

PHYSICIAN SEARCH AND CONSULTING THOUGHT LEADERSHIP RESOURCES



A Review of the Surveys, White Papers, Educational Presentations, White Boards, Articles, Books, and Other Resources Provided by Merritt Hawkins to Clients, Physicians, Media Members, and Policy Makers

www.merritthawkins.com 800-876-0500



PROVIDING VALUE-ADDED DATA AND ANALYSES TO THE HEALTHCARE INDUSTRY

Overview: About Merritt Hawkins

Founded in 1987, Merritt Hawkins is the leading physician search and consulting firm in the United States. As a company of AMN Healthcare (NYSE: AMN), Merritt Hawkins is part of the largest healthcare staffing organization in the country and the leader in innovative healthcare workforce solutions. Employing over to 3,000 people in offices nationwide, AMN Healthcare is comprised of multiple health care staffing brands, including American Mobile Nurses, Merritt Hawkins, Staff Care, Med Travelers, Nurse Finders and others. Together, these companies offer a comprehensive range of clinical staffing services – a total staffing solution.

THOUGHT LEADERSHIP RESOURCES

In addition to providing physician search and consulting services, Merritt Hawkins generates data and analyses that have become standard benchmarks and reference points for health care professionals throughout the county. These resources are developed both in order to provide our associates with the information they need to be effective in the market place, and to help inform fellow health care professionals regarding trends in the health care staffing market.

Third parties such as federal government entities, non-profit groups, and universities now retain Merritt Hawkins to conduct thought leadership projects on their behalf.

Referenced in media outlets including *The Wall Street Journal*, *The New York Times*, *USA Today*, *Fortune*, *Forbes*, and many others, this information is derived from various surveys, white papers, educational programs, articles, and other sources, which are reviewed on the following pages.

MERRITT HAWKINS SURVEYS

Merritt Hawkins conducts a variety of surveys in order to monitor trends in physician compensation, career preferences and related areas. These surveys include:

Merritt Hawkins Review of Physician Recruiting Incentives

This annual Review, now in its 24th year, summarizes the incentives that Merritt Hawkins' clients offer when recruiting physicians to permanent practice opportunities. The survey includes low, average, and high base salaries and other benefits, including signing bonuses, relocation allowances and CME. Referenced each year in *Modern Healthcare's* annual physician compensation issue and many other publications, the Review is a standard benchmark hospitals and other organizations throughout the county look to when developing physician recruiting incentive packages.



Merritt Hawkins Survey of Physician Inpatient/Outpatient Revenue

In this periodic survey of hospital chief financial officers, Merritt Hawkins tracks the average net inpatient and outpatient revenue physicians in 18 specialties generate each year on behalf of their affiliated hospitals. The survey report includes a cost benefits analysis showing revenue generated by physicians for hospitals versus the average salaries paid to physicians. The survey

generates both national media interest and is highly anticipated by hospital administrators, physician recruiters, policy makers and others tracking the impact of physicians on hospital revenues.

Merritt Hawkins Survey of Physician Appointment Wait Times

First conducted in 2004, this survey captures the average number of days it takes for new patients to schedule appointments with physicians in various specialties in 15 major metro markets. The survey received nationwide attention by underlining the current demand for physician services and the extended periods of time it takes many patients to obtain physician access and has been cited by *USA Today*, *The Washington Post*, *The New York Times*, *Forbes* and many other media outlets.

Merritt Hawkins Survey of Final-Year Medical Residents

Conducted every other year, this survey captures the career preferences and the prevailing mindset of physicians about to complete their residency training. The survey provides insights that may be helpful to hospitals or other organizations interested in recruiting physicians about to enter the medical profession and reflects the interest and concerns of young physicians today.

