

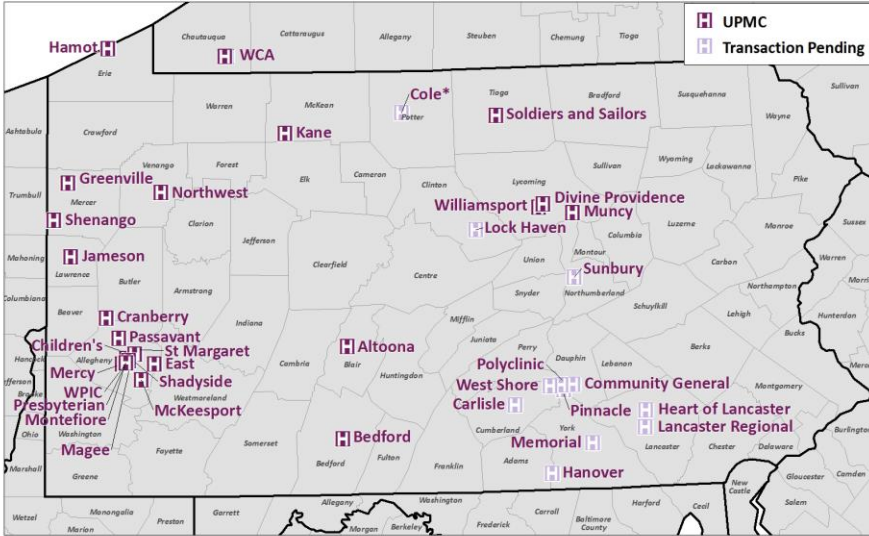


The Silent Partner Speaks:
**Clinical Education's Hidden
Dependence on Health Systems**

