



University of California
San Francisco



Emerging Trends in California's RN Labor Market

April 19, 2016

Today's presenters

- Joanne Spetz
 - Professor, Philip R. Lee Institute for Health Policy Studies, University of California, San Francisco
- Judee Berg
 - Executive Director, HealthImpact
- Teri Hollingsworth
 - Vice President, Human Resources Services, Hospital Association of Southern California
- Nikki West
 - Program Director, HealthImpact

Goals for this webinar

- Assess how rising demand for health care services is affecting demand for RNs in California
 - Learn how Chief Nursing Officers perceive the current RN labor market
 - Track the latest hospital vacancy and turnover data
 - Understand how recently-graduated nurses are faring
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- Assess next steps for ensuring an adequate nurse supply

The work presented today is supported by...

■ Funders

- Betty Irene Moore Nursing Initiative
- Kaiser Permanente Northern California Patient Care Services and Kaiser Permanente Nurse Scholar Academy
- California Board of Registered Nursing

■ Acknowledgements & thanks to...

- Association of California Nurse Leaders
- California Student Nurses Association
- California Hospital Association
- Hospital Council of Northern & Central California
- FutureSense Inc.
- Hospital Association of San Diego & Imperial Counties
- UCSF Staff & Interns: Tim Bates, Lela Chu, Lyubov Loza, Nachu Amah

What is going on in our RN labor market?

- Reports of nurse surplus 2009-now
 - Newspaper stories of new graduates who are unemployed
 - Shortage may not have ended in some states
- Emerging reports of shortage 2014-now
 - Anecdotes about using more contract nurses
 - Potential mismatch between needs and skills
- What will happen next?

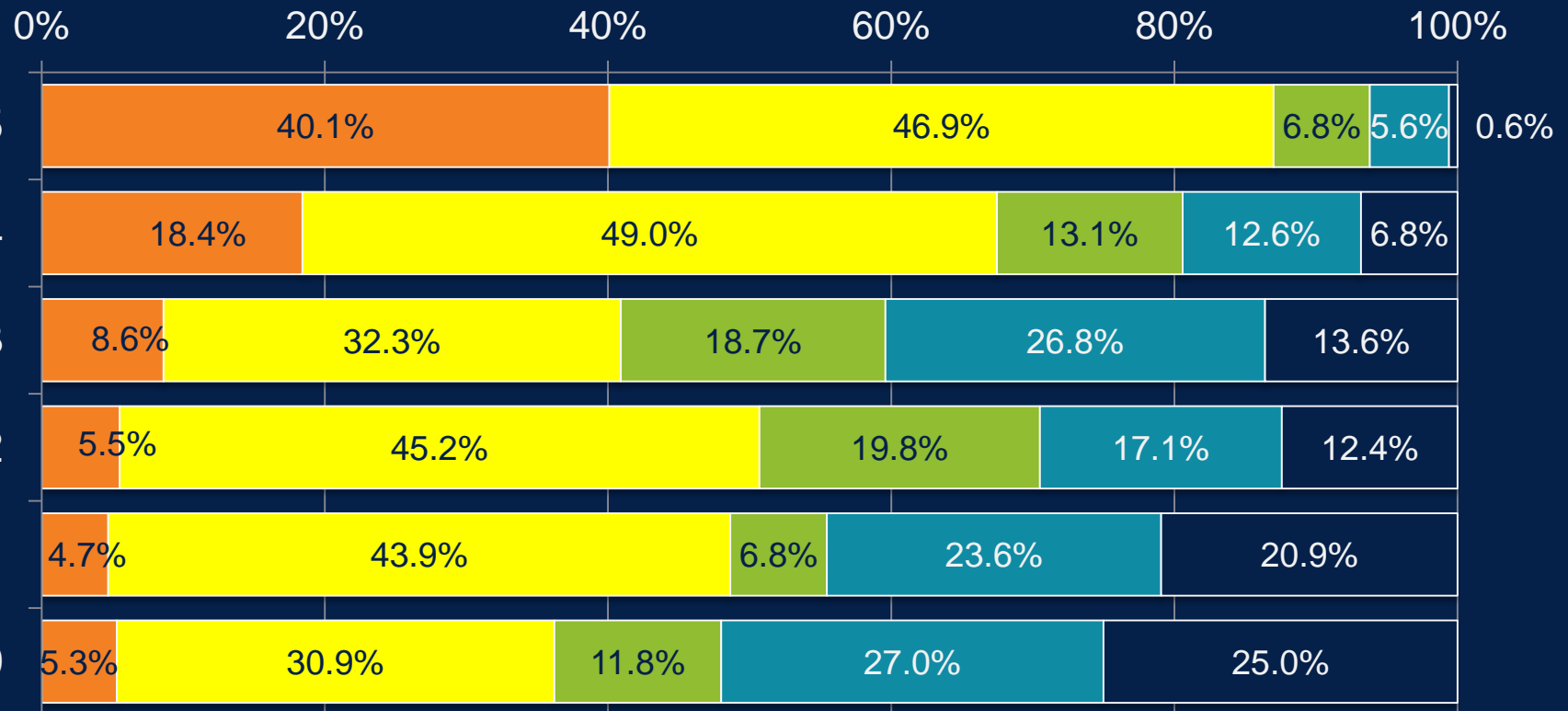
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Survey of Chief Nursing Officers

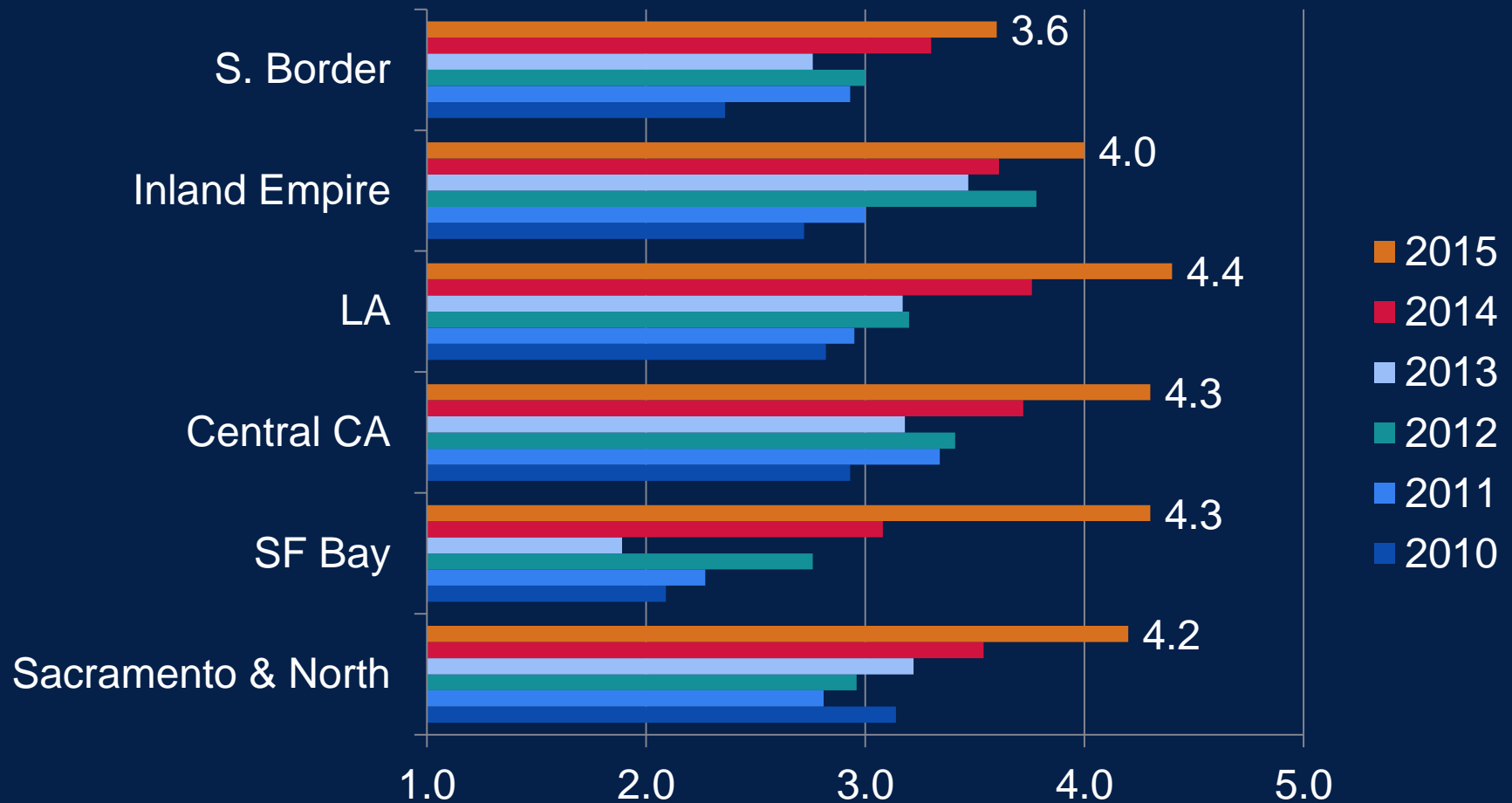
- Fielded by UCSF
- Web-based survey with option to return paper survey via fax or email
- 8 surveys conducted
 - Fall 2010, Spring 2011, Fall 2011, Spring 2012, Fall 2012, Fall 2013, Fall 2014, Fall 2015
 - Fall 2015 survey: 210 facilities represented

Perceptions of employers: Overall labor market

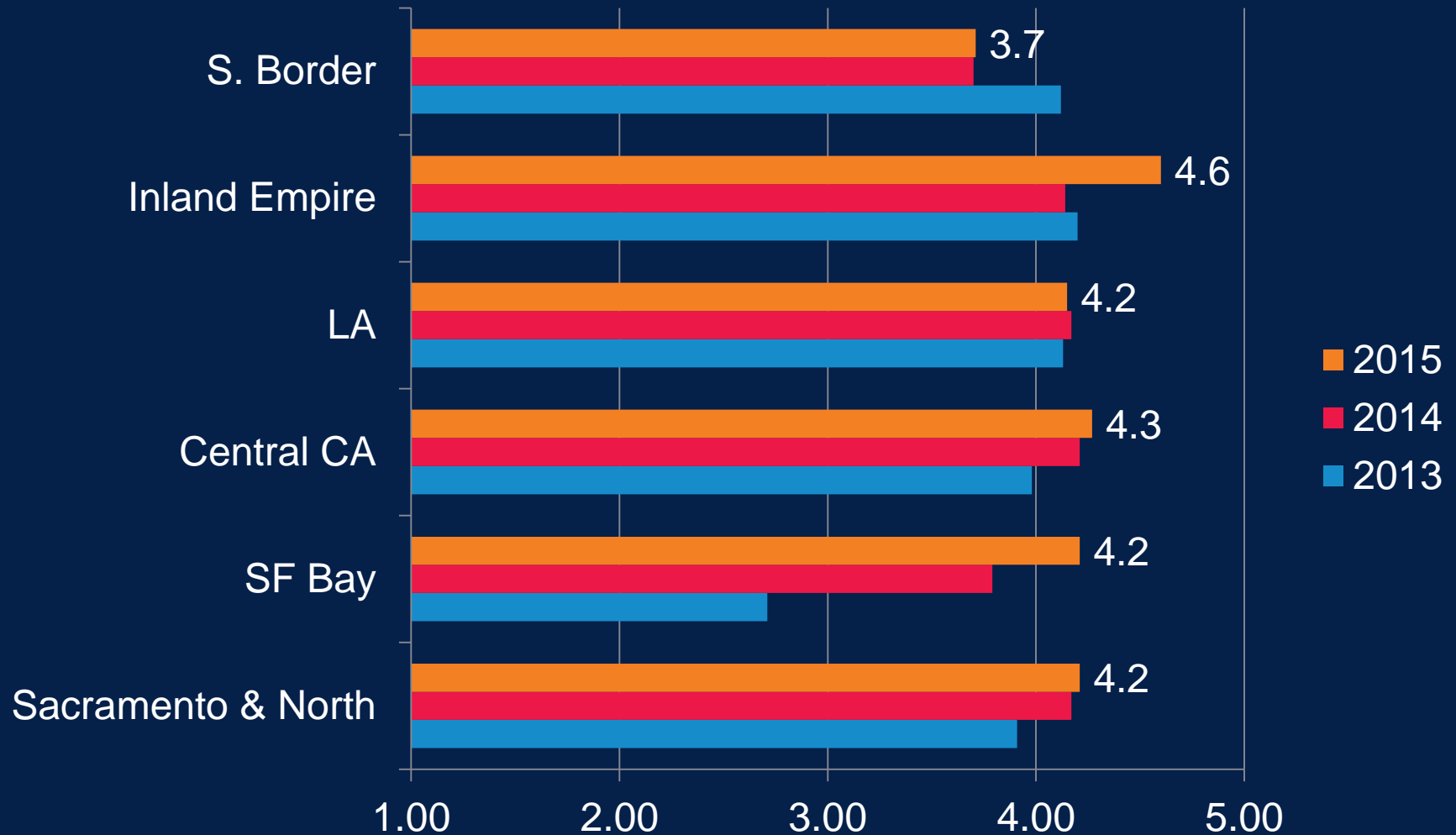


- High demand: difficult to fill open positions
- Moderate demand: some difficulty filling open positions
- Demand is in balance with supply
- Demand is less than supply available
- Demand is much less than supply available

