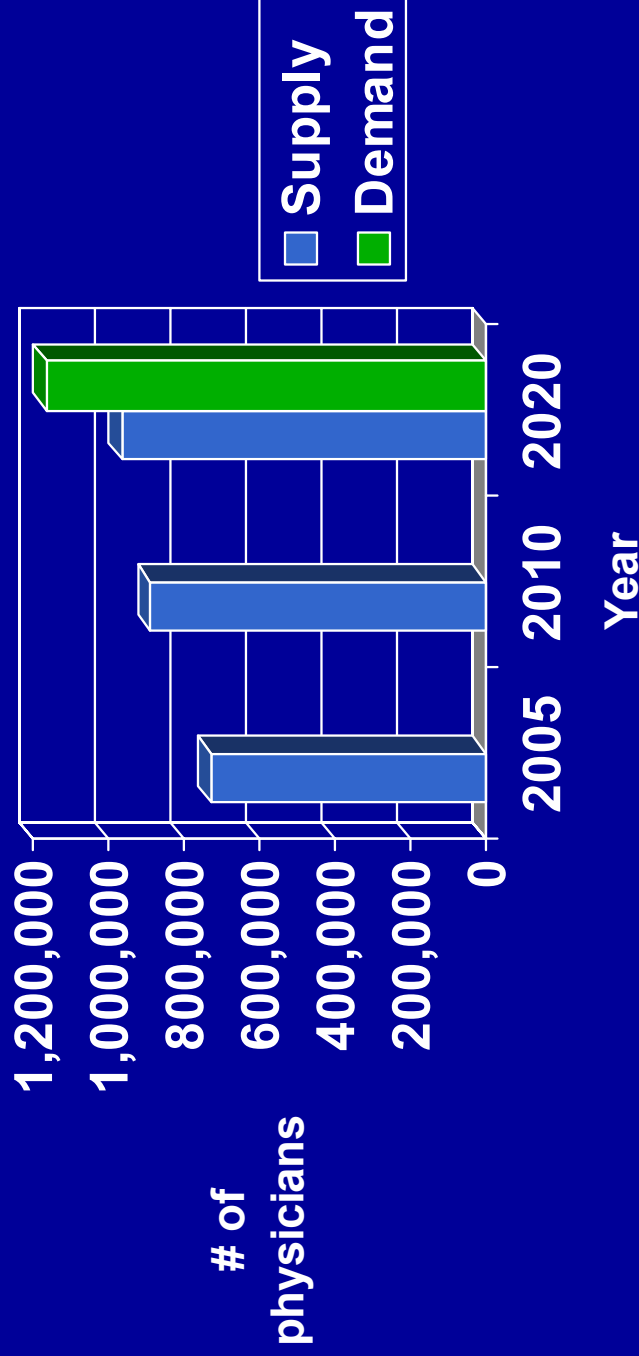


National competition for physicians is fierce and will increase.

Estimated national undersupply is 200,000 physicians by 2020.



May 2005: Association of American Medical Colleges official policy is to increase medical graduates by 3000/year by 2015. If increases are achieved, undersupply is estimated at 162,700.

Greater Cincinnati has an undersupply in 14 Specialties.

- Anatomical/Clinical Pathology
- Cardiovascular Disease
- Neurology
- Pulmonary Diseases
- Diagnostic Radiology
- Neurological Surgery
- Radiation Oncology
- Anesthesiology
- General Surgery
- Ophthalmology
- Colon & Rectal Surgery
- Gastroenterology
- Orthopedic Surgery
- Thoracic Surgery

Greater Cincinnati reflects national shortages in the same specialties.

Medical education system currently does not have the capacity to fill the projected need.

	<i>National graduates annually</i> <i>2002 data</i>	<i>Local grads</i> <i>Estimated from program slots</i>
Cardiology	500*	3
Pathology	537	2
Anesthesiology	1293	6
Neurology	421	4
Neurosurgery	744	2-3
Ophthalmology	457	3
Orthopedic Surgery	606	4

	<i>National graduates annually</i> <i>2002 data</i>	<i>Local grads</i> <i>Estimated from program slots</i>
Psychiatry	1044	10-12
Pulmonology	28*	3-4
Gen Surgery	1009	11
Thoracic Surg	102*	1
Total grads (approx)	16,500	225
Total (approx) specialties and sub specialties only	8900	105

*estimated (program total / # of years)

Efforts need to start during medical school to retain grads.

- There are 8 medical schools within a 150 mile radius of Cincinnati. Total training time for a specialist is 9-12 years.
- Ohio has 4631 medical residents/fellows
- Kentucky has 966 medical residents/fellows
- Indiana has 1197 medical residents/fellows
- Greater Cincinnati area has approx 915 residents/fellows in training and graduates approximately 225 per year.
- A 2004 survey estimates only 33% of specialists stay to practice in Greater Cincinnati. We estimate 42% of all residents/fellows stay in the area.
- A 2006 survey is currently underway.

Medical Resident/Fellow Job Decision Survey

- First survey in May 2004
 - 21 respondents; 18 from Cincinnati
 - Only surveyed sub specialties in undersupply
- Second Survey in June 2006
 - 21 respondents
 - Sent surveys to all local residents and fellows

Survey Results

	Stayed	Left Area	Un-decided	Returned to Hometown
2004	7	14	0	13 (62%)
2006	8	10	3	9 (42%)

Survey Results

- In 2006, 6 of the 7 that stayed were originally from Cincinnati. One was from Grand Rapids, Michigan.
- Of those that left, 3 went to their hometowns, 7 (2 from Cincinnati) went to a different city.
- One of the undecided was from New York and two from Cincinnati.