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I have no conflicts

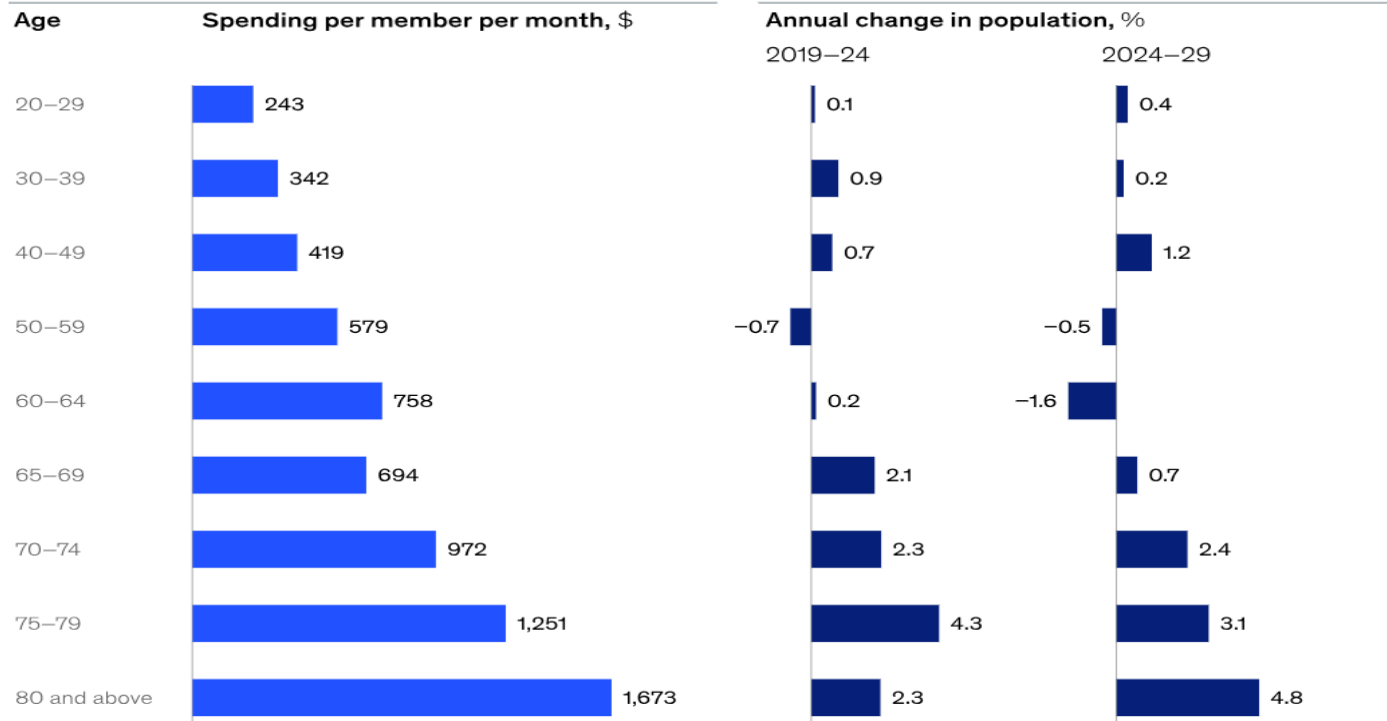
UPMC



- UPMC is a vertically *Integrated Health Delivery and Finance System (IDFS)*
- Payer - provider
 - Hospital services
 - Physician services
 - Integrated health insurance company

- More than 40 Hospitals in 3 states
- Over 800 sites of care
 - 5,900 Physicians
 - 12,000 Nurses
 - **5,000 APPs**
 - **2,000 NPs**
 - **2,500 PAs**
- 4 million lives covered by UPMC Health Plan

An aging population would have a meaningful impact on overall healthcare cost trends.