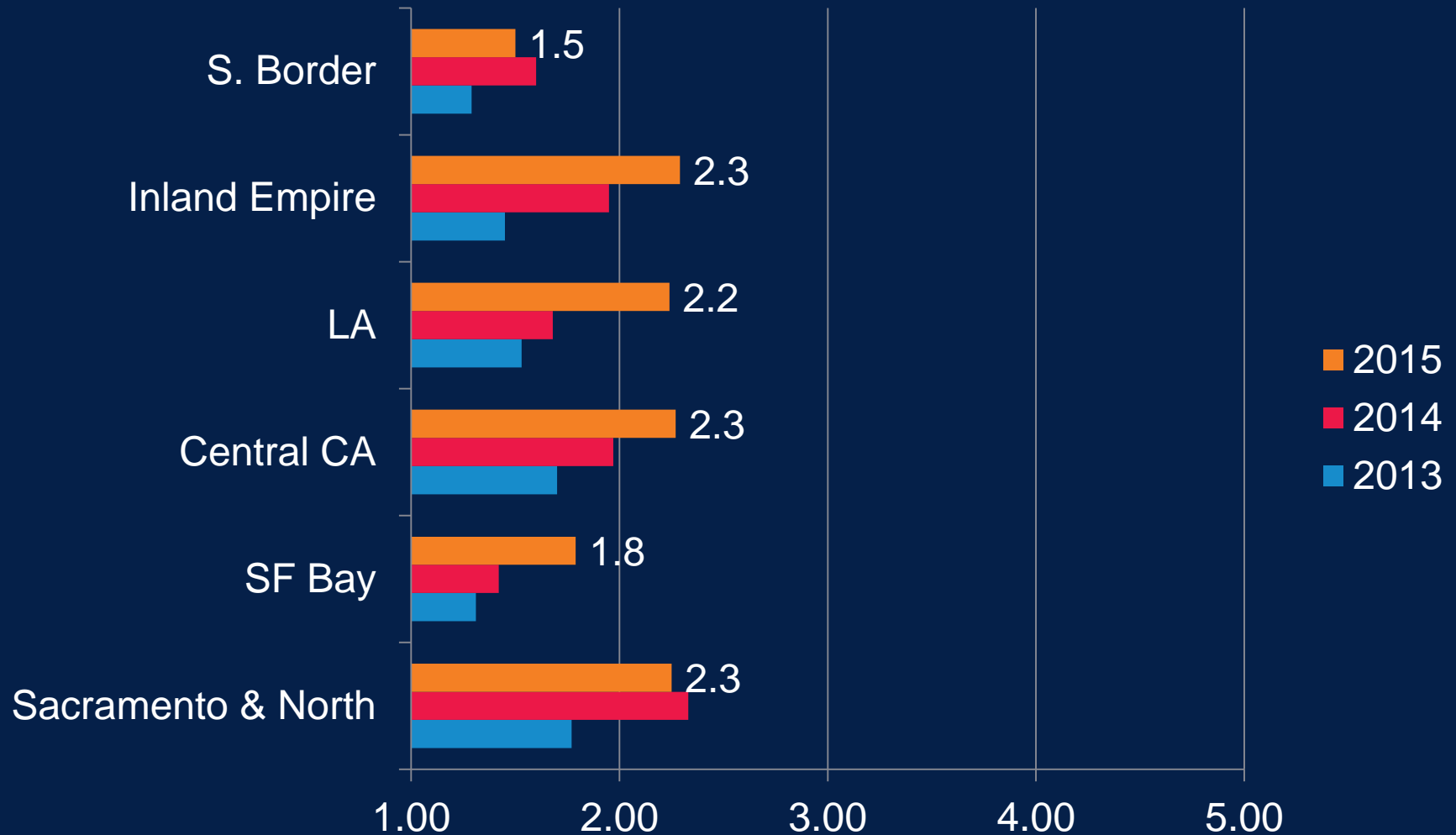
Differences across regions: Overall RN labor market



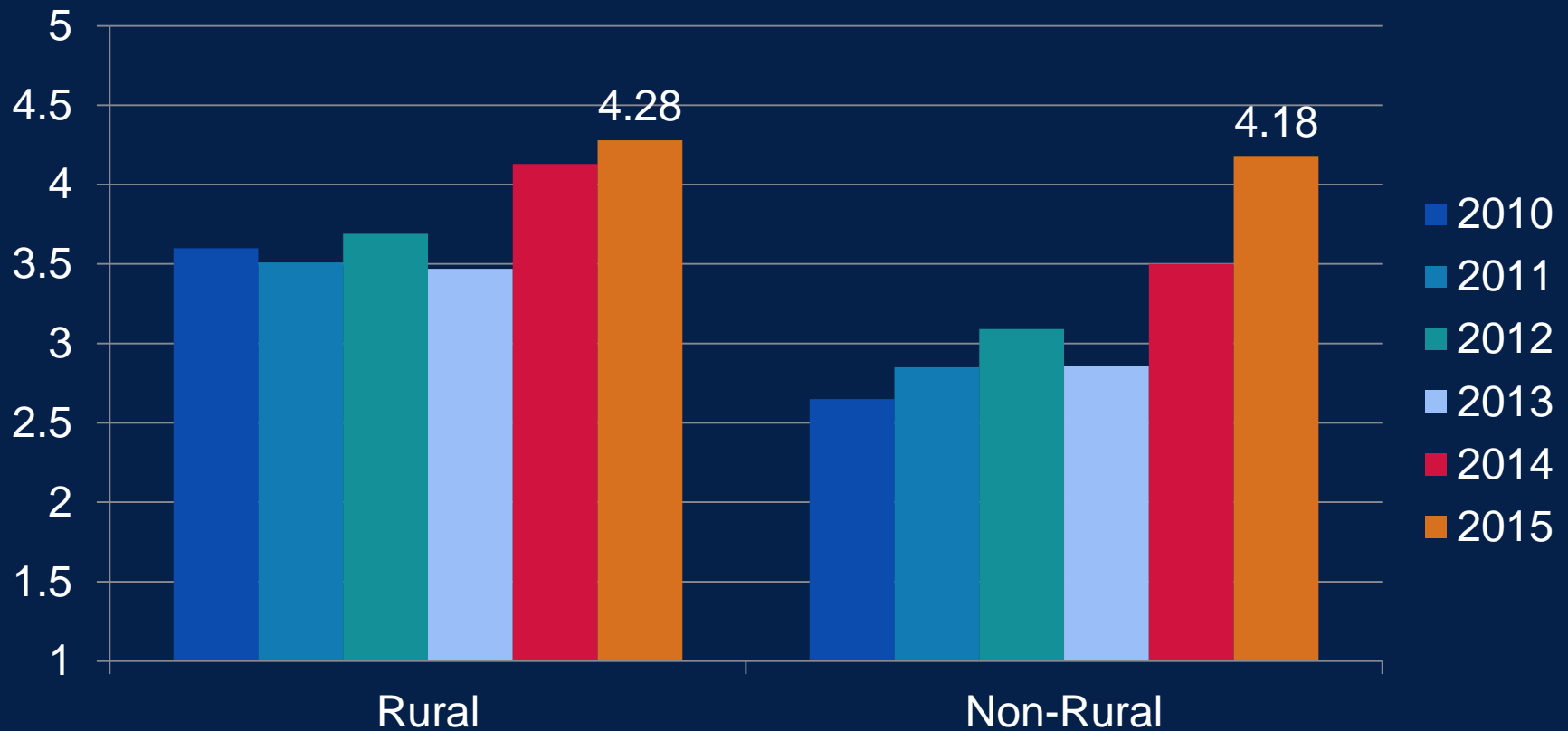
Differences across regions: Experienced RNs



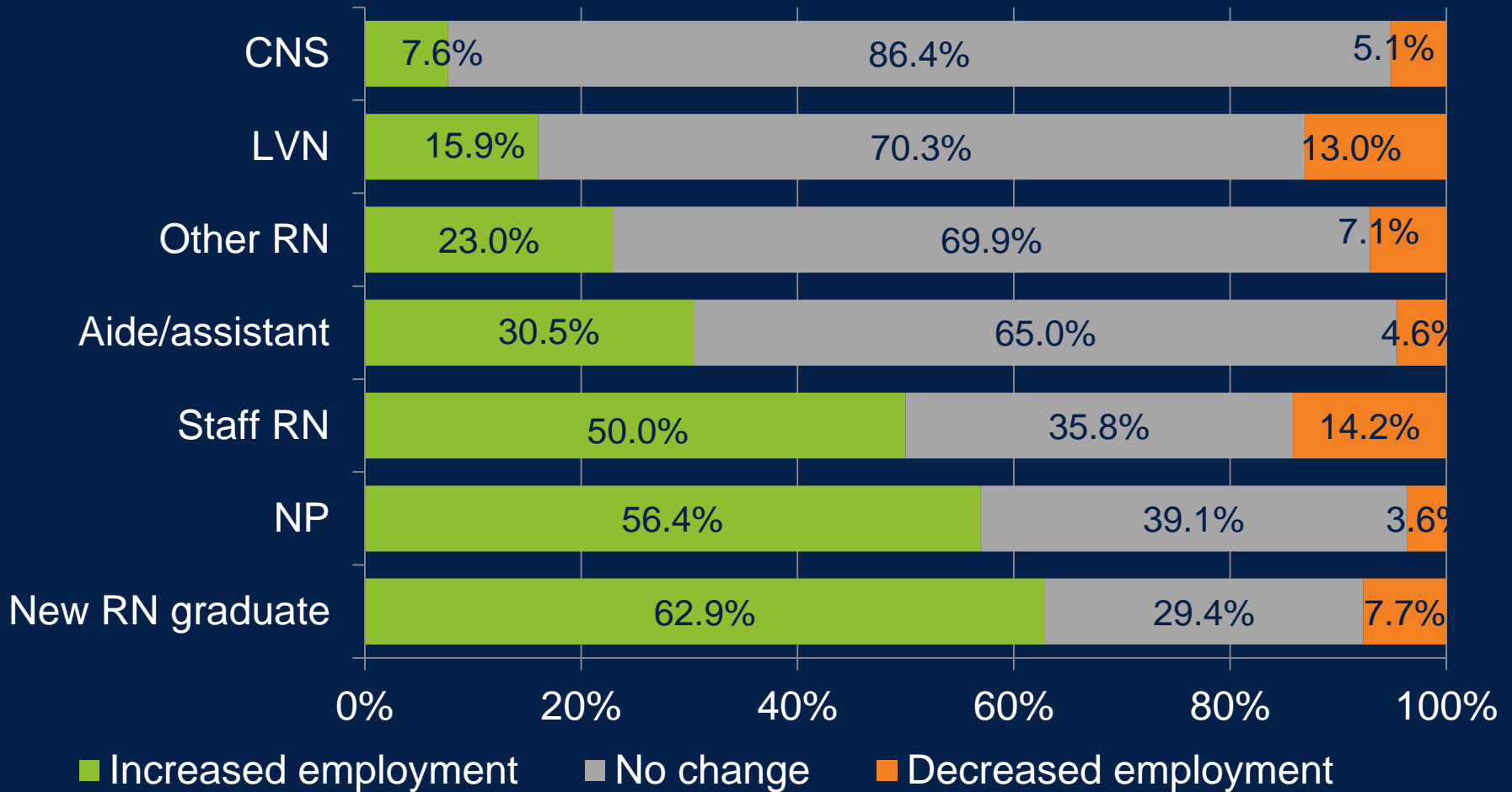
Differences across regions: New Grad RNs



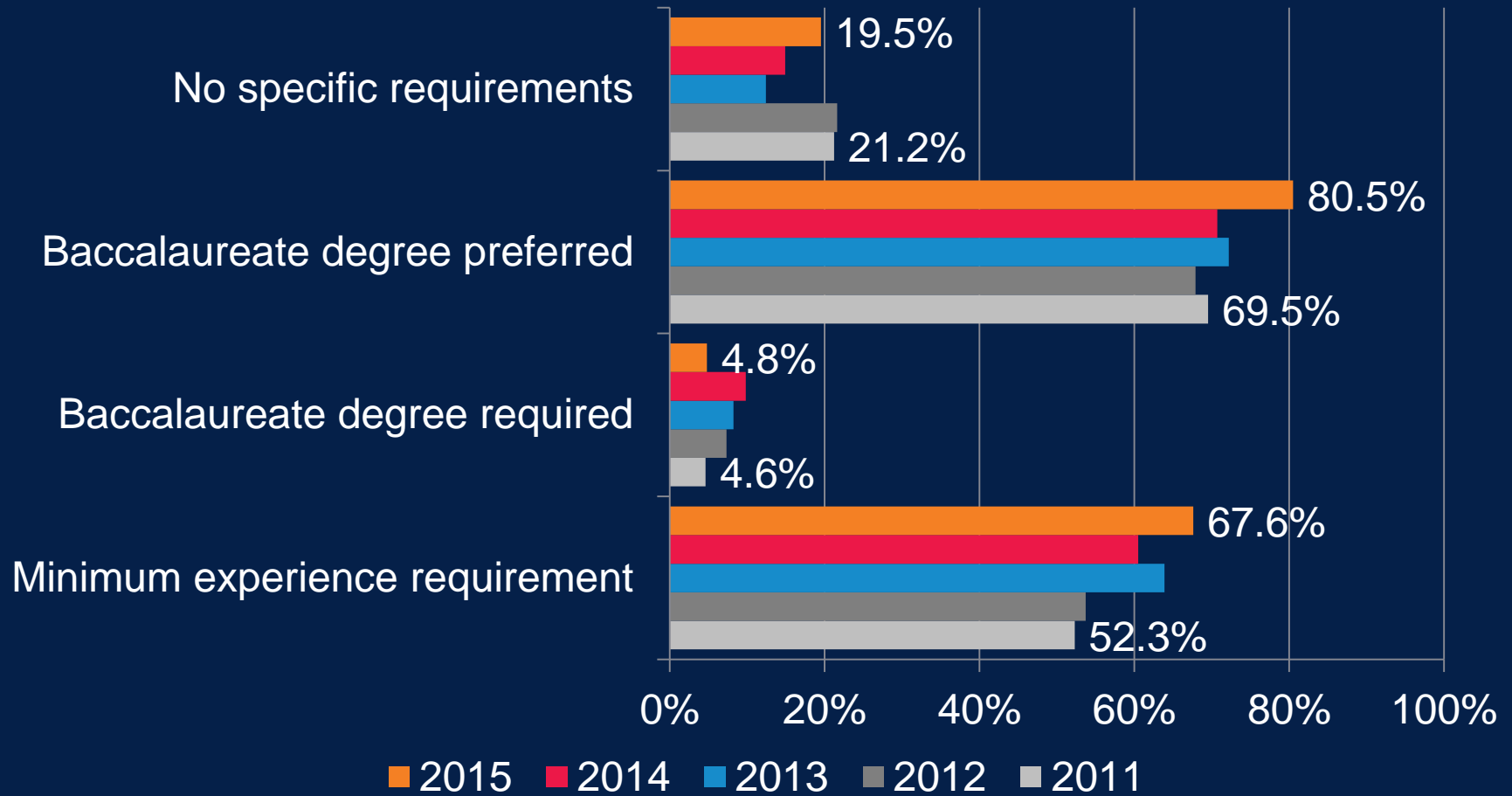
Rural vs. urban perceptions



Change in employment in the past year (2014 - 2015)