Survey Results

How important were the following sources in identifying the practice opportunities you pursued?

2004 Survey was done by phone, asking each respondent to rank 25 factors in order of importance.

2006 Survey is online and asks respondents to identify each item as Extremely, Very, Somewhat, or Not Important.

2006**2004**

Importance of Personal Networking	60%	Opinions/information from friends /colleagues	57%
Importance of Internet	35%	Information obtained through websites	48%
Importance of Speciality Society	30%	Information provided by the individual practice	24%
Importance of Residency Program	23%	Opinions/information from instructors/mentors	24%
Importance of cincinnatiMDjobs.com	10%	Opinions/information from family members	24%
Importance of Journal Advertising	10%	Personal Experience	24%
Importance of recruiters	25%	Journals	19%
Importance of Career Fairs	0%	Recruiters	9%
		Mailings	9%

Please rank the PRACTICE factors from the following list that were important to you when comparing and considering different job opportunities.

2006

2004

Adequate Specialty Support	85%	
Sufficient number of colleagues in the practice	75%	11
Perceived fit with colleagues' personalities	70%	1
Frequency you are required to take call	50%	13
Exposure to a variety of medical conditions	50%	15
Office Efficiency	50%	100%
Diversity of staff and patient base	35%	
Electronic Medical Record System	25%	39%
Opportunity to become a partner quickly	22%	9

Please rank the FINANCIAL factors from the following list that were important to you when comparing and considering different job opportunities.

2006 **2004**

Overall compensation package	75%	6
Starting income amount	60%	12
Perceived opportunity for financial growth	60%	7
Reimbursement rates	40%	
Loan repayment	26%	
Cost of malpractice insurance	18%	18

Please rank the FAMILY/PERSONAL factors from the following list that were important to you when comparing and considering different job opportunities.

2006

2004

Spouse/Family preference	55%	4
Proximity to friends or family	55%	
Educational opportunities for self, spouse, or children	55%	Children: 3
		Self or spouse: 21
Good place to raise a family	50%	
Personal familiarity with local area	40%	17
Spousal job opportunities in the area	30%	20
Teaching opportunities	25%	22

Please rank the COMMUNITY/GEOGRAPHIC factors from the following list that were important to you when comparing and considering different job opportunities.

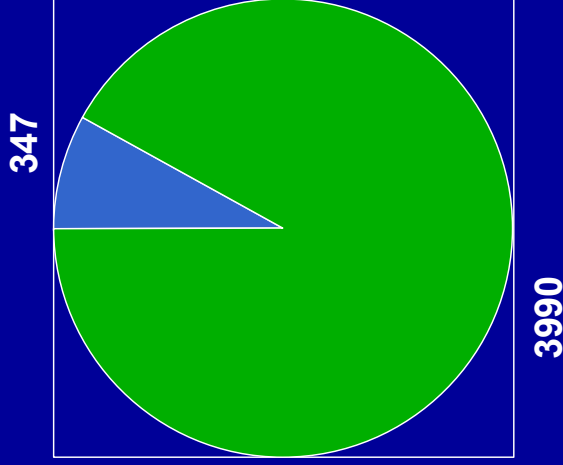
2006 2004

Proximity to metropolitan area	58%	8
Reputation for safety and security	55%	10
Affordable place to live	55%	16
Sufficient demand for new doctors in your specialty	45%	2
Quality of medical care available in the area	45%	5
Cultural/entertainment opportunities	45%	14
Climate	25%	19
Proximity to the ocean, lakes or mountains	16%	23
Sporting events	5%	25

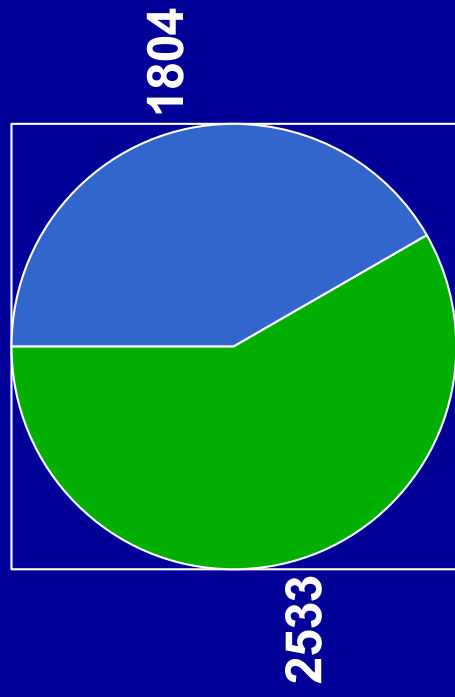
Attrition through retirement more than doubles the current estimated need.

*In the next 15 years 41.6% of our current physicians will reach age 65.
This mirrors the national percentage.*

Practicing physicians
age in 2005



Current physicians
age in 2020



Over age 65 Under age 65

Greater Cincinnati, like the rest of the country has a disproportionate number of African American physicians compared to the population.

- Locally there are 92 (<2%) practicing African American physicians compared to approx 25,000 (3.4%) nationally.

Local African American physician pipeline 2005/2006 year data

Fellows all years	5		
Resident 2006	12	Med Student 2006	11
Resident 2007	10	Med Student 2007	10
Resident 2008	6	Med Student 2008	14
Resident 2009	15	Med Student 2009	21
Resident 2010	4	Total in pipeline	108