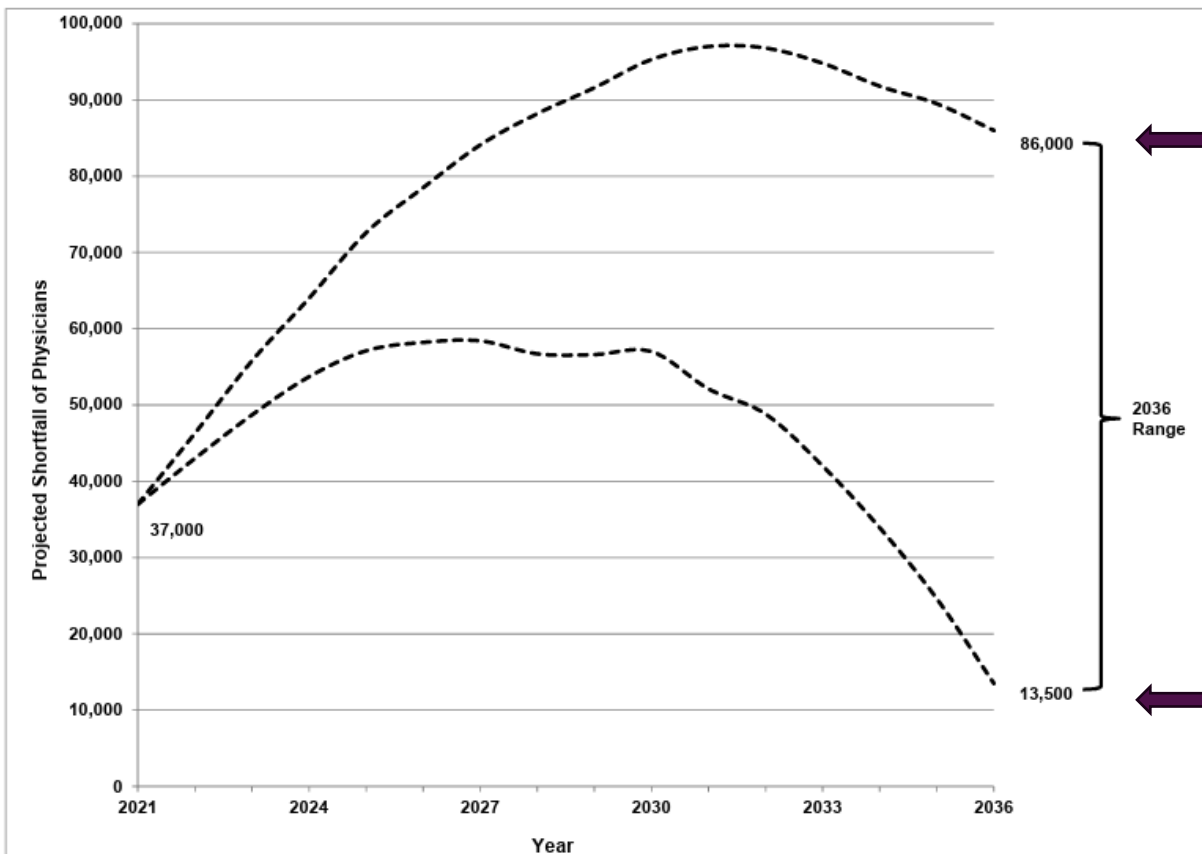


Source: CMS LDS claims data (2017–23); large commercial insurance dataset (2017–23); census data

McKinsey & Company

Total Physician Supply and Demand

Exhibit 1: Total Projected Physician Shortfall Range, 2021-2036



← What we need.

Physician shortage projections are often used as a proxy for broader clinical workforce demand.

← What we will have.

Clinical Education Has Two Economies

The visible economy

- Students apply to schools and programs, not health systems
- Students pay tuition to the academic institution