Hiring requirements and preferences,



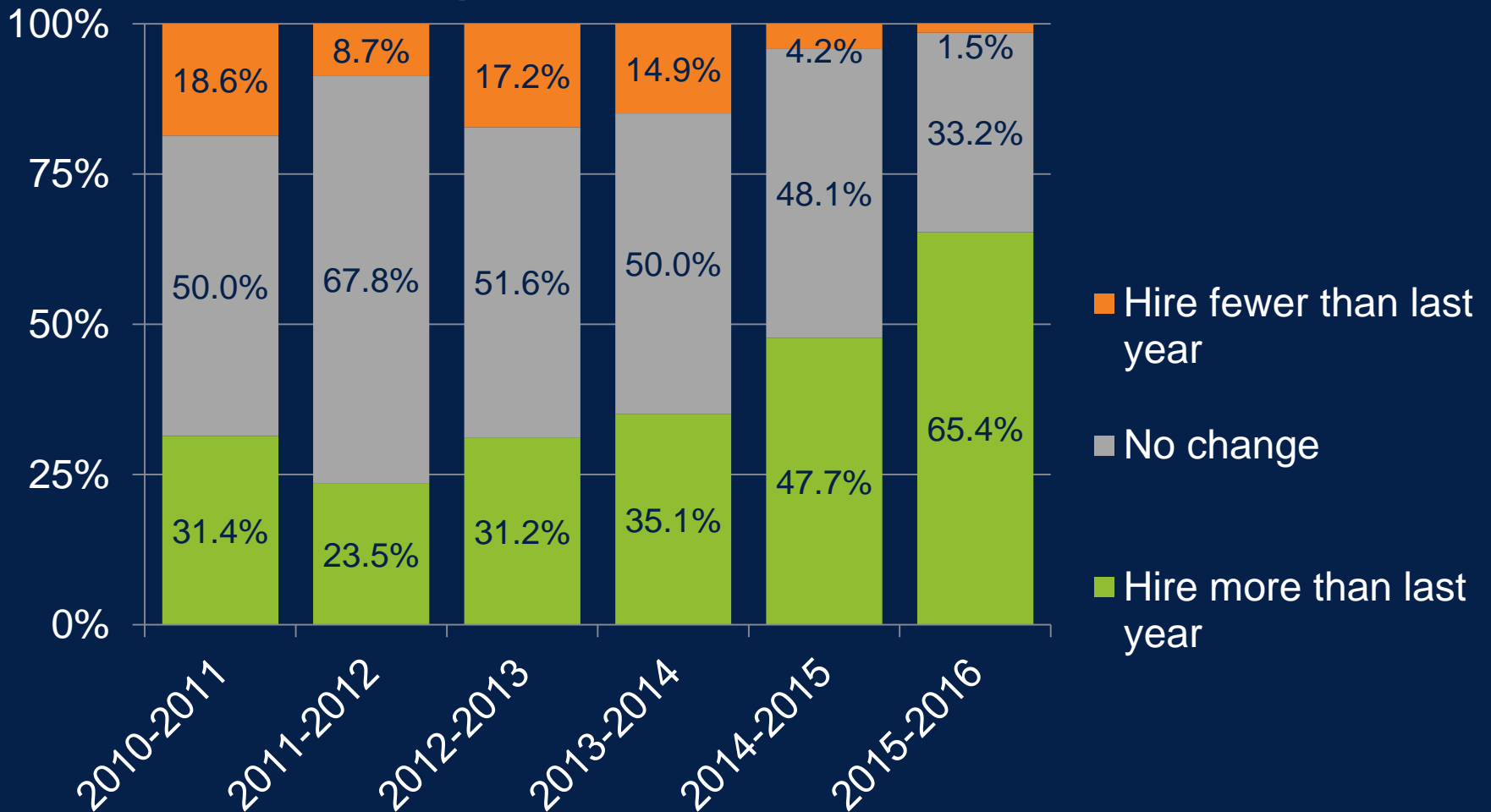
Plans regarding BSN-educated nurses, 2015

- 75% plan to increase the share with BSN
(71% in 2014; 66% in 2013)
- 9% require that hired RNs obtain a BSN within a certain time
(12% in 2014)
- 39% require a BSN for promotion beyond staff nurse
(55% in 2014)
- 32% differentiate RN salary by education degree
(32% in 2014)
- 31% differentiate RN salary by advanced certification
(48% in 2014)

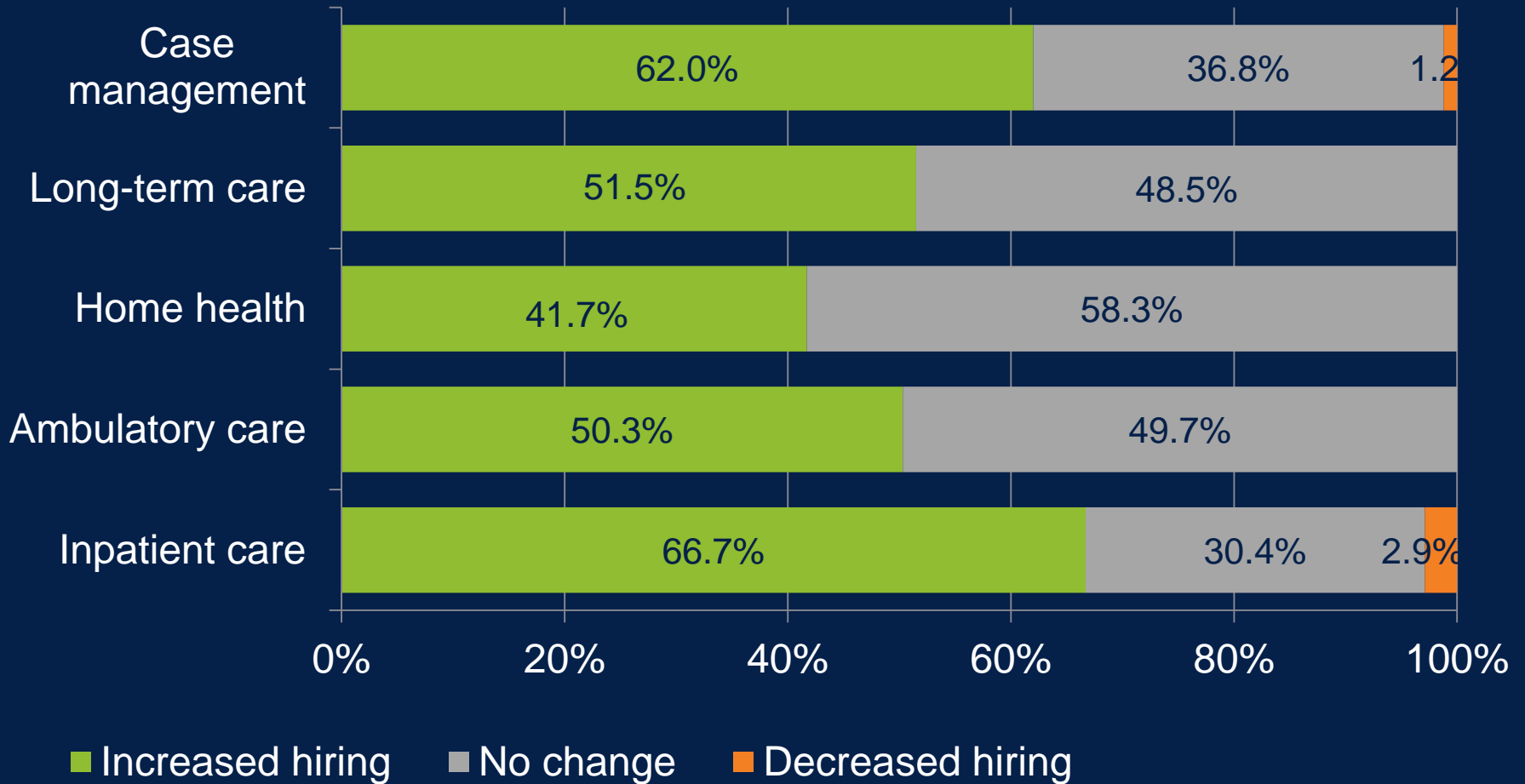
Challenges to increasing the share of BSN-educated RNs

- Most common barriers to increasing share with BSN:
 - Lack of interest among incumbent RNs
 - Lack of tuition reimbursement funds
 - Lack of funds for financial incentives
 - Lack of BSN programs in community
 - Low supply of BSN-educated RNs in community

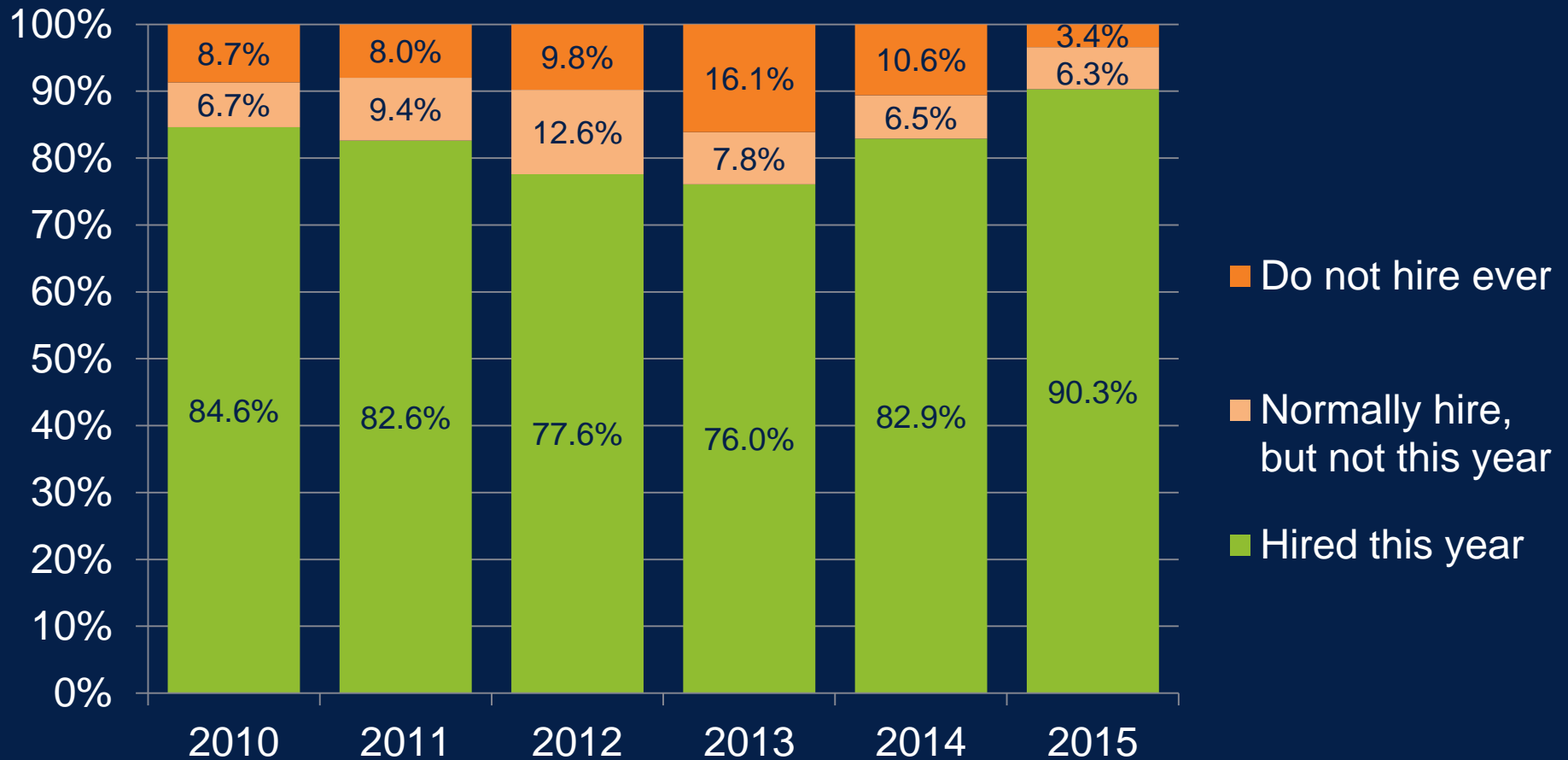
Overall hiring expectations for the next year



Expected RN hiring by care setting for next year (2015 - 2016)