SURVEYS CONDUCTED FOR THIRD PARTIES BY MERRITT HAWKINS

Based on Merritt Hawkins' ability to access physicians, and on our track record of producing insightful data and analysis, we have been selected to conduct surveys by a variety of organizations. Surveys we have conducted for third parties include:

A Survey of America's Physicians: Practice Patterns and Perspectives

This landmark survey, conducted by Merritt Hawkins on behalf of **The Physicians Foundation** (www.physiciansfoundation.org), provides a unique "state of the union" of the medical profession. Sent to over 650,000 physicians, the survey tracks the morale levels, practice metrics and career plans of America's physicians. With over one million data points and a less than one percent error rate, A Survey of America's Physicians has proven to be an invaluable source of insight for healthcare executives, journalists, policy makers and is continually cited in publications ranging from *The Wall Street Journal* to *Health Affairs*. Conducted on a biennial basis, the survey will next be completed in 2018.



Survey of Physician Assistant Salaries, Signing Bonuses & Related Incentives

This survey examines the salaries, signing bonuses and other recruiting incentives and benefits offered by various types of employers to physician assistants (PAs). The survey was conducted by Merritt Hawkins in conjunction with the **American Academy of Physician Assistants** (AAPA) which requested data on the recruiting incentives currently being offered to recruit PAs.

Survey of PA Recruiting and Employment Trends

Conducted in 2016, this is the second survey Merritt Hawkins completed on behalf of the **American Academy of Physician Assistants** (AAPA). The survey offers insight into the number of hospitals currently recruiting PAs, their reasons for doing so, the role of PAs at their facilities and related information.

A Survey of Indian Health Service Physician Practice Patterns and Satisfaction

Merritt Hawkins was selected by the **Indian Health Service** to conduct a survey of physicians practicing at Indian Health facilities nationwide. The survey examines the career satisfaction of Indian Health physicians, tracks their practice patterns and contrasts Indian Health medical

practice to medical practice in the private sector. Merritt Hawkins also conducted a second survey of Indian Health facility administrators examining their staffing challenges and concerns.

Survey of AASA Member Compensation, Career Satisfaction and Personal Perspectives

Merritt Hawkins was selected by the **Association of Academic Surgical Administrators (AASA)** to conduct a survey of the compensation levels of its members. The survey marks an expanded version of previous AASA surveys by including both compensation information and, for the first time, responses concerning the career satisfaction and personal perspectives of AASA members. Merritt Hawkins now conducts the survey for AASA on an annual basis.

Trinity University Survey of Alumni Satisfaction & Health System Trends

Merritt Hawkins was selected by **Trinity University's Department of Healthcare Administration** to conduct a survey of the Department's alumni, the great majority of whom now serve as healthcare facility administrators. The survey tracks the morale levels and perspectives of administrators who now serve on the front lines of hospital, medical group and other healthcare facility management, examining the challenges they face and their perspectives on health reform and related health system changes.

AMGO Survey of Membership Compensation, Career Satisfaction and Personal Perspectives

Merritt Hawkins was selected by the **Association of Managers of Gynecology and Obstetrics (AMGO)** to conduct this survey of AMGO's members, examining methods by which they are compensated, career satisfaction levels and related data. Merritt Hawkins conducts the survey for AMGO on an annual basis.

TESTIMONY BEFORE THE CONGRESS OF THE UNITED STATES

In a unique honor, Merritt Hawkins was chosen to provide expert testimony before a Congressional hearing in Washington, D.C. On July 19, 2012, Merritt Hawkins president Mark Smith testified before the House of Representatives Committee on Small Business regarding "The Decline of Solo and Small Medical Practice." Speaking with other distinguished panel members, Mr. Smith explained how medical practice is evolving away from the traditional independent model toward the "corporate" model, and how this is affecting quality and access to care. Mr. Smith's testimony was read into the Congressional record and a copy of his remarks is available by contacting Merritt Hawkins at 800-876-0500.



Merritt Hawkins was subsequently invited to admit expert testimony and commentary before Congressional Subcommittees on two other occasions, both in 2015. Merritt Hawkins commentary was submitted to the House Committee on Veterans' Affairs Subcommittees on Health and Economic Opportunity and included recommendations regarding how the VA can create a more effective physician recruiting process.

