

Biennial Nurse Employer Survey: Capturing Florida Nurse Demand

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Executive Director**



Addressing Nurse Workforce Issues for the Health of Florida

Visit us at: www.FLCenterForNursing.org

Florida Statute 464.0195

✧ Established in 2001, the FCN purpose is to address issues of:

- Supply and demand for nursing.
- Recruitment, retention, and utilization of nurse workforce resources.
- Allocation of the state's resources.

✧ All reports are public

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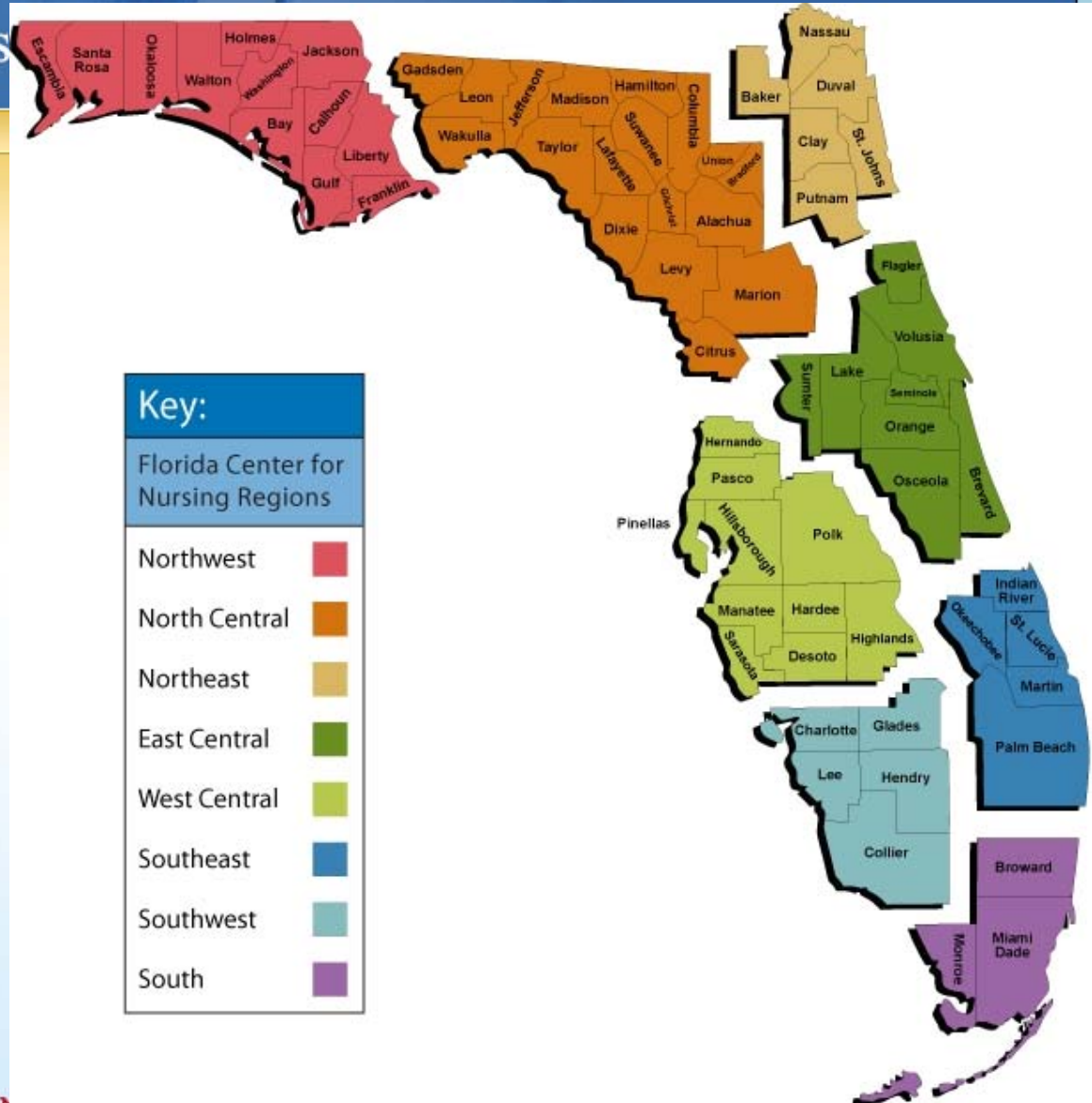
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How Information is Reported

- By State
- By Geographic Region
- By Licensure Level

How Information is Used

- By Academia
- By Industry
- For Policy and Resource Decisions



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Nurse Workforce Information

The nurse data “trifecta”:

- Nurse Supply Data – licensure and renewal survey data analyzed biennially (consistent with renewal cycle)
- Nurse Demand Data – employer surveys of 6 industries conducted and analyzed biennially (odd years)
- Nurse Education Data – LPN / RN pre-licensure and graduate programs surveyed and analyzed annually

These data elements permit forecasting



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Nurse Demand Survey

- ∞ Health workforce need for nurses is assessed every 2 years
 - Hospitals
 - Home Health
 - Skilled Nursing
 - Public Health
 - Hospice
 - Psychiatric Hospitals
- ∞ Last done in 2013