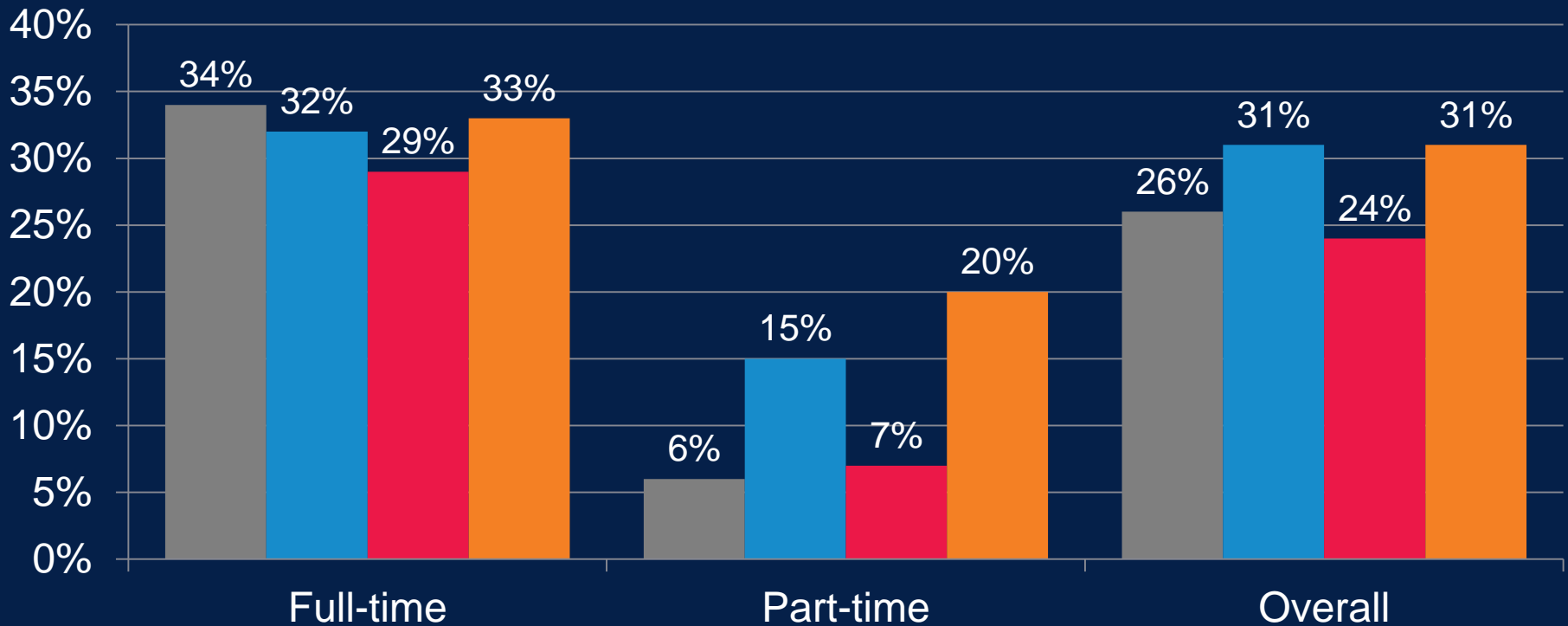


Hiring of newly graduated RNs, 2010-2015

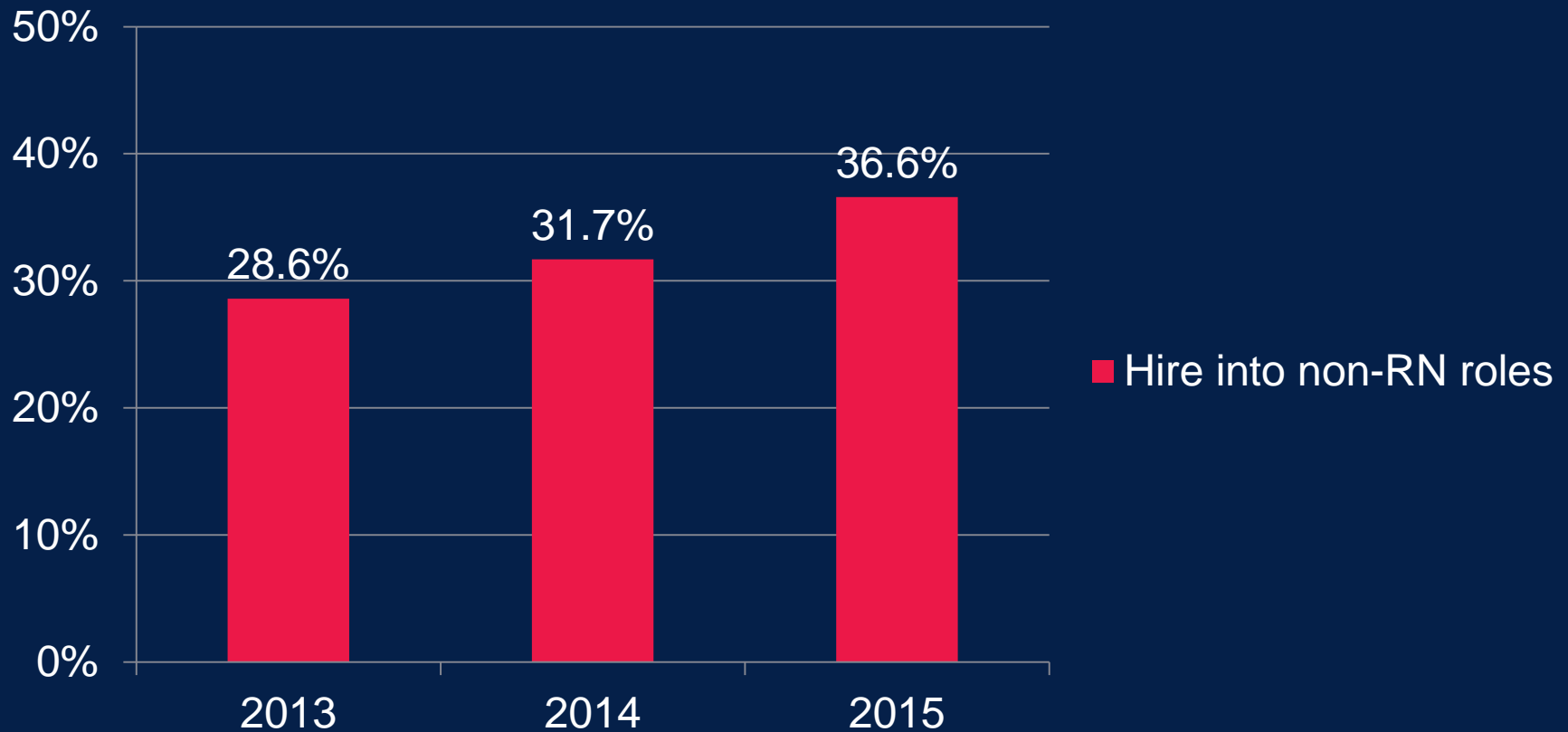


Percent of new hires that were new graduates

■ Fall 2012 ■ Fall 2013 ■ Fall 2014 ■ Fall 2015



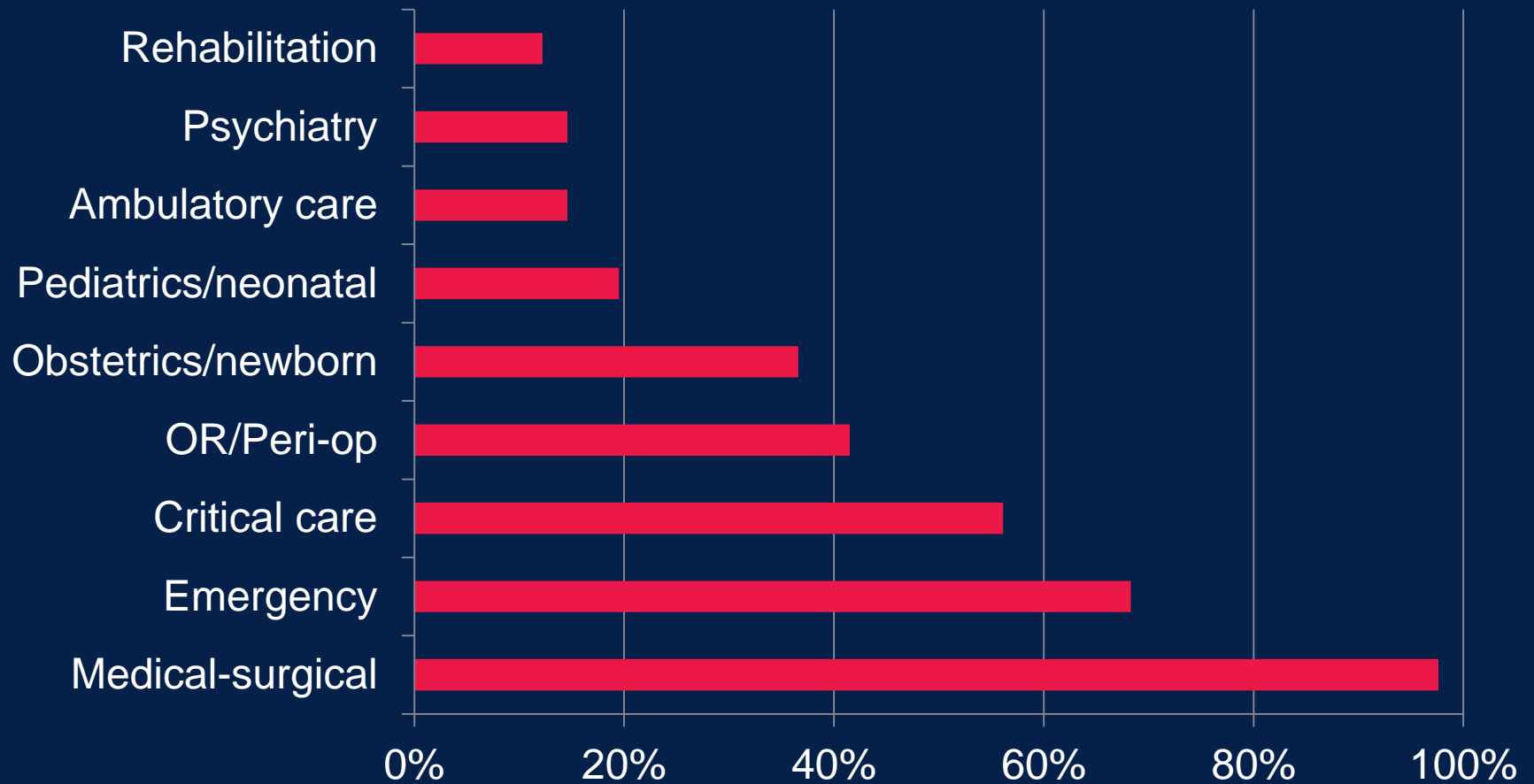
Hiring of new graduates into non-RN roles



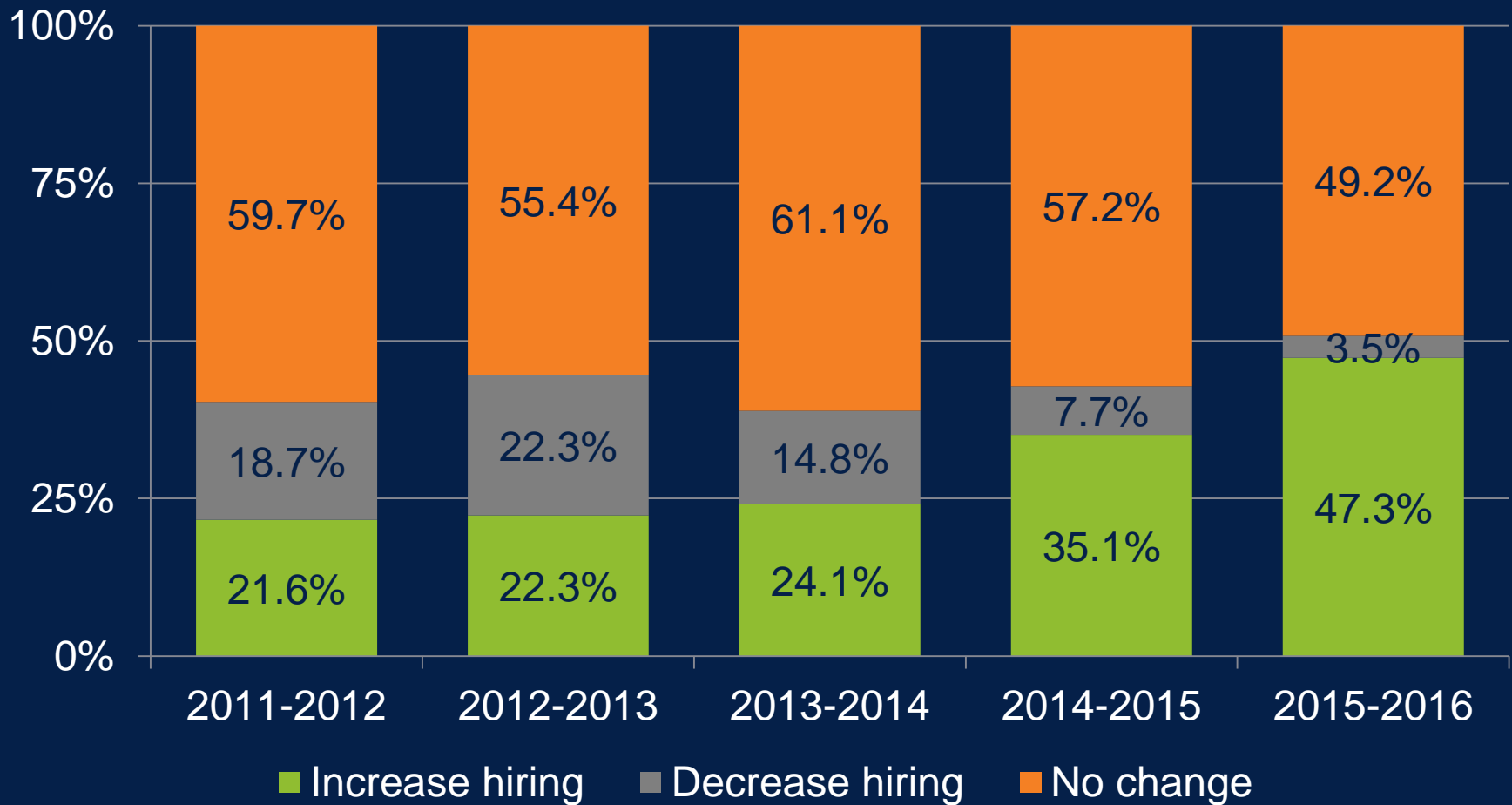
Residency programs for non-employee new graduates, Fall 2015

- 41 hospitals reported residencies for new graduates not guaranteed to be hired
 - Most offered 1-3 times per year
 - Most common capacity is 10-15 new grads
 - Most common length is 12-16 weeks
 - 68% paid program
- 81% of hospitals said 75-100% of residency completers were hired in last year
 - 14% said they hired less than 25%