MERRITT HAWKINS PHYSICIAN ACCESS INDEX

With physician shortages continuing to be a challenge for healthcare providers nationwide, Merritt Hawkins developed an objective method for measuring the ability of patients to access physicians and advanced practitioners by state. Our unique Physician Access Index uses 33 separate

metrics to determine the ability of patients to access physicians in each of the 50 states. These metrics range from physician-to-population ratios to insurance rates, economic status and many others.

Each state is given a ranking based on these metrics determining where it stands in the physician access continuum. Massachusetts ranks first with the most positive physician access metrics while Oklahoma ranks last with the least positive access metrics. The Physician Access Index offers healthcare executives, policy planners, physicians, media members and others a compendium of physician supply and demand data clearly illustrating the disparity in physician access that exists nationwide.



MERRITT HAWKINS WHITE PAPERS

Merritt Hawkins has completed white papers on a wide range of physician and healthcare related topics that provide our consultants, clients, policy makers and others with key insights into developments important to healthcare delivery. These white papers include:

Structuring an Effective Physician Interview

It takes a considerable amount of time and resources in today's market to identify physician recruiting candidates and schedule them for on-site interviews. This white paper details how hospitals, medical groups and other facilities can structure successful physician interviews by focusing on the front-end preparation needed to ensure that interviews are productive and lead to consistently positive outcomes.

The Cost of a Physician Vacancy

What is the "opportunity cost" for hospitals, medical groups and other healthcare facilities when a medical staff position goes unfilled? Using data derived from Merritt Hawkins' Physicians Inpatient/Outpatient Revenue Survey, this white paper answer that question, detailing the financial and operational impact of physician vacancies.

The Growing Recruitment of Hospitalists

The use of physicians who focus solely on hospital inpatient care is a relatively new development. This white paper reviews the rise over the last two decades of the hospitalist physician – who they are, how many there are, why they are being used and methods for recruiting them.

The Changing Landscape in Academic Physician Recruiting

The recruitment of physicians and physician leaders at academic medical centers has followed traditional methods and patterns that may no longer be appropriate or effective in today's rapidly changing market. This white paper details how academic medical center recruitment is evolving and embracing new methods to meet new challenges.

Demonstrating Community Need for Physicians

How many physicians does a community need? There is no quick answer to this question, which varies depending on the demographics, economics, and medical practice patterns of each community. This white paper explains the methods used to demonstrate community need for physicians in various specialties, including but also going beyond physician-to-population ratios.

MACRA: A New Medicare Reimbursement Method for Physicians

Reimbursement models in healthcare today are moving away from traditional fee-for-service metrics and toward quality/value-based formulas. This movement was greatly accelerated when Congress passed the Medicare and CHIP Reauthorization Act (MACRA) which revises how

physicians are paid by Medicare. This white paper details the new Medicare formula for reimbursing physicians and examines its potential effects on physician recruiting.

Rural Physician Recruiting Challenges and Solutions

There are now well over 6,000 federally designated Healthcare Professional Shortage Areas (HPSAs) in the United States, many of them in rural communities. Rural hospitals, community health centers, and other facilities continue to face steep challenges when it comes to identifying and recruiting physicians who are amenable to rural medical practice. This white paper offers a series of recommendations and best practices rural facilities can implement to enhance their physician recruiting success.

Physician Recruiting and Federally Qualified Health Centers (FQHCs): Challenges and Best Practices

Federally Qualified Health Centers (FQHCs) have become a vital part of the healthcare safety net, providing care to over 24 million patients annually in over 9,000 sites of service. ***Merritt Hawkins is proud to be the preferred partner for permanent physician recruiting of the National Association of Community Health Centers (NACHC)*** and to work with FQHCs nationwide. In this white paper we detail the unique physician recruiting challenges FQHCs face and how they can address these challenges.