Survey Items

- ∞ # of Full-Time Employees / # of Part-Time Employees
- ∞ # of Vacant Positions / # of Separations
- ∞ # of New Positions Anticipated
- ∞ Use of Per Diem / Contract / Traveling / Agency Workers
- ∞ Maximum Hours Per Week Considered Part-time
- ∞ Nurse Residency Program
- ∞ Hire New Graduates / Preferentially Hire BSN Graduates
- ∞ Difficulty Recruiting – Position Specific
- ∞ Do they – promote advanced education, certification, etc.
- ∞ Do they – support the effort / pay a differential



Survey Responses

Industry Group	# Surveys Distributed	# Surveys Returned	Response Rate
Hospitals	272	109	40%
Home Health	750	121	16%
Skilled Nursing	342	79	23%
Public Health	67	38	57%
Hospice	43	15	35%
Psychiatric Hospital	36	12	33%
Totals	1,510	374	25%

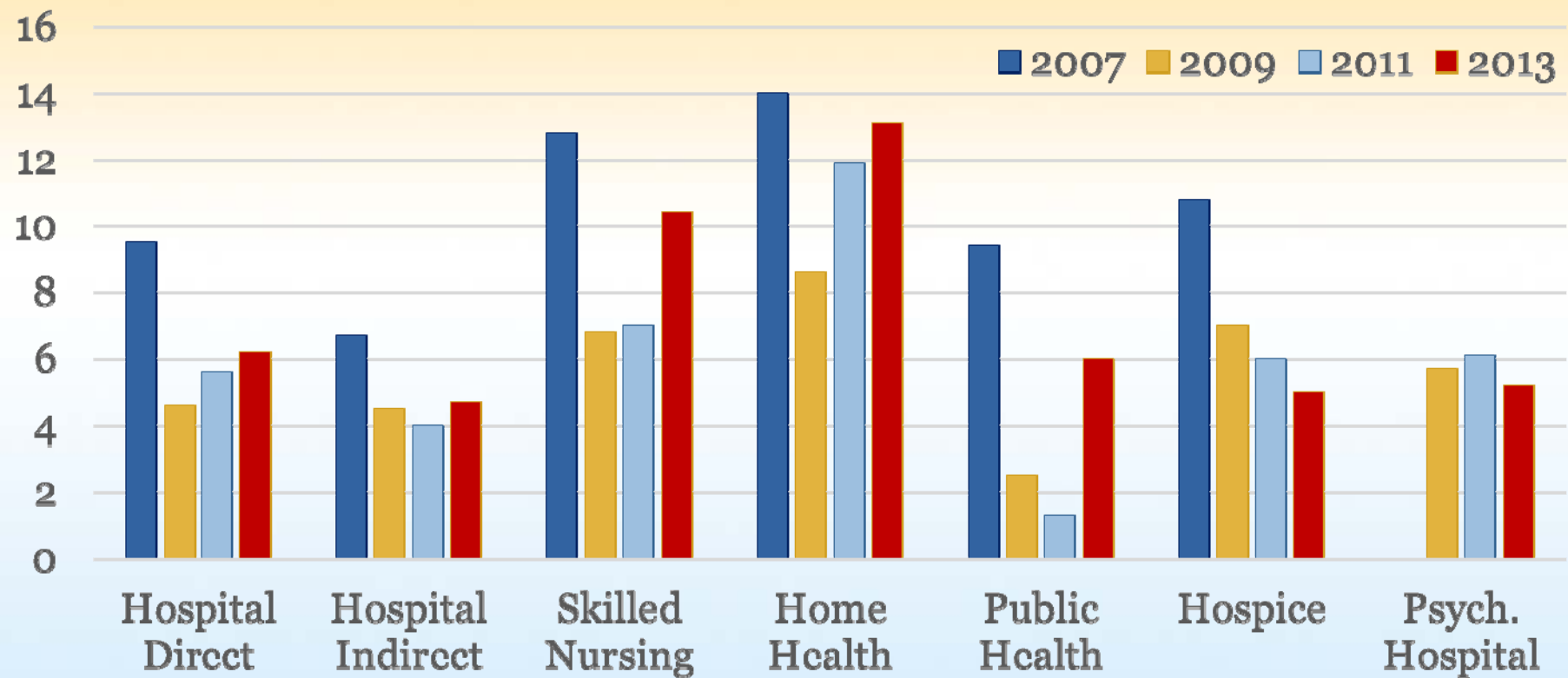


∞ Collaboration with Provider Associations

- Co-sign survey cover letter
- Encourage member participation



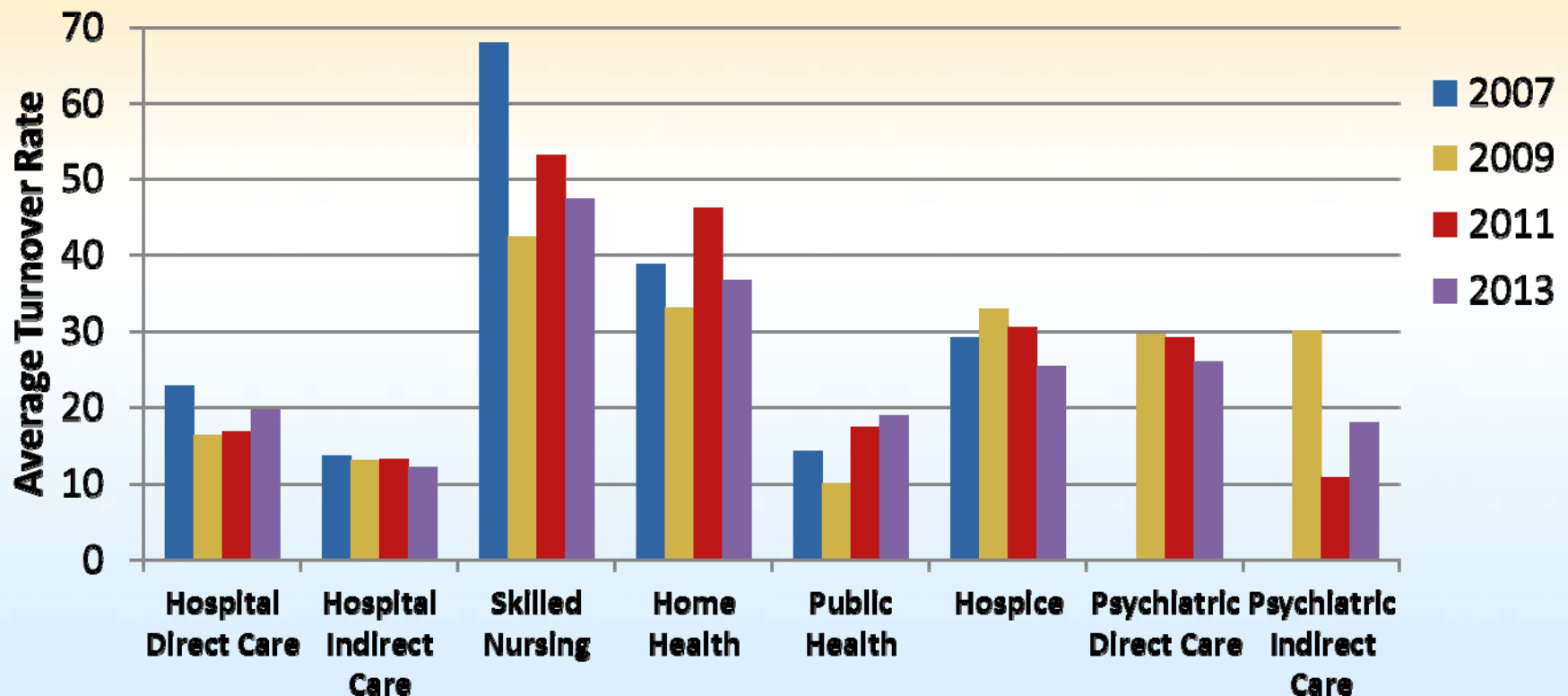
FTE RN Vacancy Rates (%) by Industry 2007 – 2013



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Average Turnover Rates RNs



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RN & LPN Projected Growth

	RN Growth	LPN Growth
Hospitals	785	N/A
Skilled Nsg. Facilities	<i>Inadequate</i>	<i>Information</i>
Home Health	3,159	1,754
Public Health	13	21
Hospice	112	62
Psychiatric Hospital	94	22
Total (all groups)	4,163	1,859



* 80% of Skilled Nursing Facilities did not answer questions on vacancies or growth in 2013



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Most Difficult Positions to Fill, by Industry

Rank	Hospitals	Skilled Nursing	Home Health	Public Health	Hospice
1 st	Adult Critical Care	Inpatient Staff RNs	Home Care Staff RNs	Clinic Staff Nurses	Home Hospice Staff RNs
2 nd	OR	Unit Manager	HHA/CNA	School Nurses	Patient Care Coordinators
3 rd	Emergency Dept.	Nurse Aides	LPNs	Nurse Supervisors	Inpatient Staff RNs (tie)
4 th	Cardiac Cath. Lab	LPNs	Admin	NPs and Midwives	Administrative (tie)
5 th	Unit Managers	Minimum Data Set Nurses	Infusion	Epidemiology Nurses	Nurse Practitioners (tie)



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Do we know demand?