Residency programs for non-employee new graduates, Fall 2015



Hiring expectations for new graduates



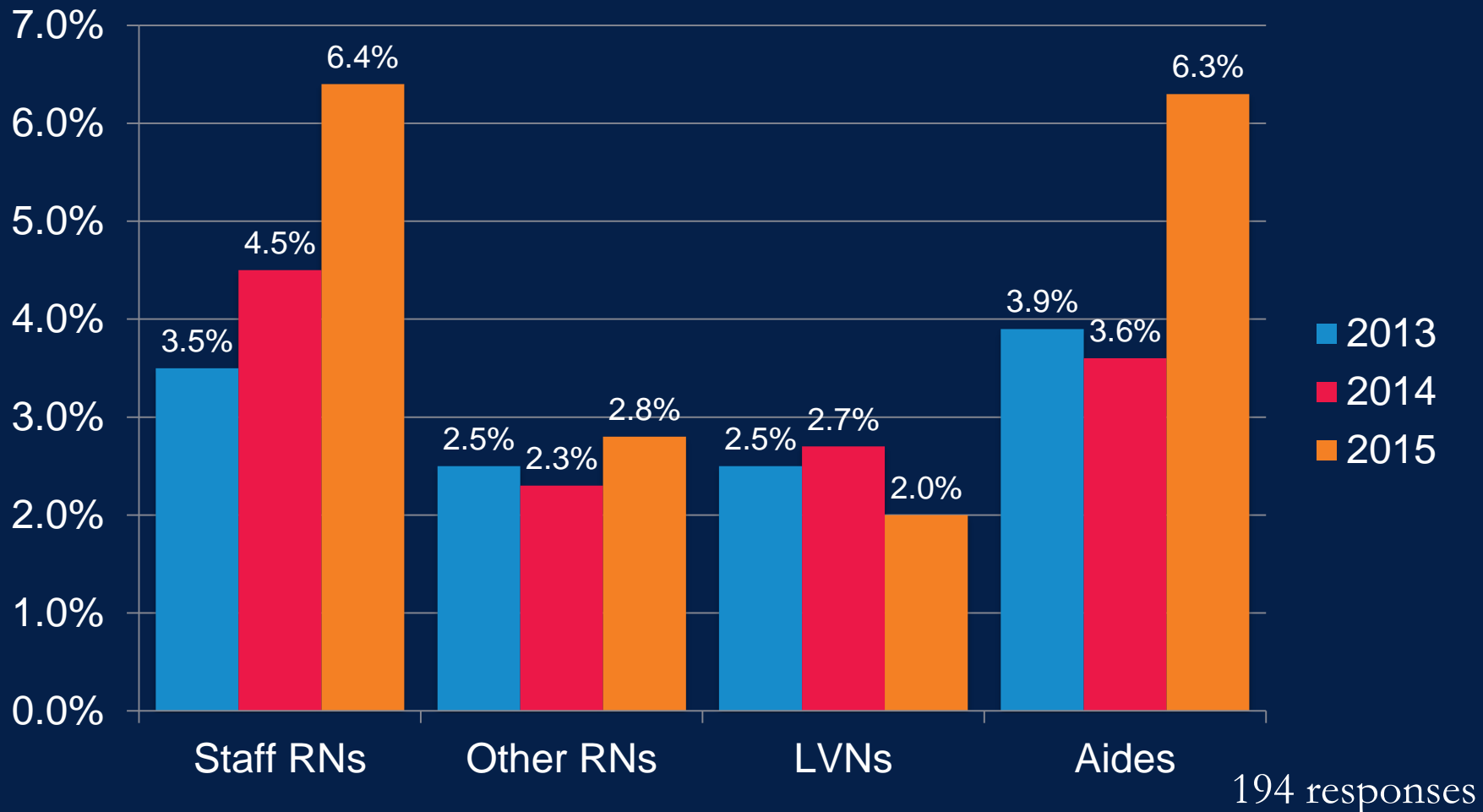
Reasons for expected increase in new graduate hiring

- Lack of available experienced RNs
- Expected retirement of incumbent RNs
- Expansion of service lines
- Desire to build a pipeline to staff own clinical specialties

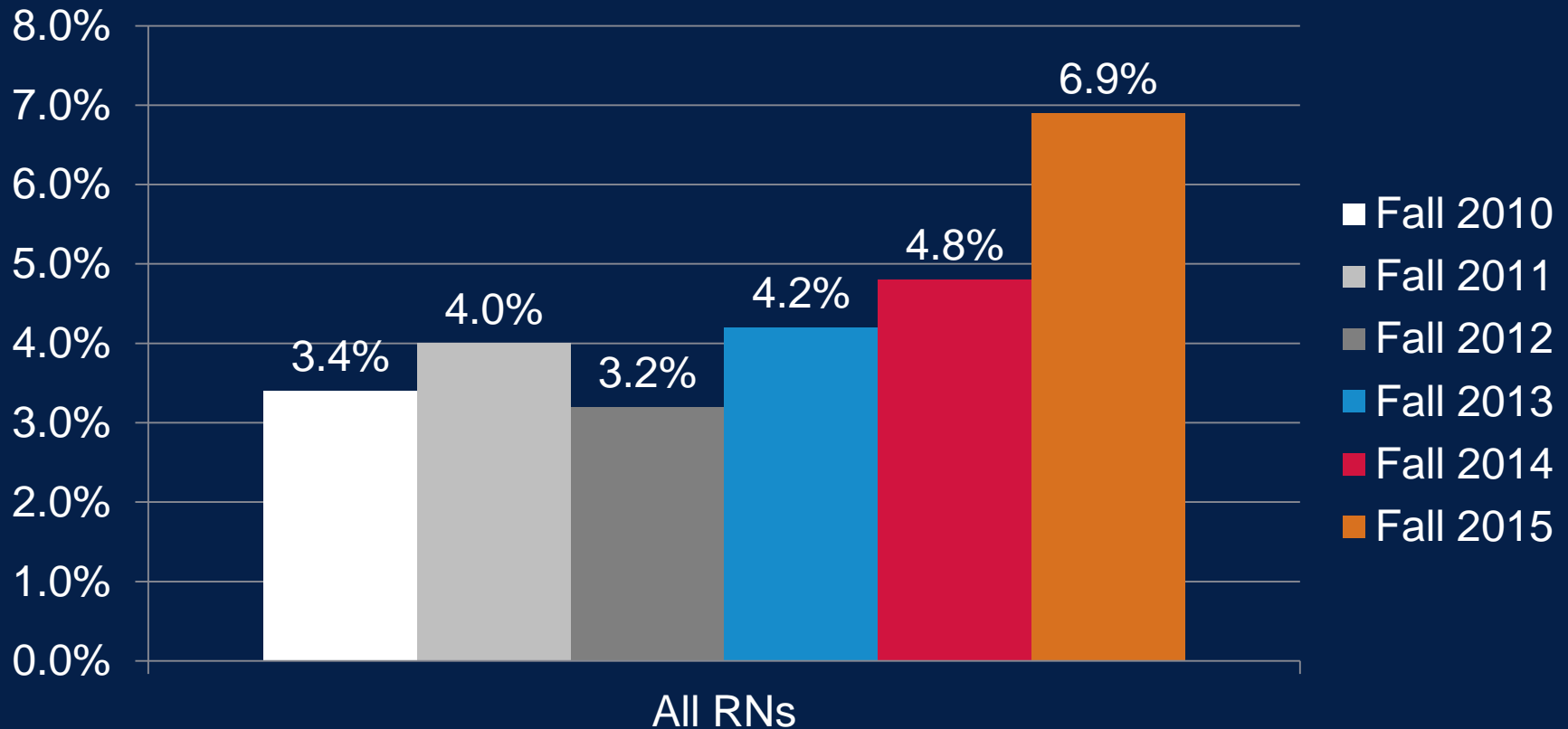
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Quarterly hiring of full-time personnel, HASC Survey, Fall 2013 - Fall 2015