Ten Keys to Enhancing Physician Relations and Reducing Physician Burnout and Turnover

The physician workforce today is undergoing a profound transformation as physicians move away from the traditional private practice model and toward employment by hospitals, medical groups and other facilities. One result of this trend is increased medical staff turnover. In this white paper, Merritt Hawkins suggests best practices healthcare facilities can use to enhance physician relations and improve physician retention and alignment.

Physician Supply Comparisons: Physicians by Select Specialties Practicing in Each State and Licensed in Each State

This white paper provides useful data to hospitals, medical groups and other facilities looking to determine how many physicians in particular specialties there are available for recruitment. It shows the number of physicians in particular states and the number who are licensed in those states but may be practicing elsewhere, thereby identifying “high value” candidates.

Hospital Trustee Guide: Physician Relations, Recruiting and Retention

Physician recruiting is a strategic priority for most hospitals, and often hospital board members are involved in the process. The more board members know about the current physician recruiting market, the more helpful and involved they can be. This white paper offers hospital trustees a primer on the physician market and on current physician recruiting and retention strategies.

The Economic Impact of Physicians

As the “quarterbacks” of the healthcare delivery team, physicians play a decisive role in maintaining and enhancing the quality of care patients receive. However, they also have a profound economic impact on their hospitals and communities. In this white paper, Merritt Hawkins reviews several studies that underscore the important contributions physicians make to the local economic development of their communities and to their affiliated hospitals, including, on average, \$2.2 million in economic activity annually.

Population Health Management and Clinical Staffing

The concept of population health management, a system in which team-based groups of providers work to improve healthcare coverage for large patient groups, is gaining momentum. In this white paper, Merritt Hawkins examines the development of population health management, the rationale behind it, and how healthcare organizations are implementing and staffing this emerging delivery model.

Telehealth: The Integration of Telecommunication into Patient/Provider Encounters

Significant developments in examination and communication devices and techniques, particularly over the latter half of the twentieth century, have expanded options available to providers when consulting with patients. In this white paper, Merritt Hawkins examines the history and scope of telehealth, current applications, staffing considerations, and how telehealth will continue to supplement the care physicians provide to their patients, particularly in rural and remote access areas.

Convenient Care: Growth and Staffing Trends in Urgent Care and Retail Medicine

Healthcare is shifting to a convenient care/outpatient model with a wider menu of niche providers to suit varying customer preferences. In this white paper, Merritt Hawkins examines the development of convenient care, with an emphasis on urgent care centers and retail clinics, examining their purpose, growth and clinical staffing requirements.

Physician and Hospital Reimbursement: From “Lodge Medicine” to MIPS

Both physician and hospital priorities and practices have been shaped by shifting methods of reimbursement, and reimbursement patterns and models remain the key to understanding why healthcare is delivered the way that it is. In this white paper, Merritt Hawkins traces how compensation for physician and hospital services has evolved through the years, and we examine the profound ways in which new reimbursement models are transforming the healthcare delivery system in today’s era of healthcare reform.

How to Assess a Medical Practice Opportunity

Many physicians, particularly medical residents, struggle in the process of selecting a medical practice that is right for them. In this white paper, Merritt Hawkins reviews how physicians can ensure they select a practice opportunity that will meet their personal and professional needs by gathering the information they will need to make an informed decision.

Optometrists and the Emerging Vision Market

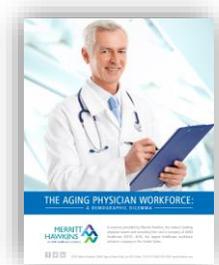
A wide range of factors are shaping supply and demand for optometrists today. In this white paper, Merritt Hawkins examines these factors and how the growth of optometry care in retail settings is reshaping the market.

Psychiatry: “The Silent Shortage”

The shortage of psychiatrists and mental health coverage goes largely unnoticed, and is therefore referred to as a “silent shortage”. In this white paper, Merritt Hawkins outlines the growing gap between supply of psychiatrists and the need for increased mental health care.