∞ Actual survey of Florida nurse employers (2013)

- Current Need = 9,111 RN vacancies
- Future Growth = 4,163 RN positions

Demand = 13,274?

∞ Population Estimates

- Growth / In-Migration
- Age (Increasing age = Increasing Demand)

∞ Difficult to Fill Positions

Providing findings at state and regional level, by industry informs workforce planning to meet healthcare needs.



Closing Thoughts

- ❧ Reports are published on website
- ❧ Information is included in presentations and a variety of communication tools
- ❧ Data is used by academia, industry, workforce planners, policy developers, venture capitalists
- ❧ Challenges
 - Identifying contacts at institutions
 - Maximizing responses
 - Funding



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Using Employer Surveys to Assess Health Workforce Demand

December 16, 2014

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Senior Program Manager

Center for Health Workforce Studies

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The Center for Health Workforce Studies

- Based at the School of Public Health at SUNY Albany
- Not-for-profit academic research center
- Our mission is to provide timely, accurate data, and conduct policy-relevant research about the health workforce
- Our goal is to inform public policies, the health and education sectors and the public

The Center Produces An Annual Report on New York's Health Care Workforce



The Health Care Workforce in New York
Trends in the Supply and Demand for Health Workers

June 2014

Prepared by:

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Rensselaer, New York 12144-3445
(518) 402-0250
<http://chws.albany.edu>



Includes analysis based on both primary and secondary data

- Supply and distribution
- Education Pipeline
- Demand

<http://chws.albany.edu/archive/uploads/2014/08/nytracking2014.pdf>

Provides Statewide and Regional Analysis

Includes information on

- The population
 - Demographics
 - Health status and outcomes
- Primary care physicians
- Health Employment
 - By setting
 - By occupation
 - Projected growth in employment
- Current demand for health workers
 - Recruitment
 - Retention

Employer Demand Surveys: Who?