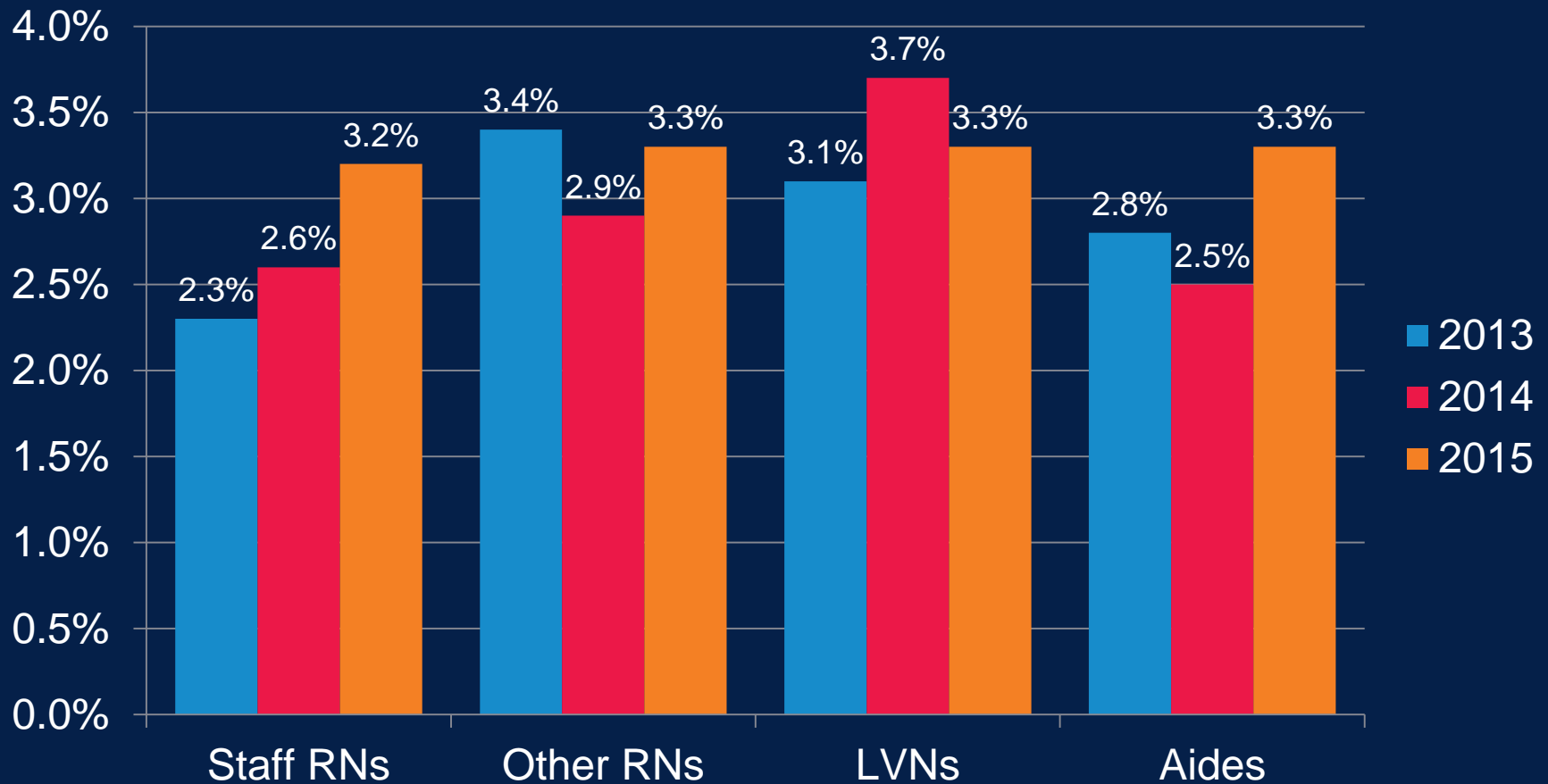


RN Vacancies, HASC Survey, 2010 - 2015



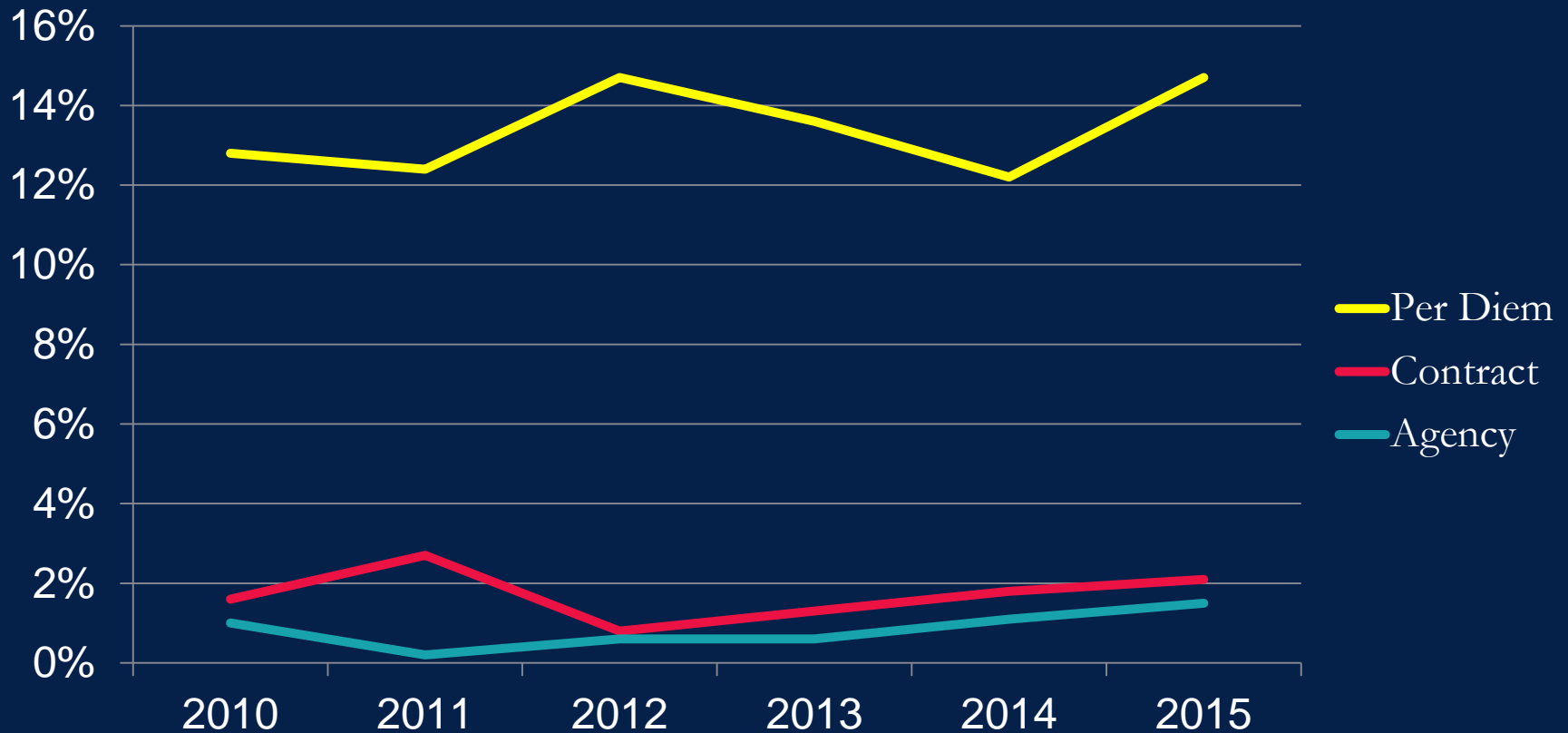
194 responses

Quarterly turnover of full-time personnel, HASC Survey, Fall 2013 - Fall 2015



194 responses

Per Diem, Contract, and Agency RN Staff as Percent of Current Staff



194 responses

Goals for this webinar

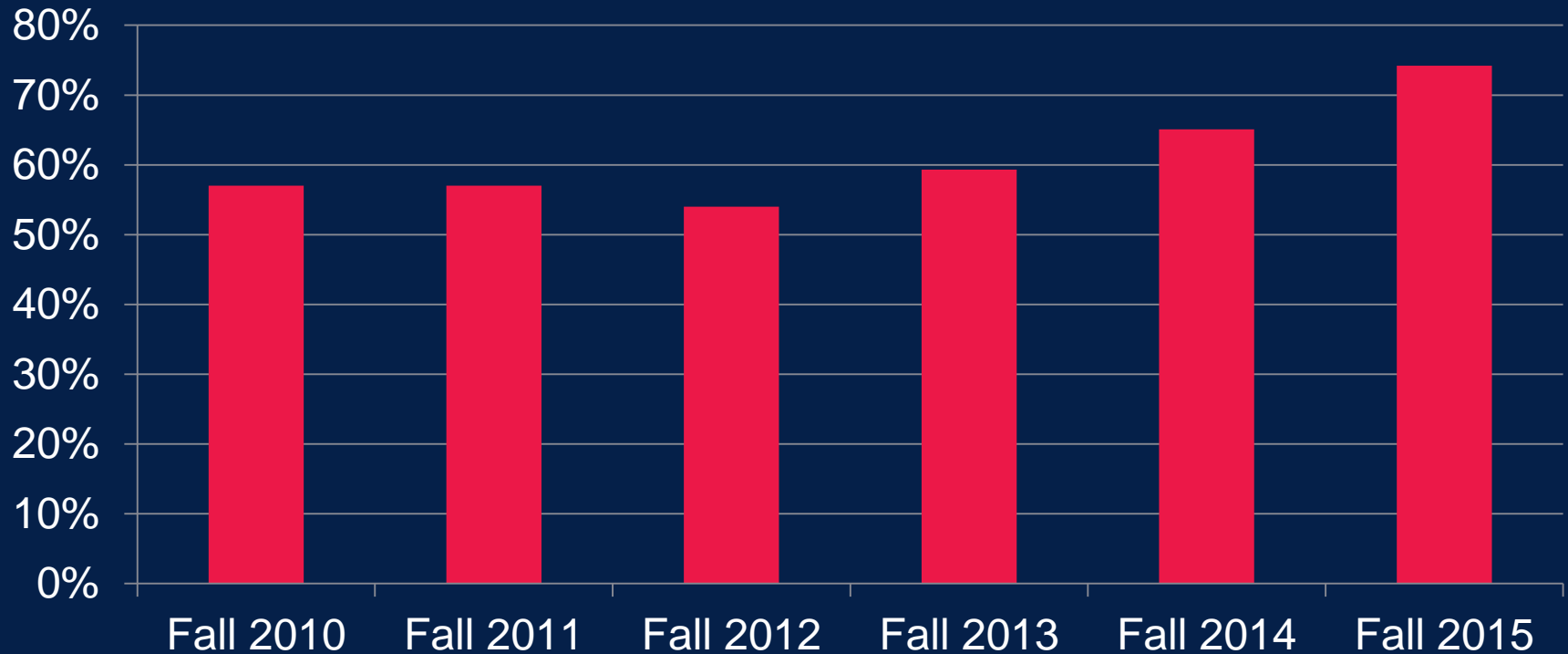
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New RN Graduate Hiring Survey

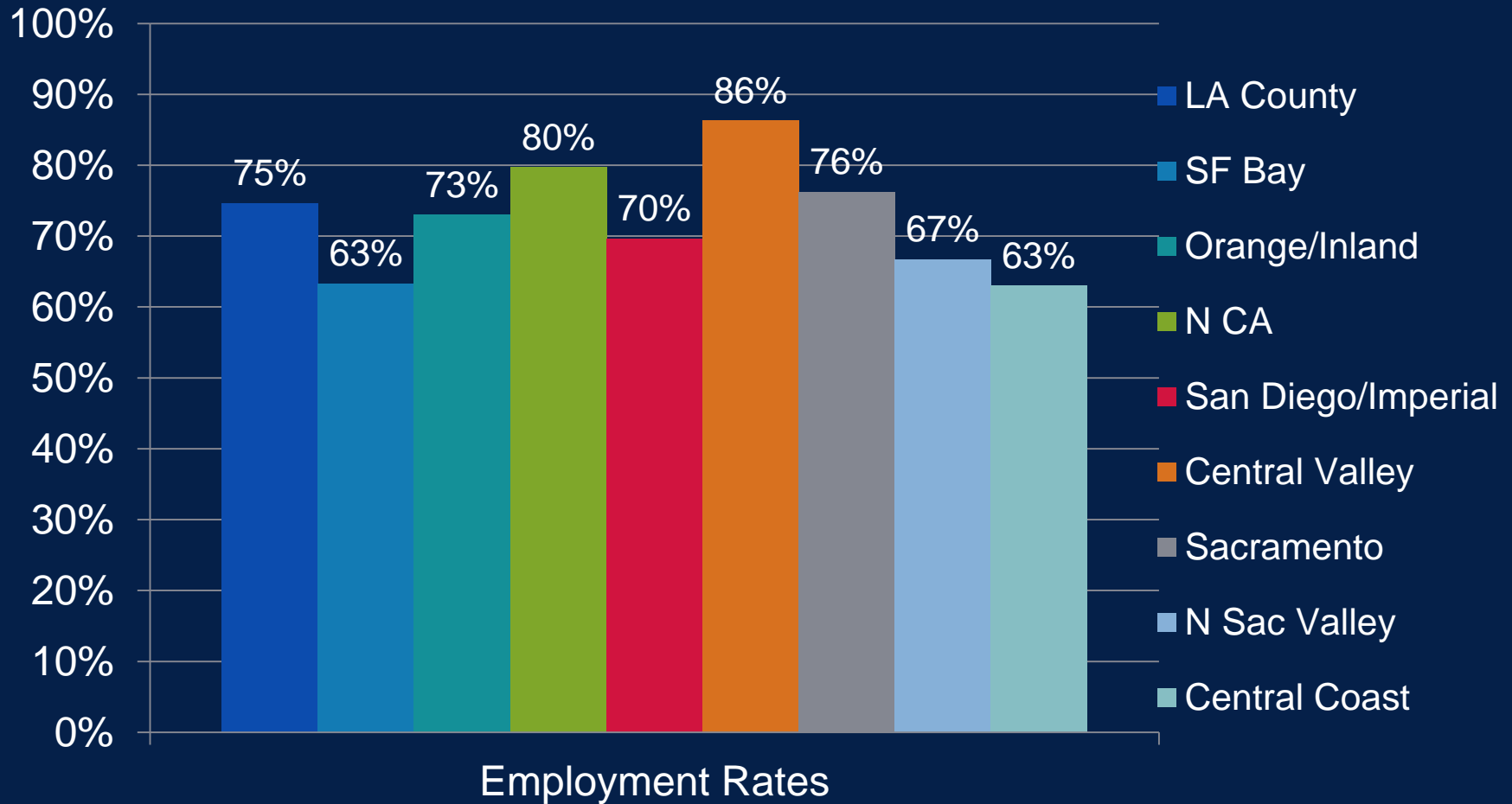
- Statewide survey of new grads conducted in fall of 2015
- Collaborators:
 - HealthImpact
 - California Board of Registered Nursing
 - Association of California Nurse Leaders
 - California Student Nurses Association
- 50% random sample of new graduates from Sept 2014-Aug 2015
 - 12% response rate in 2015
- Funder: Kaiser Permanente Northern California Patient Care Services and Kaiser Permanente Nurse Scholar Academy

Findings from the 2015 New RN Graduate Hiring Survey

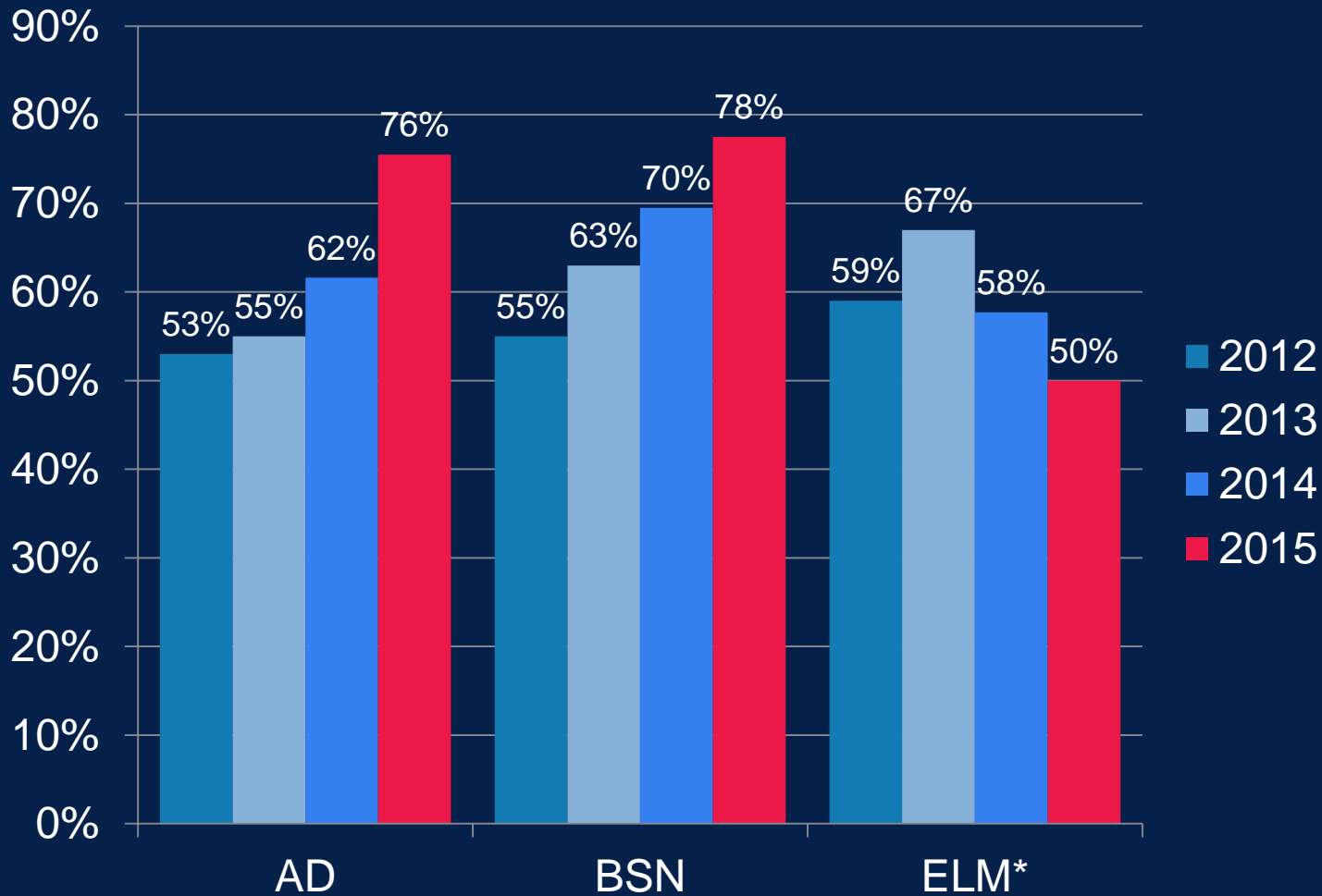
Percent of new graduates employed in nursing



Regional variation in employment

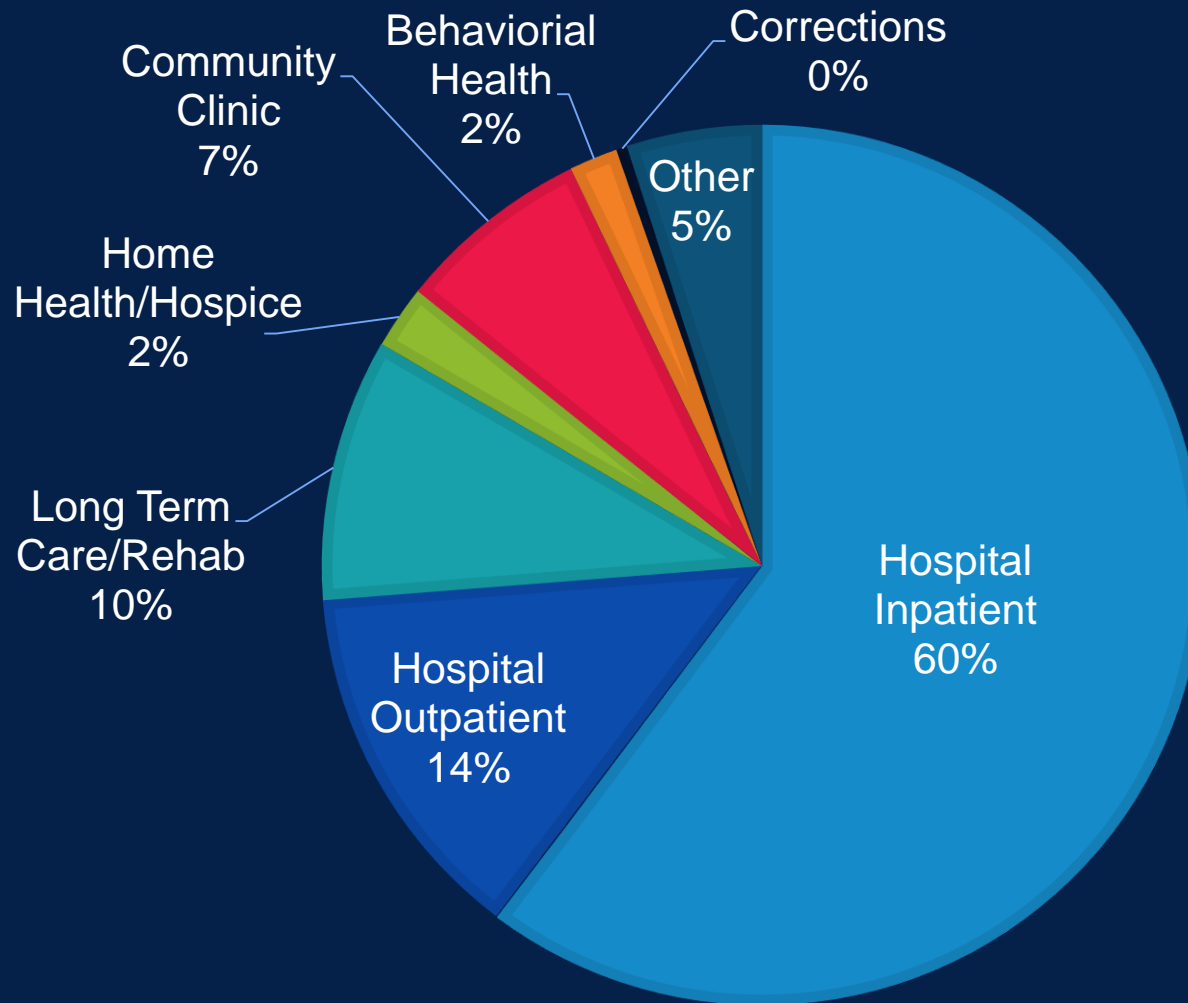


Employment rate varies by education



*Small ELM response rate in the 2015 New RN Graduate Hiring Survey

Employment settings of new graduates



Why are they not employed?