The Aging Physician Workforce: A Demographic Dilemma

With an aging general population in need of medical coverage, and an aging physician population nearing retirement, the healthcare system is facing a profound demographic dilemma: who will provide care to the elderly when physicians themselves age out of the workforce? In this white paper, Merritt Hawkins examines physician and population aging trends by state and by specialty, looks at healthcare utilization by age, and reveals some of the reasons a growing number of physicians are likely to retire.



Nurse Practitioners and Physician Assistants: Supply, Distribution, and Scope of Practice Considerations

As physician shortages persist and as delivery evolves toward the team-based model, physician assistants and nurse practitioners will become an increasingly important part of hospital, medical group, FQHC, and other healthcare facility staffing plans. In this white paper, Merritt Hawkins explores the level of autonomy, prescribing authority, physician supervision and other concerns of NPs and PAs.

The Physician Shortage: Data Points and State Rankings

Is the United States facing a shortage of physicians? Most healthcare policy analysts, academics and others who study this question believe that it is, and that the shortage is likely to become more pronounced over the next five to ten years. In this white paper, Merritt Hawkins provides data points regarding the shortage and includes state rankings and other information showing the current state of physician supply and demand.

Physician Supply Considerations: The Emerging Shortage of Medical Specialists

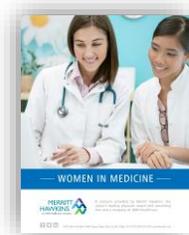
When considering physician supply in the United States, analysts and academics are near unanimous in their projection of current and growing shortages in the area of primary care. What is less commonly known is that shortages of medical specialists also have been widely projected. In this white paper, Merritt Hawkins explores the trends and data underlining the emerging shortage of medical specialists.

RVU FAQ: Understanding RVU Compensation in Physician Employment Agreements

As the nation's leading physician search and consulting firm, Merritt Hawkins receives numerous inquiries from physicians and from hospital and medical group managers about Relative Value Units (RVUs). In this white paper, Merritt Hawkins provides answers to frequently asked questions about RVUs and explains concepts important to physicians evaluating their contracts and to employers considering the performance metrics by which they evaluate and compensate physicians.

Women in Medicine

One of the greatest hallmarks of the latter half of the 20th century and into the 21st century has been the significant progress that has been made in the area of gender equality, particularly in regards to employment opportunities. This progress is prominently noticeable in the field of medicine. In this white paper, Merritt Hawkins examines the history of females in medicine, distribution of female physicians among specialties and states, practice, salary and work considerations, and projects how the growth of female physicians will change the composition of the physician workforce.



Incentive Based Physician Compensation

The health system today is shifting away from traditional, volume based reimbursement for physicians toward models that incorporate quality and efficiency metrics. This white paper examines this important trend and includes examples of compensation structures that include both volume based metrics such as RVUs and value/efficiency based metrics.

Immigration and International Medical Graduates/FAQ

This white paper, in "frequently asked question" format, was prepared for Merritt Hawkins by Carl Shusterman, an immigration attorney nationally acknowledged for his health care immigration law expertise. The analysis explains the immigration requirements that international medical graduates (IMGs) and Canadian physicians must meet and also explains the role and duties of employers seeking to recruit them.

A Review of Federal Physician Recruiting Laws and Regulations

This in-depth analysis was prepared for Merritt Hawkins with the assistance of attorneys experienced in federal laws pertaining to physician recruiting. The analysis reviews the history of federal physician recruiting laws and regulations and outlines which recruiting incentives are permissible and which are not. It provides a valuable resource for any hospital seeking to comply with current federal physician recruiting regulations.