- Assesses health care workforce need by setting:
 - Hospitals
 - Nursing homes
 - Home health care agencies
 - Federally Qualified Health Centers

Employer Demand Surveys: What?

- Current recruitment & retention issues by occupation on Likert scale
- Reasons for those issues
 - Shortages of workers
 - Non-competitive salaries
 - Geographic location
- Also ask about
 - Need for off-shift workers
 - Bi-lingual workers
- Changes in the workforce based on service expansion or reduction or mergers
 - Affected health occupations

Home Care Survey

1. Please indicate the degree of difficulty recruiting and retaining the following workers at your agency and the reason(s) for difficulty.													Reasons: Check all the Apply			
1 = Very Easy 2 = Somewhat Easy 3 = Neither Easy nor Difficult 4 = Somewhat Difficult 5 = Very Difficult n/a = Not Applicable													Shortage of Workers	Competition for workers	Non-Competitive Salaries	Other
	Recruitment						Retention									
Dietitians/Nutritionists	1	2	3	4	5	n/a	1	2	3	4	5	n/a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Home Health Aides	1	2	3	4	5	n/a	1	2	3	4	5	n/a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Licensed Practical Nurses	1	2	3	4	5	n/a	1	2	3	4	5	n/a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Occupational Therapists	1	2	3	4	5	n/a	1	2	3	4	5	n/a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personal Care Aides/Homemakers	1	2	3	4	5	n/a	1	2	3	4	5	n/a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Physical Therapists	1	2	3	4	5	n/a	1	2	3	4	5	n/a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Registered Nurses																
Newly Licensed RNs	1	2	3	4	5	n/a	1	2	3	4	5	n/a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Experienced RNs	1	2	3	4	5	n/a	1	2	3	4	5	n/a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Respiratory Therapists	1	2	3	4	5	n/a	1	2	3	4	5	n/a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social Workers																
Licensed Clinical SWs	1	2	3	4	5	n/a	1	2	3	4	5	n/a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Licensed Master's SWs	1	2	3	4	5	n/a	1	2	3	4	5	n/a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Speech Pathologists	1	2	3	4	5	n/a	1	2	3	4	5	n/a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other: _____	1	2	3	4	5	n/a	1	2	3	4	5	n/a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other: _____	1	2	3	4	5	n/a	1	2	3	4	5	n/a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

High Response Rates Require Collaboration with Provider Associations

- Work with provider associations to:
 - Develop survey content
 - Publicize and follow up with non-respondents
 - Collect and share data
- For hospitals and community health centers
 - Surveys includes more detailed information
 - Healthcare Association of New York State and Greater New York Hospital Association:
http://www.hanys.org/workforce/survey/reports/2014_nursing_allied_workforce_survey_report.pdf
 - Community Health Care Association of New York State:
<http://chws.albany.edu/archive/uploads/2012/07/chc2011.pdf>
 - For home health and nursing home, surveys only about recruitment and retention issues. One page faxback survey.

Growing Interest in Emerging Titles

Title	Care Coordinator	Patient Navigator	Community Health Worker	Health Coach
Total FTEs				
Qualifications				
Education				
Years of experience				
Functions				

Findings from 2013 Demand Surveys

- All providers: experienced RNs hard to recruit, but newly trained RNs are not
- Hospitals: Hard to recruit and retain clinical laboratory technologists, HIT staff, medical coders and care coordinators
- Nursing homes and home health: Hard to recruit occupational therapists, physical therapists, speech language pathologists, dietitians/nutritionists
- Community health centers: Hard to recruit dentists, geriatric nurse practitioners and psychiatric nurse practitioners
- Nursing homes reported difficulty retaining CNAs, home health care agencies reported difficulty retaining personal care aides, and community health centers reported difficult retaining medical assistants



Closing Thoughts.....

- Real time demand surveys can help us better understand the current market for health workers
- Surveys across regions, settings and occupations can support trend analysis
- Findings from these surveys can inform regional and local health planning and workforce development