- No experience – 85%
- No position available – 37%
- BSN preferred or required – 30%
- Work experience not applicable – 26%
- Weak resume – 12%

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Background

- HASC serves the political, economic and educational needs of hospitals in in Los Angeles, Orange, Riverside, San Bernardino, Santa Barbara and Ventura counties
- 175 member hospitals and health systems
- Concerns raised regarding apparent shortage of specialty trained RNs
- Engaged HealthImpact to conduct root-cause analysis
- In January 2016, HASC convened a workgroup: HR, Nursing and Administrators

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Why is it hard to find experienced RNs for specialty positions?

What can be done about it?

HealthImpact Engaged to Assist: Southern California Hospitals Seeking a Solution

At request of Hospital Association of Southern California to serve its members

Workgroup of Hospital Leaders: HR, Nursing and Administrators Define Success:

- Collaboration across systems instead of competition
- Relationship building and strengthening existing connections
- Partnering with nursing schools
- Sustainable, long-term strategy
- Shared belief that newly licensed RNs DO need a formal transition to practice program

Process to Address Shortage

Series of meetings to build relationships

Survey instruments and scoring rubric

Article research and evidence to support work

Identify root causes

Validate

Develop recommendations



Progress to Date: Specialty Focus Areas

Extrapolated need across region for experienced RNs over 12 mo*:

Peri-operative— 1,072

Critical Care – 2,320

Emergency – 1,392

Labor & Delivery – 864

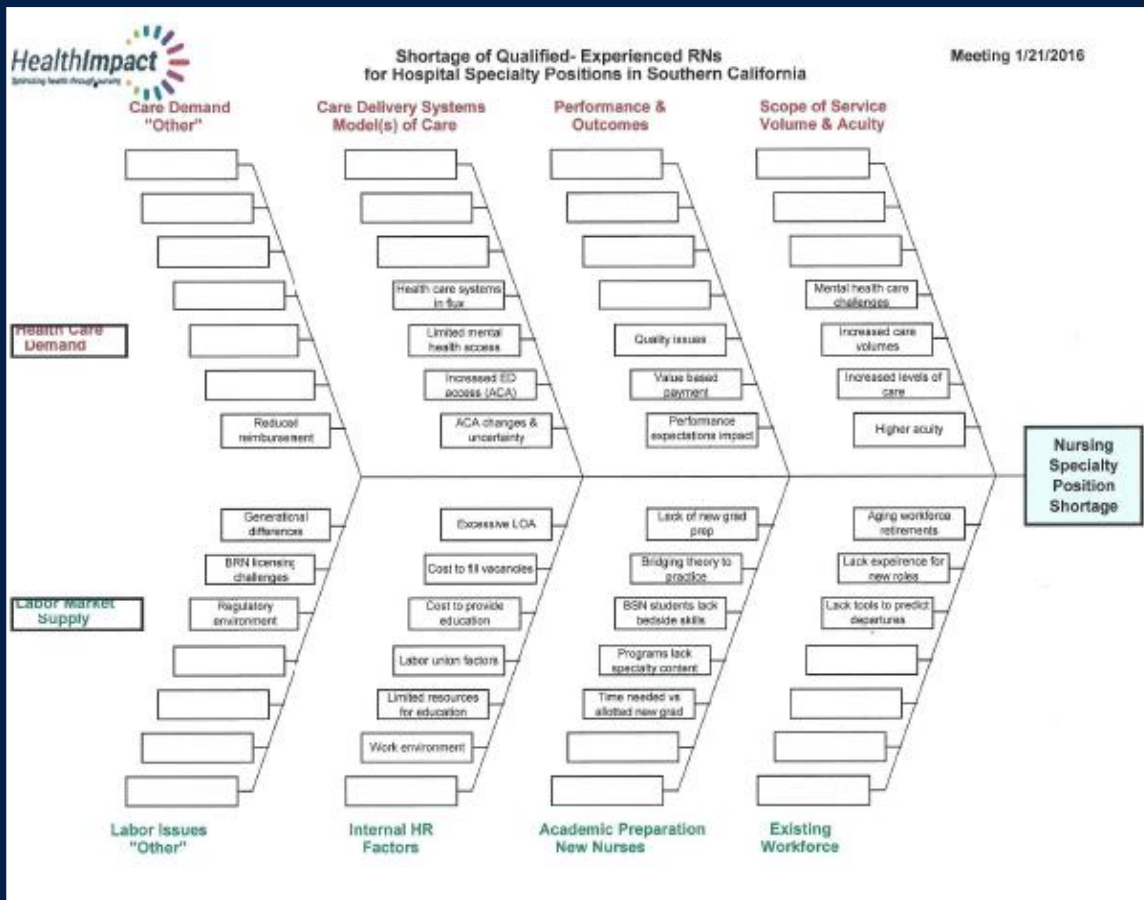
Neonatal ICU – 688

Care Coordinator and Case Manager –
anticipated to grow



* 17 hospitals in workgroup representing 164 hospitals across HASC total membership

Root Causes Identified by Supply and Demand



1. Education insufficient for specialty role preparation, especially related to increasing acuity, complexity of care, quality and safety requirements.

2. Loss of experienced level specialty RN workforce.

3. Resource challenges, including cost of recruitment and hiring bonuses.

4. Intensity of specialty work environment, resulting in burnout.

Which Strategies Make Sense Individually? For the Region?

SCORING WORKSHEET

For each category, score 1-4, with 4 being the best or most ideal

	School-Employer Transition to Practice for New Graduate RNs	School-Employer Transition in Practice for Experienced RNs moving to new roles	Elective Course / Externship for Junior and Senior RN students	Dedicated Education Units for New Hire RNs	Dedicated Education Units for RN students	Academic-Practice Relationship-Building	Strategy:	Strategy:
Overall ability to address shortage								
Cost to implement								
Time to implement								
Impact on internal staff / resources								
Benefit across various specialty areas								
Sustainability								
Other								
Other								
TOTAL								

Emerging Strategies

Pre-licensure: Specialty Immersion

Junior and Senior Year Elective

- ✓ Rigorous selection process
- ✓ Informed by regional demand for specific specialties
- ✓ Provided by school of nursing w/clinical site shared faculty
- ✓ Strengthen connection of students to potential employment post-graduation



Emerging Strategies

New Graduate and Existing RN Transition Program

Model developed through HealthImpact

- ✓ Schools/clinical sites partner
- ✓ Regional approach with option for multiple partners
- ✓ Schools provide didactic content, course credit, liability coverage
- ✓ Clinical sites provide preceptors
- ✓ Possibility of benefit to combining preparation of new grads with experienced RNs moving to new roles
- ✓ Faculty with right skill set essential



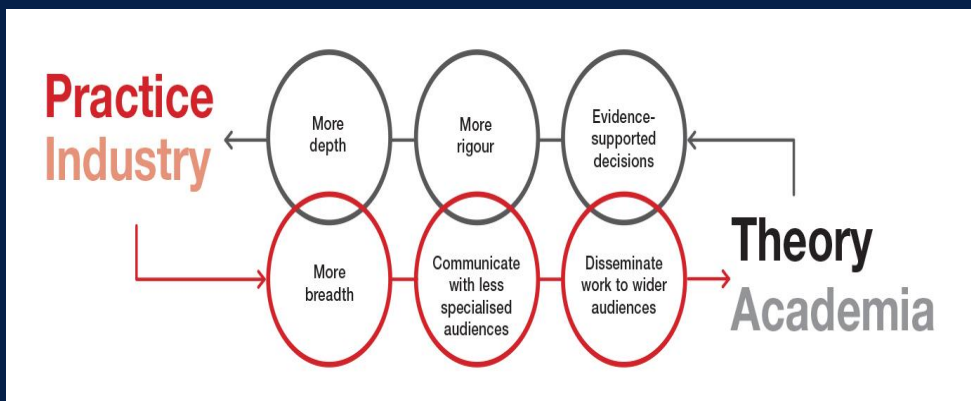
Emerging Strategies

Case Management/Care Coordination Course for Experienced RNs

- ✓ Regionally based
- ✓ Draw experienced RN participants from multiple hospitals
- ✓ Intensive course, held at convenient time for working RNs
- ✓ Share various aspects of case management/care coordination
- ✓ Possible blended format, faculty team



Multiple Answers



Stronger Academic/Practice Ties

- ✓ Joint appointments/shared positions in practice/academia
- ✓ Appointments to committees, task forces and project focused teams

The Future



Moving Forward

Collaborative approach

Building a sustainable solution

Expanding capacity

Strengthening academic/
practice partnerships

Focusing on regional needs

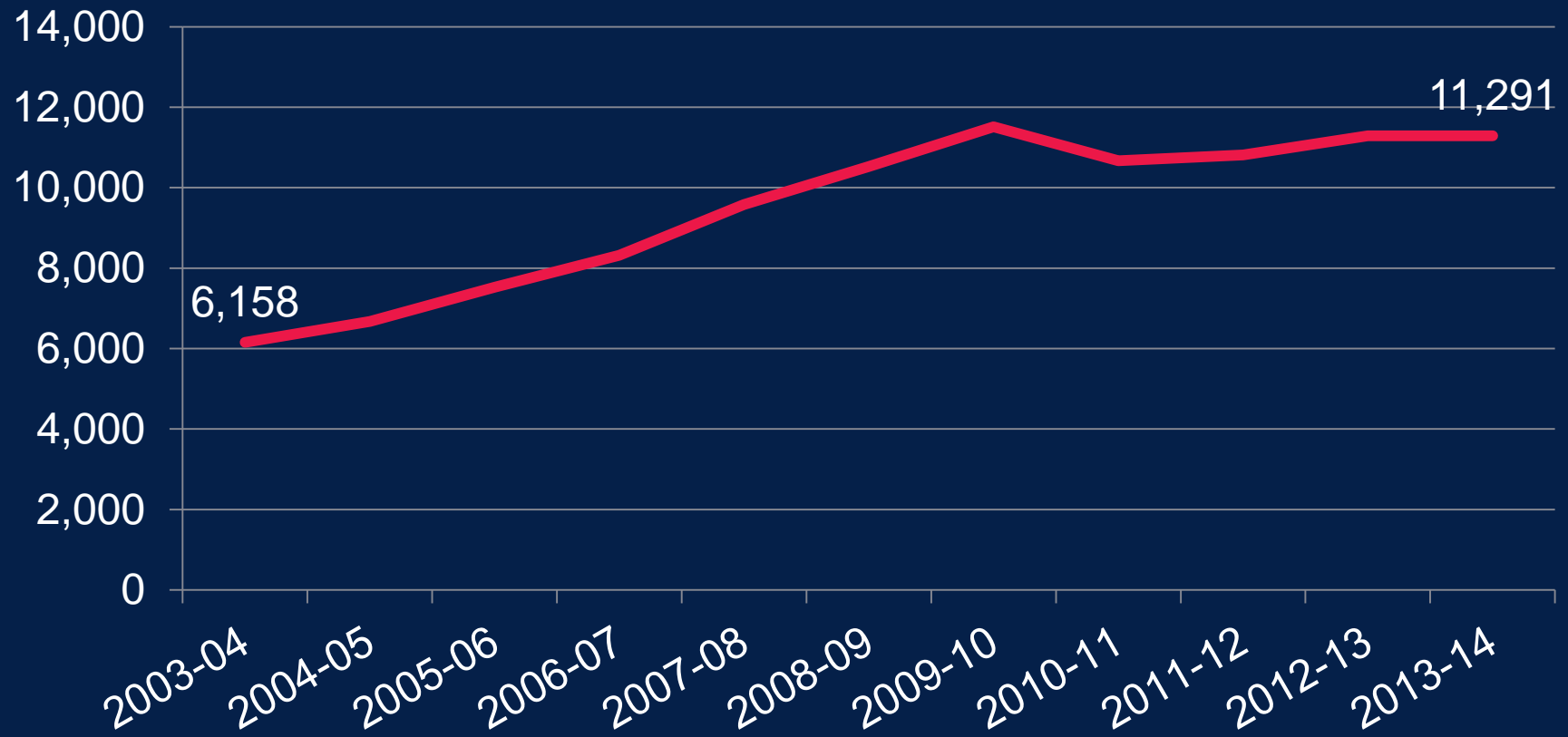
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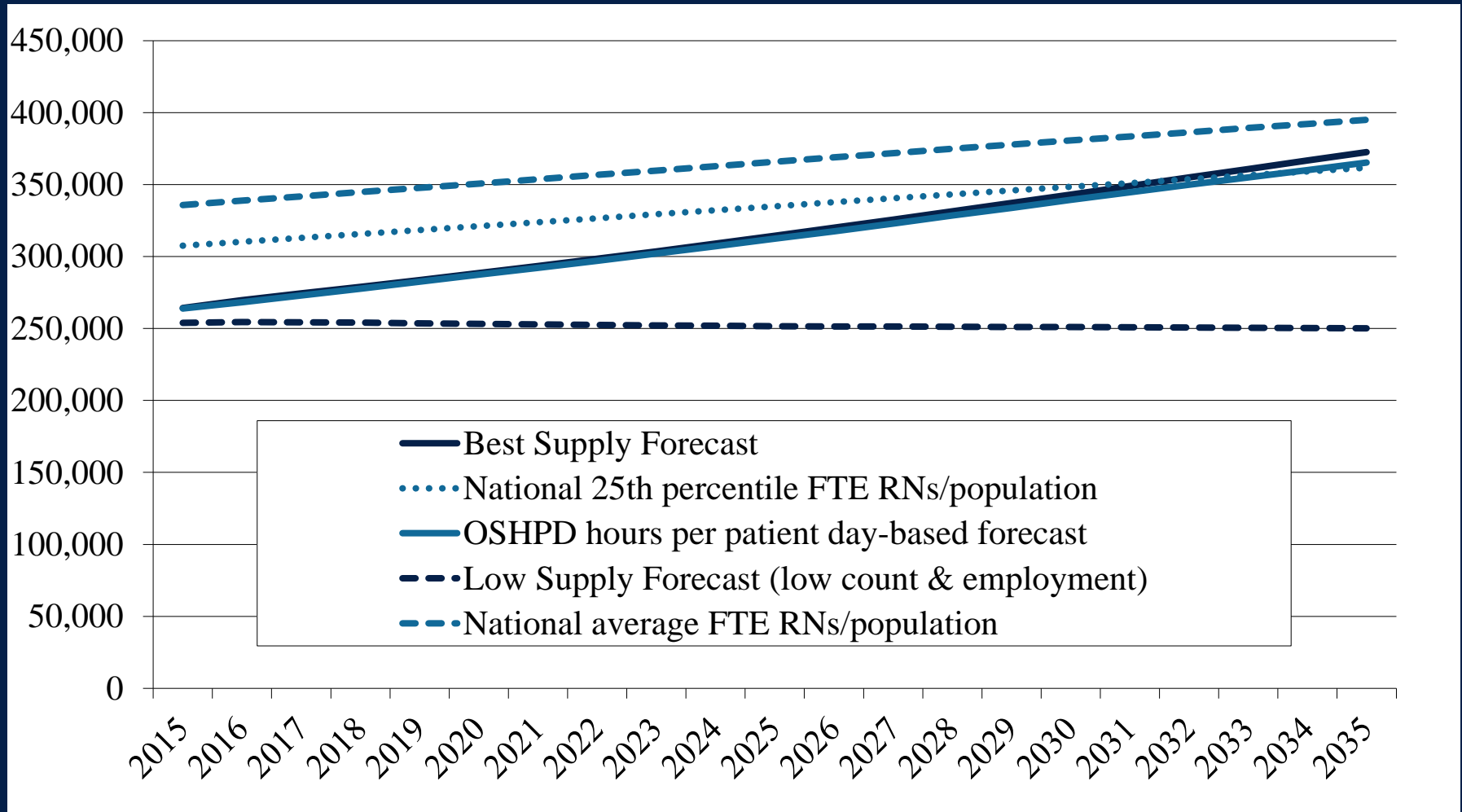
What is happening now?