MERRITT HAWKINS RESEARCH PROJECTS COMPLETED FOR THIRD PARTIES

In addition to producing its own white papers and analysis, Merritt Hawkins is retained by third parties to complete research projects and analysis pertaining to physician practice patterns, physician demographics, and related topics. Research projects completed by Merritt Hawkins for third parties include:

Health Reform and the Decline of Physician Private Practice

A landmark white paper prepared by Merritt Hawkins on behalf of **The Physicians Foundation**, *Health Reform and the Decline of Physician Private Practice* incorporates the views of a panel of distinguished healthcare experts to project how the Patient Protection and Affordable Care Act will reshape medical practice in America. The white paper includes case studies of concierge practices, medical homes, accountable care organizations, community health centers and other emerging practice models and comments on how the physician workforce can be extended to accommodate the rising demand for healthcare services.



Physician Demographic Study: An Examination of Physician Distribution, Demographics, and Practice Patterns in a 42-County Area of North Texas

Prepared by Merritt Hawkins for the **North Texas Regional Extension Center/Office of the National Coordinator of Health Information Technology**, this study examines the physician workforce in North Texas, showing number of physicians by country, practice patterns and affiliations, distribution patterns and a wide range of other data.

The Physician Workforce in Texas: An Examination of Physician Distribution, Access, Demographics, Affiliations and Practice Patterns in Texas' 254 Counties

The second research project completed by Merritt Hawkins on behalf of the **North Texas Regional Extension Center/Office of the National Coordinator of Health Information Technology**, this study provides a comprehensive look at physician demographics, distribution and affiliation of Texas' 47,000 practicing physicians. Results of the study, including the fact that 185 Texas counties have no psychiatrist, and other data points have been repeatedly referenced in the media and used by policy makers to advocate for expanded physician training in Texas.

Trustee Guidebook: Physicians and Clinical Staff

Merritt Hawkins was a key content provider for this booklet prepared in partnership with the **Texas Hospital Trustees**, as part of their series of guidebooks for hospital board members. The guidebook reviews the key issues pertaining to physician staffing that are important to trustees, including current trends in physician supply and demand, compensation structures, recruiting methods, and related matters.

JOURNAL ARTICLES AUTHORED BY MERRITT HAWKINS

Merritt Hawkins executives have authored well over 100 articles that have been published in a wide range of healthcare and general interest publications. Recent articles authored by Merritt Hawkins executives include:

The Medical Profession's Future: A Struggle Between Caring for Patients and Bottom-Line Pressures

Published in the prestigious journal *Health Affairs*, this article uses data from the landmark *Survey of America's Physicians* conducted by Merritt Hawkins for The Physicians Foundation to examine the future of the medical profession and how physician practice patterns and attitudes are changing. The paper was presented by a Merritt Hawkins executive as part of a panel discussion made before an audience of healthcare policy makers and journalists at the **National Press Club** in Washington, D.C.



The Physician Employment Trend: What You Need to Know

Executives with Merritt Hawkins address the growing employment of physicians by hospitals and other organizations in this article published in **Family Practice Management**, the official publication of the American Academy of Family Physicians (AAFP). The article traces the reasons for the increased employment of physicians and how this trend is likely to affect physician practice patterns and morale.

The Economic Role of Physicians in Today's Evolving Healthcare System

In this article, published by **The Journal of Medical Practice Management**, executives with Merritt Hawkins examine the traditional economic role of physicians in the fee-for-service delivery model and how that role may change with the adoption of value/quality-based delivery models.

Physician Reimbursement: From Fee-for-Service to MACRA, MIPS and APMs

Merritt Hawkins executives trace the evolution of physician reimbursement models, from the "golden age of fee-for-service" to Medicare's new physician reimbursement formula in this article published by **The Journal of Medical Practice Management**.

Employment Contracts for Family Physicians in an Evolving Market.

In this article, published in **Family Practice Management**, Merritt Hawkins executives detail the typical components of contracts for family practice physicians, including salaries, signing bonuses, production bonuses, non-competes, termination clauses and other components. In addition to authoring this article, Merritt Hawkins executives have addressed AAFP membership multiple times on the topic of employment contracts.