- Didactic education is designed and priced by the academic institution
- Program growth creates institutional revenue opportunities
- Academic programs control enrollment growth

The hidden economy

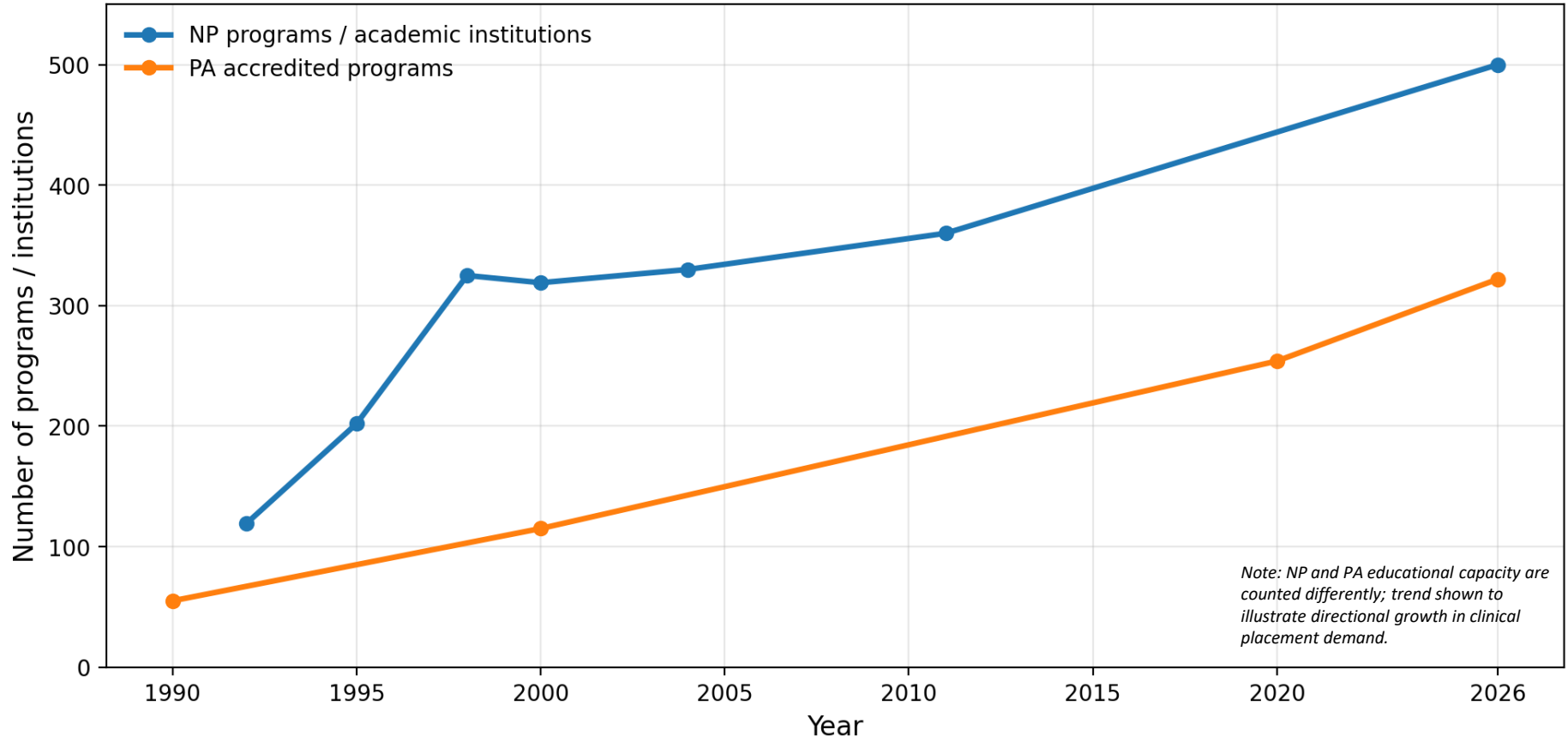
- Schools own the curriculum; health system preceptors build the bedside competence
- Preceptors supervise / assess students on behalf of the program
- Most teaching labor is unpaid and absorbed into daily operations
- Clinical capacity, not classroom capacity, becomes the limiting factor.