- There is current and anticipated job growth
 - Inpatient care growth in census and higher acuity
 - Ambulatory care growth
- Shortage of experienced RNs
 - Operating Room
 - Labor & Delivery
 - Emergency Department
 - Intensive care
- Employers are avoiding new graduates

California RN graduations per year



Best supply and demand forecasts for RNs, 2015-2035



Concerns for workforce policy

- Will recent graduates who can't find work leave California permanently?
- What education changes are needed to ensure new graduates have the right skills?
- Can we foster opportunities to gain on-the-job skills and to pursue additional education?

Solutions

- Employers: Invest in new graduate hiring
 - Less expensive than a shortage
 - Recruitment costs
 - Costs of patient care lapses
 - Costs of rapid wage increases
- Specific investments:
 - Continuing Education
 - Mentoring
 - Creative Hiring Practices
 - Volunteering
 - Transition to Practice Programs

Participation in Transition to Practice Programs

- Employer Provided Participation – 42.7%
- School of Nursing Provided Participation – 2.8
- 45.5% of New Graduates Participated in a Transition to Practice Program

Solutions

- Educators: Partner with employers
 - Offer electives in the clinical areas of shortage
 - Ensure streamlined education progression
- Policymakers: Maintain education capacity
 - Do not let enrollments drop
 - Support scholarship programs such as the HPEF programs

Check out the UCSF website!

<http://rnworkforce.ucsf.edu>

RN Workforce: California's RN Labor Market

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Welcome to RN Workforce: California's RN Labor Market

News

- [Webinar Invitation: Emerging trends in CA's RN labor market - UCSF/HASC/HealthImpact](#)

Post date: April 8, 2016

WEBINAR INVITATION:

Emerging Trends in California's RN Labor Market

Date: Tuesday, April 19, 2016

Time: 9:00AM-10:00AM PST

Register now!

<https://attendee.gotowebinar.com/register/6103790741262231042>

Since 2008, there have been reports that newly-graduated California RNs cannot find work, and thus many are leaving the state for greener pastures. What is happening now? Will health care providers be able to hire all the RNs needed now and in the long term?

Join us for a webinar to discuss these questions and... [Read more](#)

- [Save the Date! Upcoming webinar on trends in CA's RN labor market - UCSF/HASC/HealthImpact](#)

Post date: March 24, 2016

Our Mission

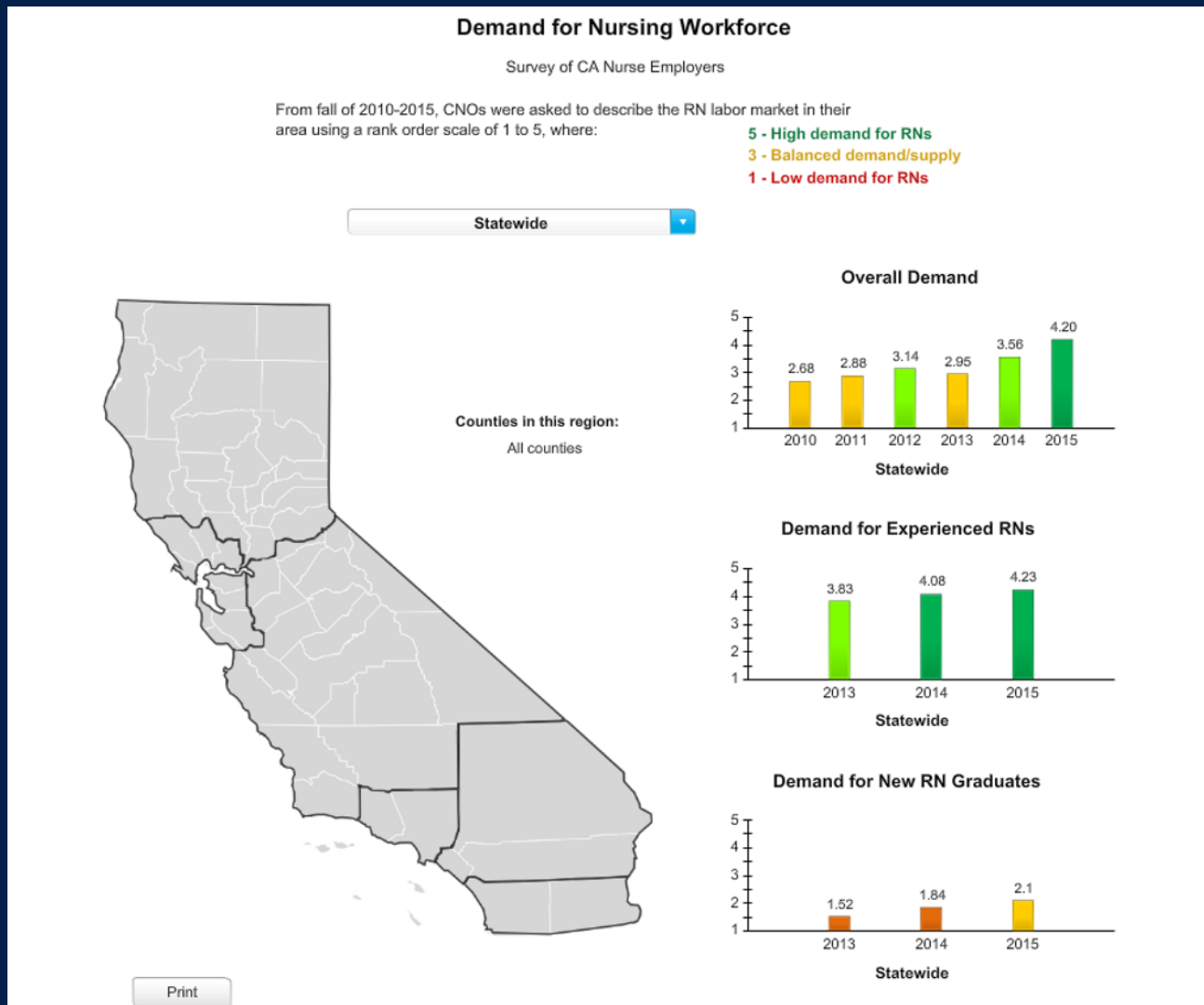
The registered nurse (RN) workforce is the largest group of health professionals in California, with over 371,000 licensed nurses. RNs work in every health care setting and provide care for millions of Californians every year. Active tracking of the supply of and demand for RNs is essential to ensure that there is an adequate number of nurses to meet future care needs. UCSF collaborates with organizations throughout California to collect and share data to support workforce planning.

Subscribe to mailing list

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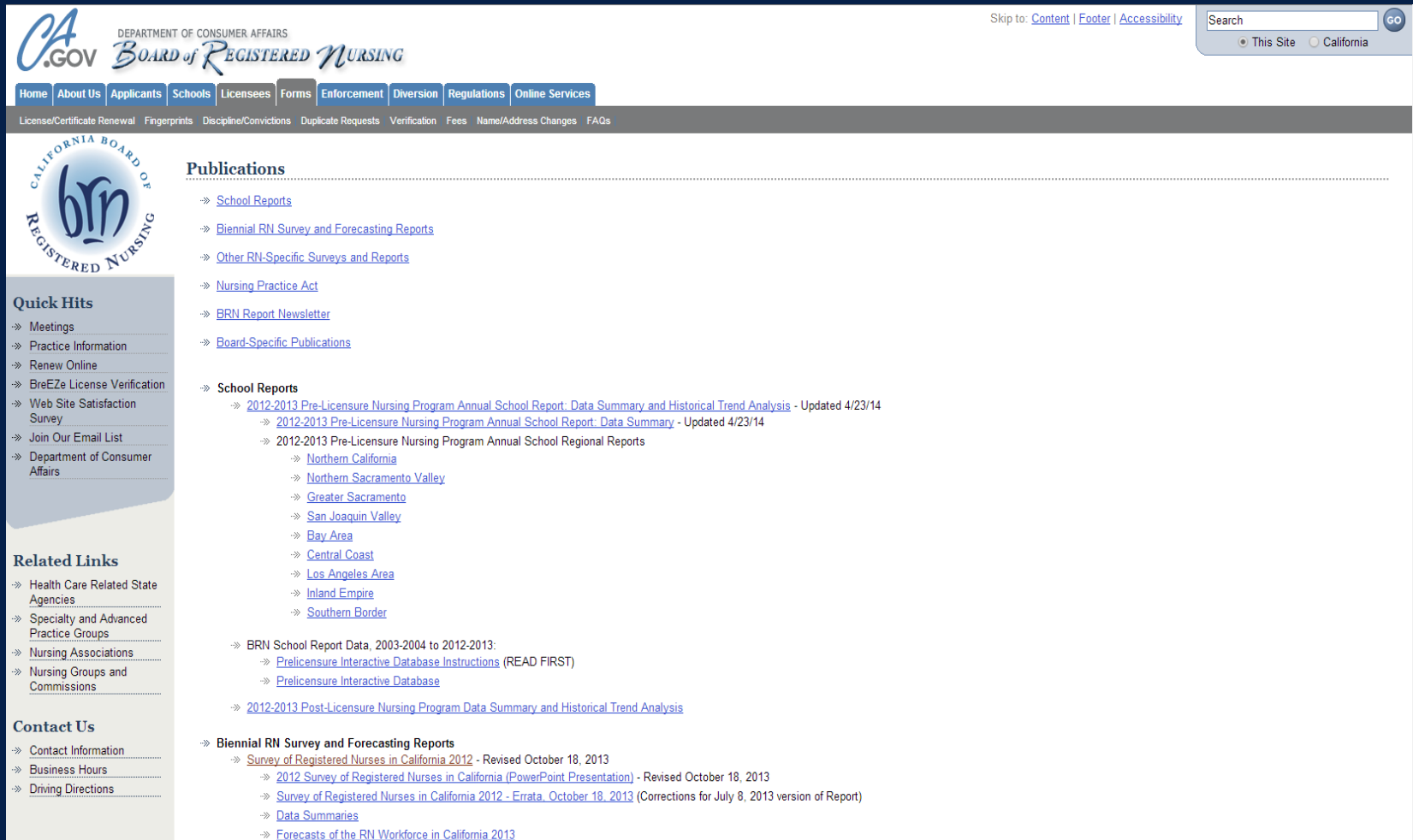
Submit

Interactive data displays



Also go to the BRN website

Forms → Publications



The screenshot shows the website for the California Board of Registered Nursing (BRN). The header includes the CA.GOV logo, the Department of Consumer Affairs, and the BRN logo. Navigation tabs include Home, About Us, Applicants, Schools, Licensees, Forms, Enforcement, Diversion, Regulations, and Online Services. A search bar is located in the top right corner.

Publications

- [School Reports](#)
- [Biennial RN Survey and Forecasting Reports](#)
- [Other RN-Specific Surveys and Reports](#)
- [Nursing Practice Act](#)
- [BRN Report Newsletter](#)
- [Board-Specific Publications](#)

Quick Hits

- Meetings
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- BreEZe License Verification
- Web Site Satisfaction Survey
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Related Links

- Health Care Related State Agencies
- Specialty and Advanced Practice Groups
- Nursing Associations
- Nursing Groups and Commissions

Contact Us

- Contact Information
- Business Hours
- Driving Directions

School Reports

- [2012-2013 Pre-Licensure Nursing Program Annual School Report: Data Summary and Historical Trend Analysis](#) - Updated 4/23/14
 - [2012-2013 Pre-Licensure Nursing Program Annual School Report: Data Summary](#) - Updated 4/23/14
 - 2012-2013 Pre-Licensure Nursing Program Annual School Regional Reports
 - [Northern California](#)
 - [Northern Sacramento Valley](#)
 - [Greater Sacramento](#)
 - [San Joaquin Valley](#)
 - [Bay Area](#)
 - [Central Coast](#)
 - [Los Angeles Area](#)
 - [Inland Empire](#)
 - [Southern Border](#)

- BRN School Report Data, 2003-2004 to 2012-2013:
- [Prelicensure Interactive Database Instructions](#) (READ FIRST)
- [Prelicensure Interactive Database](#)
- [2012-2013 Post-Licensure Nursing Program Data Summary and Historical Trend Analysis](#)

Biennial RN Survey and Forecasting Reports

- [Survey of Registered Nurses in California 2012](#) - Revised October 18, 2013
 - [2012 Survey of Registered Nurses in California \(PowerPoint Presentation\)](#) - Revised October 18, 2013
 - [Survey of Registered Nurses in California 2012 - Errata, October 18, 2013](#) (Corrections for July 8, 2013 version of Report)
 - [Data Summaries](#)
 - [Forecasts of the RN Workforce in California 2013](#)

Questions?

Thoughts?

Ideas?

Perspectives?

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