Our Fragile, Fragmented Physician Workforce: How to Keep Today's Physicians Engaged and Productive

Published in **The Journal of Medical Practice Management**, this article by Merritt Hawkins executives looks at the uncertain state of the physician workforce today, including why many physicians have mixed feelings about the practice of medicine and how medical groups, hospitals and other organizations that employ physicians can help them reengage with their profession and enjoy medicine again.

PHYSICIAN-TO-POPULATION RATIOS

A Compendium of Suggested Physician-to-Population Ratios Provided by the Nation's Leading Physician Search and Consulting Firm

There are a variety of ratios that have been developed by academics and others that suggest how many physicians in various specialties are required per 100,000 population. Merritt Hawkins compiles several of these ratios in this document. Included among them are ratios developed by the late Richard "Buz" Cooper, M.D. of the University of Pennsylvania, for years one of the nation's leading experts on physician utilization and access issues. Dr. Cooper worked closely with Merritt

Hawkins to develop a practical model for assessing physician community need and completed a variety of community needs assessment studies on behalf of various hospitals.

Dr. Cooper's ratios are the most recent and relevant of the ratios traditionally used to determine community need for physicians. They also are based on an economic model that calculates how many physicians in various specialties communities can support, rather than how many communities may theoretically need. This is a valuable tool for hospitals and other entities seeking to determine community need for physicians.

A COMPILATION OF PHYSICIAN COMPENSATION DATA

In this document, Merritt Hawkins includes physician compensation data from several physician compensation surveys, including its own *Review of Physician and Advanced Practitioner Recruiting Incentives*. The various surveys offer a range of both starting physician salaries, as tracked by Merritt Hawkins, as well as overall physician compensation as tracked by other data sources. This is a highly useful resource for those seeking current data on physician compensation by specialty.

PHYSICIAN GENERATED REVENUE CHART

Using data from its *Survey of Physician Inpatient/Outpatient Revenue*, Merritt Hawkins has developed a chart that indicates the amount of revenue physicians in various specialties generate on behalf of their affiliated hospitals pro-rated by month, from one month to 36 months. The chart allows hospital executives to quickly determine how much revenue is potentially lost when an orthopedic surgeon, cardiologist, family medicine doctor, or other type of medical staff position remains open for a given period of time.

PHYSICIAN STAFFING SLIDE RULE

This convenient, hand-held chart allows the user to determine at a glance how many physicians there are in various specialties, what percent are board certified, what percent are international medical graduates, what percent are 55 years old or older, and other data. Originally developed by Merritt Hawkins (and now widely imitated) the Physician Staffing Slide Rule offers an easy way to view key characteristics of the physician workforce.

WHITE BOARD: "DOCTORS, DOLLARS AND HEALTH REFORM"

This animated video offers an engaging, unique way to follow some of the latest trends in physician recruiting incentives and compensation. Using witty illustrations and a fast-paced narrative, the video illustrates how physician compensation is changing in the era of health reform.



SPEAKING PRESENTATIONS

Merritt Hawkins presents a series of educational programs regarding physician staffing and related issues before dozens of healthcare professionals groups each year. Content-oriented and devoid of commercial messages, these programs offer both a strategic overview and hands on recommendations regarding various aspects of health care staffing.

Titles of programs we recently have presented include:

- **Doctors, Dollars, and Health Reform: Physician Reimbursement from Fee-For-Service to MIPS**
- **The Problem is Poverty: Why Poverty and Income Inequality Are at the Core of America's High Health Care Spending**
- **The Rise of Convenient Care, Retail Clinics, Healthcare Apps, and Robots**
- **Medical Practice in America: Past, Present, and Future**
- **Our Fragile, Fragmented Physician Workforce: Trends in 2017 and Beyond**
- **The Physician Recruiting Iceberg**
- **Will the Last Physician in America Please Turn Off the Lights? A Look at America's Looming Physician Shortage**
- **Physicians and Hospital: The Quest for Common Ground**
- **Dr. Generation X: How New Physicians are Changing the Face of Medicine**

These programs have recently been presented before dozens of healthcare professional organizations, including chapters of the Medical Group Management Association, multiple state hospital associations, chapters of the Healthcare Financial Management Association, state primary care associations, state medical societies and other groups.