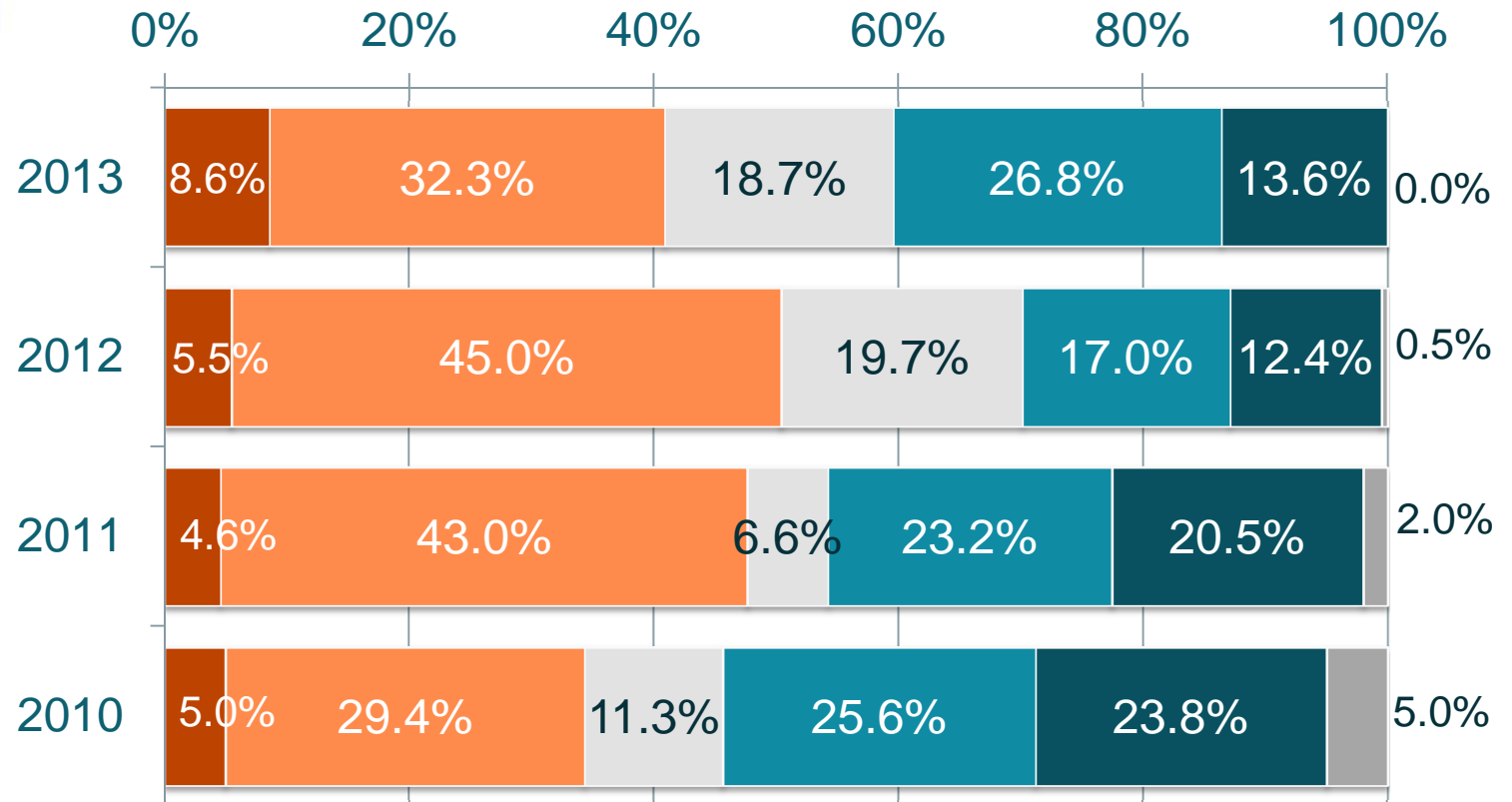
How Can You Forecast Future Demand for Nurses?

Joanne Spetz, PhD, FAAN
Philip R. Lee Institute for Health Policy Studies
Center for the Health Professions

California does employer surveys too

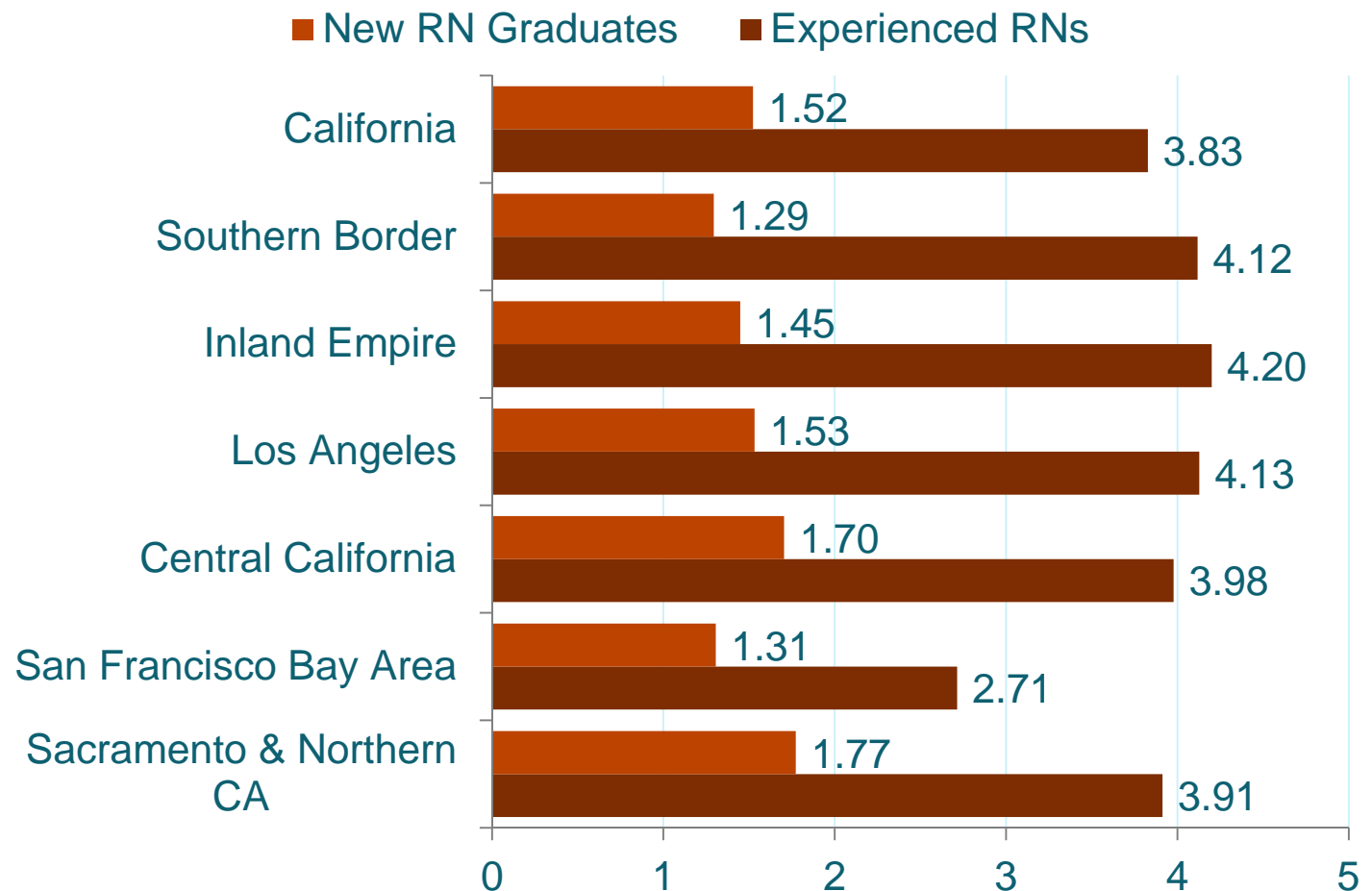
- **Hospital-focused**
- **Two components**
 - HR survey by Hospital Association of Southern Cal
 - CNO survey by UCSF
- **Questions based on past surveys & National Forum of State Nursing Workforce Centers “Minimum Demand Data Set” recommendations**
- **Six surveys conducted**
 - 2010-2013