The first economy gets the dollars. The second is donated.

The “Hidden” Economy is Under Pressure

- Demand is rising
 - New programs, larger class sizes increase demand for placements
 - Online / hybrid programs grow class size faster than clinical sites can grow capacity
 - NP / PA remain attractive careers (BLS)
- Clinical teaching capacity has changed
 - Health systems are managing sicker patients, higher volumes, shrinking margins and workforce shortages
 - Good teaching can mean fewer patients seen
 - Every student placement now has an operational cost

Growth in APP Educational Capacity, 1990-2026

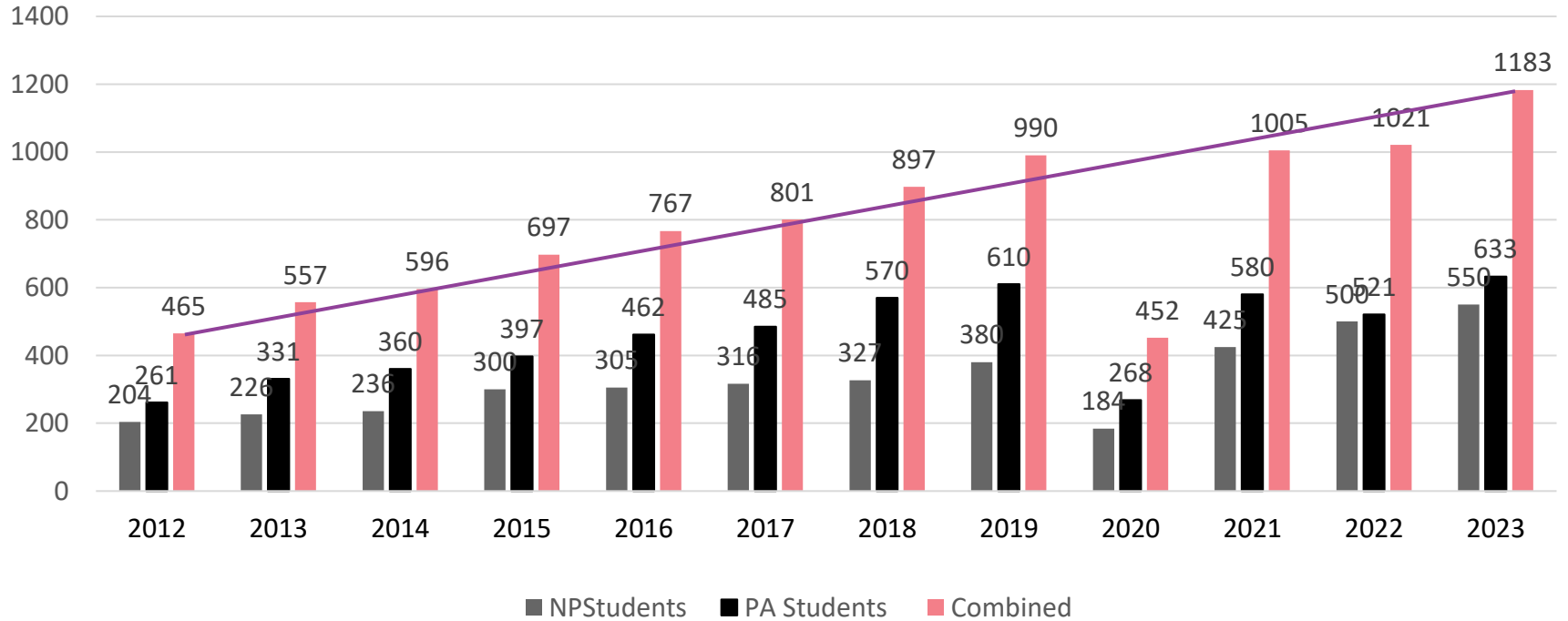


Note: NP data are historical program-count anchors through 2011 plus AANP's current estimate of ~500 academic institutions with NP programs. PA data are ARC-PA accredited program counts.