MEDIA CITATIONS

Merritt Hawkins executives and data have been cited in thousands of articles appearing in healthcare and general media outlets over the last 30 years and continue to be widely referenced on a variety of healthcare related topics. Recent articles citing Merritt Hawkins include:

- ◆ **Nurse Practitioner Demand Eclipses Doctors...**Forbes
- ◆ **Why it's hard to find a mental health professional...**Washington Post
- ◆ **Ten Things Medical Schools Won't Tell You...**Wall Street Journal
- ◆ **Travel ban sows uncertainty for healthcare...**Modern Healthcare
- ◆ **A Silent Exodus of Physicians...**Hospitals & Health Networks
- ◆ **Young Doctors Worry About Their Careers...**New York Times
- ◆ **Nursing Specialists Can Earn More Than Doctors...**U.S. News & World Report
- ◆ **Why the Doctor Can't See You...**Wall Street Journal
- ◆ **Primary Care Compensation on the Rise...**HealthLeaders
- ◆ **Physician numbers up under Obamacare...**USA Today
- ◆ **Bipartisan Healthcare Solution That Keeps Dying...**Huffington Post



BOOKS WRITTEN BY MERRITT HAWKINS

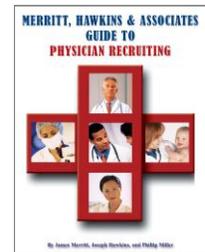
Merritt Hawkins is the only physician search firm in the industry to author and publish books on a variety of physician related topics. Four books authored by Merritt Hawkins executives include:

Will the Last Physician in American Please Turn Off the Lights? A Look at America's Looming Physician Shortage

Merritt Hawkins has long been a voice in the national debate over physician supply. For years, academics and others have argued that the United States has too many physicians and needs to reduce the number being trained. Virtually since its inception in 1987, Merritt Hawkins has been arguing for the opposite point of view – that we have too few physicians and need to train more. That is the central argument of *Will the Last Physician in America Please Turn Off the Lights? A Look at America's Looming Physician Shortage*, a book written by Merritt Hawkins in 2004, and one of the first calls for an increase in physician training.

Merritt Hawkins' Guide to Physician Recruiting

With 30 years of experience recruiting quality healthcare professionals nationwide, Merritt Hawkins pioneered a consultative, resource based approach to physician recruiting that remains unique in the industry. Merritt Hawkins literally “wrote the book on physician recruiting.” *Merritt Hawkins' Guide to Physician Recruiting*, contains a wealth of information concerning the best strategies for ensuring physician recruiting success.



Writing for *MEDINNOVATIONBLOG*, Richard L. Reece, MD said: “Every once in a while a book comes down the pike that is worth every cent...*Merritt Hawkins' Guide to Physician Recruiting* is such a book.”

In Their Own Words: 12,000 Physicians Reveal Their Thoughts on Medical Practice in America

In partnership with The Physicians Foundation, Merritt Hawkins authored the book, *In Their Own Words: 12,000 Physicians Reveal Their Thoughts on Medical Practice in America*. The book includes the results of a national physician survey Merritt Hawkins conducted on behalf of The Physicians Foundation as well as comments from hundreds of physicians regarding their view of medical practice in America today

Launching Your Medical Career

Merritt Hawkins has also produced a career guidebook for physicians entitled, *Launching Your Medical Career*. This informative guide offers tips on how to write a CV, how to interview, how to assess a practice opportunity and related information to help physicians navigate through their search for the right practice opportunity.

For more information about Merritt Hawkins' services, thought leadership resources and track record, please contact:



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