Perceptions of employers: Overall labor market



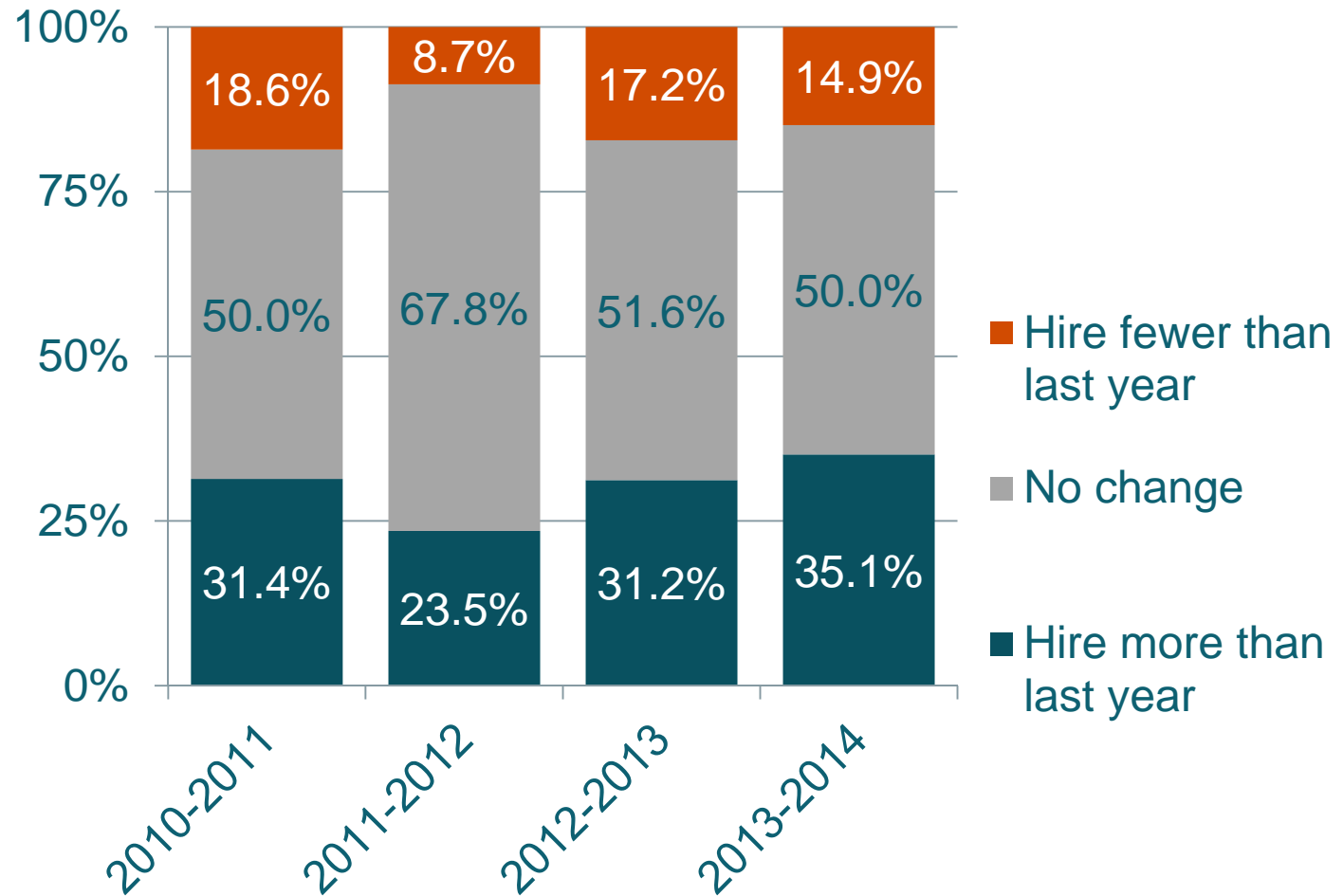
- High demand: difficult to fill open positions
- Moderate demand: some difficulty filling open positions
- Demand is in balance with supply
- Demand is less than supply available
- Demand is much less than supply available
- Other