Advanced Practice Provider Students Rotating at UPMC

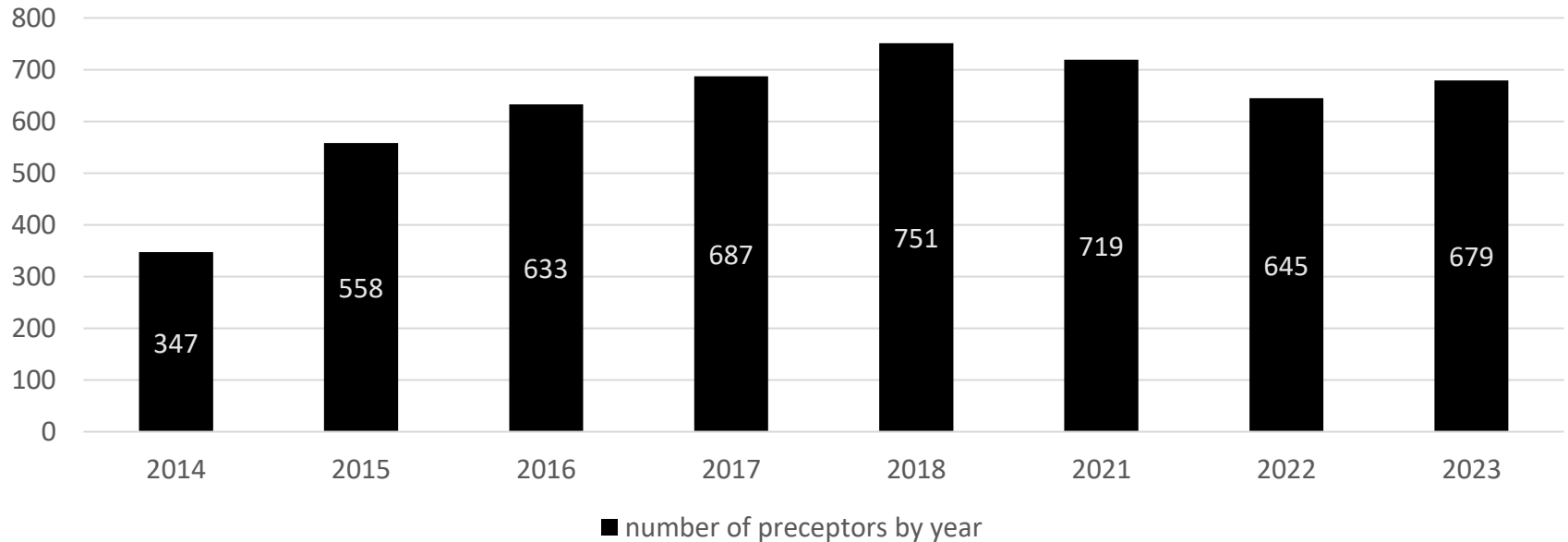


Unique Students by Year



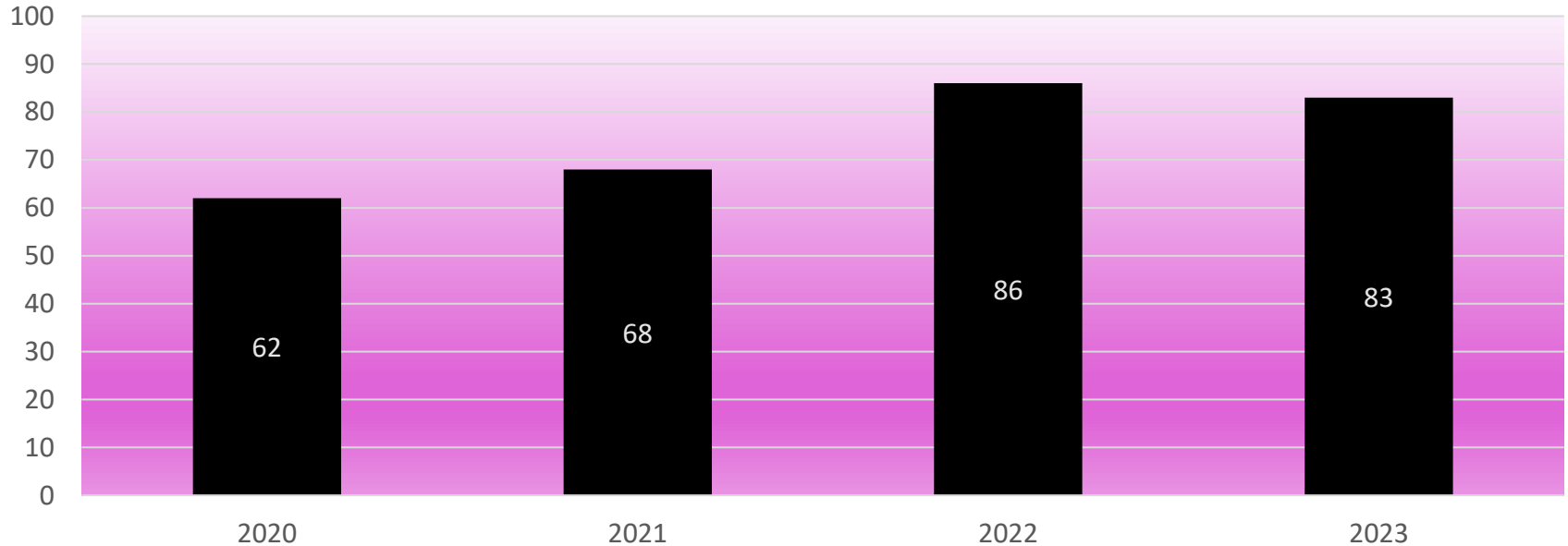
Teaching More with Less

APP Preceptors



APP Programs Sending Students to UPMC

Programs by Year



The Health System / Academic Paradox...

