57% | 2 | 23.12% | 4 |
| Management agreements | 33.74% | 3 | 45.66% | 2 |
| Joint venture | 31.33% | 4 | 41.04% | 3 |
| Deferred compensation accounts | 6.63% | 5 | 5.20% | 8 |
| Other | 4.82% | 6 | 7.51% | 6 |
| Gainsharing | 2.41% | 7 | 8.67% | 5 |
| Block leases | 1.20% | 8 | 6.94% | 7 |
| Total respondents | 166 | | 173 | |

## 25. How will you fuel financial growth over the next 5 years? (Select all that apply.)

| | Rural percent selected | Rural rank | Non-rural percent selected | Non-rural rank |
|---|---|---|---|---|
| Expand outpatient services | 81.29% | 1 | 61.20% | 1 |
| Start or increase promising business lines or facilities | 56.73% | 2 | 57.38% | 2 |
| Launch strategic marketing campaign for existing market | 46.20% | 3 | 45.36% | 3 |
| Acquire physician practices | 35.67% | 4 | 22.95% | 7 |
| Launch strategic marketing campaign for new market | 35.09% | 5 | 33.88% | 4 |
| Joint ventures | 33.33% | 6 | 32.79% | 5 |
| Develop (or partner with) a convenient care facility | 16.37% | 7 | 12.57% | 9 |
| Acquire or merge with competing or complementary hospitals | 15.20% | 8 | 18.03% | 8 |
| Increase inpatient bed capacity | 11.11% | 9 | 27.32% | 6 |
| Develop or grow non-healthcare-related business lines | 8.77% | 10 | 9.29% | 10 |
| Other | 7.02% | 11 | 6.01% | 11 |
| Total respondents | 171 | | 183 | |

## 26. Rate the impact each of these workforce shortages will have on your operations within the next 3 years.

| | Rural No adverse impact | Rural Slight adverse impact | Rural Moderate adverse impact | Rural Serious adverse impact | Rural Respondents | Non-rural No adverse impact | Non-rural Slight adverse impact | Non-rural Moderate adverse impact | Non-rural Serious adverse impact | Non-rural Respondents |
|---|---|---|---|---|---|---|---|---|---|---|
| Executive leadership | 44.19% | 35.47% | 18.60% | 1.74% | 172 | 58.92% | 22.70% | 15.14% | 3.24% | 185 |
| Nurse managers | 26.32% | 46.20% | 19.30% | 8.19% | 171 | 30.77% | 32.42% | 26.92% | 9.89% | 182 |
| Nursing staff | 17.75% | 44.97% | 24.85% | 12.43% | 169 | 20.33% | 35.71% | 29.67% | 14.29% | 182 |
| Primary care physicians | 13.45% | 24.56% | 28.65% | 33.33% | 171 | 23.63% | 29.12% | 23.63% | 23.63% | 182 |
| Specialty physicians | 13.53% | 27.65% | 32.94% | 25.88% | 170 | 16.67% | 28.89% | 31.11% | 23.33% | 180 |
| Skilled technicians | 14.20% | 41.42% | 37.28% | 7.10% | 169 | 22.78% | 41.11% | 30.56% | 5.56% | 180 |
| Non-healthcare | 58.28% | 31.29% | 9.82% | 0.61% | 163 | 61.40% | 26.90% | 11.11% | 0.58% | 175 |

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# COMMUNITY & RURAL

## 27. Rank in order the No. 1, 2, and 3 personnel issues at your organization that need improvement.

| | | No. 1 issue | No. 2 issue | No. 3 issue | Total selected | Percent selected | Rank |
|---|---|---|---|---|---|---|---|
| Eliminating low performers | Rural | 39 | 29 | 35 | 103 | 58.86% | 1 |
| | Non-rural | 20 | 33 | 33 | 86 | 46.99% | 2 |
| Developing middle managers | Rural | 25 | 37 | 27 | 89 | 50.86% | 2 |
| | Non-rural | 38 | 30 | 24 | 92 | 50.27% | 1 |
| Grooming future leaders | Rural | 19 | 22 | 17 | 58 | 33.14% | 3 |
| | Non-rural | 18 | 21 | 15 | 54 | 29.51% | 4 |
| Overall morale | Rural | 14 | 15 | 20 | 49 | 28.00% | 4 |
| | Non-rural | 17 | 24 | 23 | 64 | 34.97% | 3 |
| Training frontline staff | Rural | 8 | 18 | 16 | 42 | 24.00% | 5 |
| | Non-rural | 8 | 11 | 23 | 42 | 22.95% | 8 |
| Succession planning for senior-level staff | Rural | 8 | 13 | 16 | 37 | 21.14% | 6 |
| | Non-rural | 21 | 15 | 11 | 47 | 25.68% | 6 |
| Avoiding layoffs | Rural | 17 | 5 | 12 | 34 | 19.43% | 7 |
| | Non-rural | 16 | 8 | 20 | 44 | 24.04% | 7 |
| Hiring enough people | Rural | 17 | 5 | 9 | 31 | 17.71% | 8 |
| | Non-rural | 10 | 9 | 5 | 24 | 13.11% | 10 |
| Retention of seasoned employees | Rural | 10 | 12 | 9 | 31 | 17.71% | 9 |
| | Non-rural | 18 | 17 | 13 | 48 | 26.23% | 5 |
| Retaining employees during first year of employment | Rural | 6 | 10 | 6 | 22 | 12.57% | 10 |
| | Non-rural | 9 | 11 | 5 | 25 | 13.66% | 9 |
| Dealing with organized labor issues | Rural | 7 | 5 | 3 | 15 | 8.57% | 11 |
| | Non-rural | 6 | 4 | 9 | 19 | 10.38% | 11 |
| Other | Rural | 2 | 1 | 2 | 5 | 2.86% | 12 |
| | Non-rural | 1 | 0 | 1 | 2 | 1.09% | 12 |

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# COMMUNITY & RURAL

## 28. Which best describes your total annual salary + bonus compensation package (not counting outside investments or income)?

| | Rural Percent | Non-rural Percent |
|---|---|---|
| $100,000 or less | 14.20% | 14.77% |
| $100,001-$250,000 | 63.91% | 47.73% |
| $250,001-$500,000 | 17.16% | 26.14% |
| $500,001-$1,000,000 | 3.55% | 10.23% |
| More than $1 million | 1.18% | 1.14% |
| Total respondents | 169 | 176 |

## 29. When do you plan to leave or retire from your current position?

| | Rural Percent | Non-rural Percent |
|---|---|---|
| Within the next year | 4.17% | 6.52% |
| 1-5 years | 39.29% | 32.61% |
| 6-10 years | 34.52% | 38.04% |
| 11+ years | 22.02% | 22.83% |
| Total respondents | 168 | 184 |

## 30. How concerned are you about stricter oversight related to your organization's tax exemption?

| | Rural Percent | Non-rural Percent |
|---|---|---|
| Major concern | 24.42% | 13.19% |
| Minor concern | 38.95% | 29.67% |
| No concern | 25.00% | 28.02% |
| Not applicable | 11.63% | 29.12% |
| Total respondents | 172 | 182 |

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