Differences across regions: New graduates vs. Experienced RNs

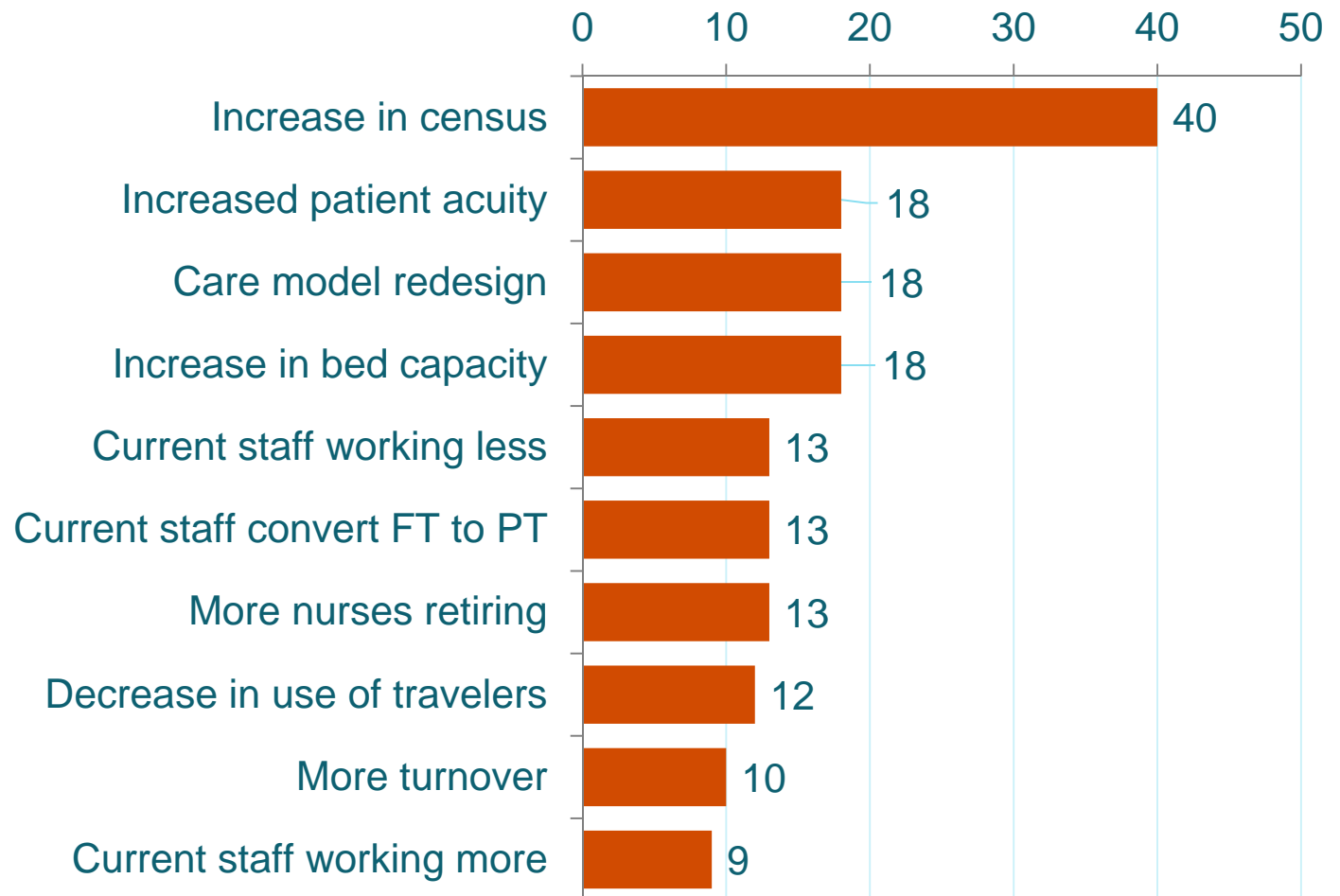


Higher number = more shortage

Overall hiring expectations for the next year

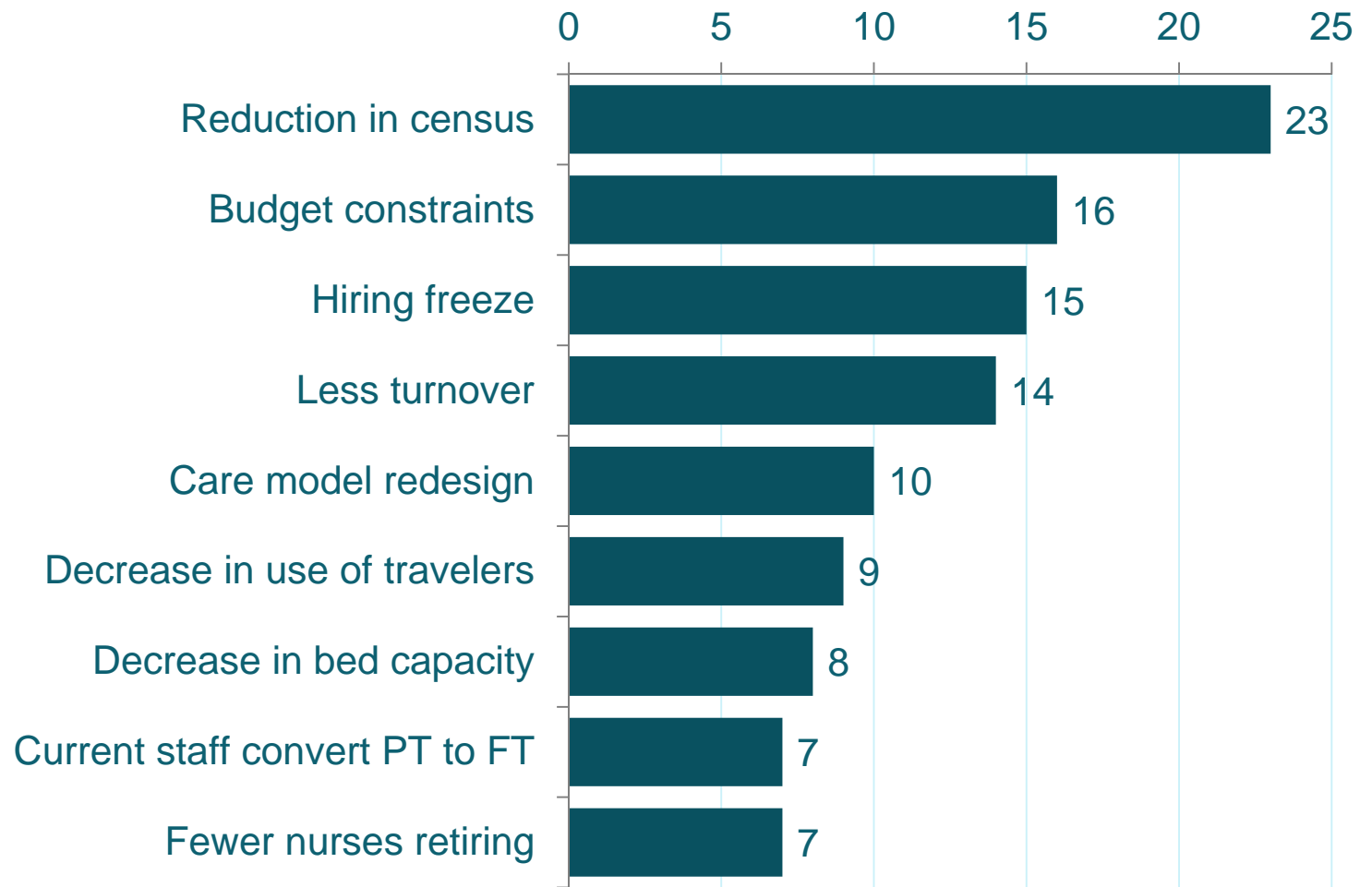


Reasons for expecting greater employment



Number of responses: 68 maximum possible

Reasons for expecting lower employment



Number of responses: 29 maximum possible

Do these hiring expectations help us project?

- **Questions are asked about the next 1-2 years**
- **Workforce planning requires more time**
 - Planning to expand / change RN education programs
 - Time for newly-admitted students to complete education
- **Many resources can help us do long-term forecasts**
 - Target a stable RN-to-population ratio
 - Use the Bureau of Labor Statistics 10-year projection
 - Leverage microsimulation model-based forecasts
 - Use the soon-to-be-released Bureau of Health Workforce model

Both short-term and long-term data matter

- **Employer surveys help understand the current state**
 - They can verify what you forecast
- **Forecasts help you identify long-term challenges**
 - They can support planning in the face of unexpected short-term changes

Resources for planning your own employer survey

<http://rnworkforce.ucsf.edu/resources/demandstates/>

- List of states that conduct employer surveys
- Information about the partnerships
- Links to questionnaires, reports

The screenshot shows a web browser window displaying the 'RN Workforce: California's RN Labor Market' website. The browser's address bar shows the URL <http://rnworkforce.ucsf.edu/resources/demandstates/>. The website has a navigation menu with links: Home, News, Demand Data, Supply Data, Education Data, Publications, Resources (highlighted), About Us, and Contact Us. Below the navigation menu, the page title is 'RN Workforce: California's RN Labor Market'. The main content area is titled 'States that Conduct Employer Demand Surveys of RNs'. It contains a paragraph explaining the importance of timely data for health care organizations and the role of the National Forum of State Nursing Workforce Centers. It also mentions that UCSF has collected information about data collection strategies used by states. A section for 'State' selection is visible, with a dropdown menu set to 'All' and the text 'State: California' below it. At the bottom, it lists 'Organizations involved: Betty Irene Moore Nursing Initiative, Philip R. Lee Institute for Health Policy Studies, University of California, San Francisco (UCSF) California Institute for Nursing & Health Care (CINHC) Hospital Association of Southern California (HASC)'. A sidebar on the right is titled 'RESOURCES' and contains links to 'States that Conduct Employer Demand Surveys of RNs' and 'Working with Data from NCSBN's 2013 Survey of Registered Nurses'.