- *Our stake*: Need graduates to fill positions.
- *The practice environment*: More patients, higher acuity, less time, higher cost.
- *The need*: High level, autonomous providers. LOTS of them.
- *The **BIG** problem*: Too many learners, too few spots.
- *The **BIGGER** problem*: Teaching students can mean fewer patients get seen.
- *The **BIGGEST** problem*: Are they ready to practice when hired?

Many Students Rotate. Few Become Hires.

1,055 Unique students rotated in 2021



108 were UPMC APPs in 2023



10.2% Conversion to hire

2022–2023 ROI: 10.5% student-to-employee conversion.

Who Are We Hiring?

<u>Quarter</u>	<u>New Grad</u>	<u>Experienced</u>
Q2 2024	32%	68%
Q1 2025	39%	61%
Q2 2025	45%	55%
Q1 2026	36%	64%

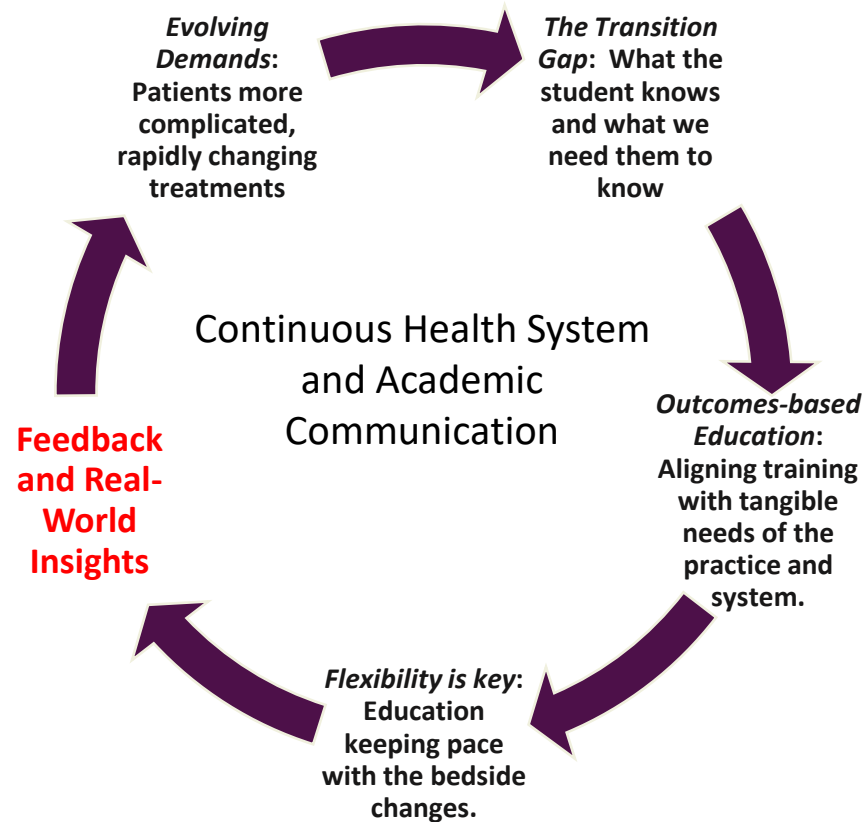
- **700–800 unique APP applications each month for approximately 200–300 open positions (on average).**
- **75% of those applications are new graduates.**

Closing the Transition Gap

Why Health Systems Reinvest After Hire

- Transition Gap: The space between what a new hire knows at graduation or from prior practice and what we need them to succeed.
 - Billing, documentation, clinical judgement
 - Difficult patient and family conversations
 - Specialty specific knowledge gaps
 - Readiness for high risk / high autonomy practice

A Health System–Education Flywheel for Workforce Transformation





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Set up time to meet me!

