RETAINING AGING NURSING WORKFORCE: An Integrative Review

KAISER PERMANENTE PANORAMA CITY MEDICAL CENTER
NURSING RESEARCH COUNCIL
Roque Garvida, RN, MSN
Nerissa Badillo, RN, MN, NNP, MBA

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Describe purpose and process of the integrative review.

Review driving forces leading to nursing shortage.

Examine characteristics and changing needs of an aging nursing workforce.

Identify evidence-based strategies for retaining senior nurses.

Identify barriers inhibiting retention of aging nurses.

List recommendations for retention.
“To identify evidence-based strategies to retain senior nurses in acute health care settings.”
PROCESS of Integrative Review

Initial Search
- Electronic databases: Pub Med, CINAHL, Ovid, Medline
- Search Keywords: Technology, Senior nurse, Seniors in the workplace

62 Journal articles & books
- Distributed to NRC members for review
- 30 excluded article/books: inappropriate population or setting; not answer research question; not available

32 Related Articles
- 12 research studies
- 20 expert opinions/consensus
| Country of Origin | USA = 8  
|                  | Australia = 4 |
| Sample Characteristics/ Settings | 40-60 yrs; new & experienced RNs of variable ages  
|                  | Urban/rural, acute, community, home health, nursing homes |
| Focuses of Study | Job satisfaction; intention to stay in workforce  
|                  | Retention strategies; impact of delayed retirement (only 1 study done outside USA)  
|                  | Aging concerns, experiences of the aging nurses |
| Limitations | Small sample sizes  
|                  | Variable study settings: rural, foreign, non-acute, and acute  
|                  | Variable focuses of study  
|                  | Poor generalizability of results |
DRIVING FORCES LEADING TO NURSING SHORTAGE

SUPPLY AND DEMAND

↓ SUPPLY
Massive number of nurse retirees
Declining number of nursing graduates as replacements

↑ DEMAND
Aging of the population (longevity)
Higher patient acuities requiring intensive care
Nurse retirees needing nursing care themselves
2010: 40% of nursing workforce reached ≥ 50 yrs. old  
(Hart, 2007)

By 2020: supply of nurses will be 20% below need  
(Cooper, 2003)

- 1 in 5 RNs will reach retiring age in the next 15 yrs.

By 2030: 71.5 million Americans will be ≥65 yrs. old  
(Eaton-Spiva, 2010)

Lack of nurses compromises quality of care and impact organizations’ sustainability

- Replacement cost ≈ 150% the salary of RN who left
- Retention of aging nurses can avert negative impact of nursing shortage.
GENERAL CHARACTERISTICS OF THE AGING NURSING WORKFORCE

**AGE**
- 45 years and older
- No consensus when:
  a) retirement begins
  b) a nurse is considered “older”

**PHYSICAL, SOCIAL, EMOTIONAL, & COGNITIVE TRAITS**
- Physical changes: ↑↑ aches and pains; ↑ risk for musculoskeletal injuries & chronic illness
- Cognitive changes: critical decision-making lag; may fall behind in acquiring new skills; ↓ concentration & short-term memory
- Social/emotional changes: responsibilities to care for the older parents; intergenerational issues

**NEEDS**
- Appreciation and recognition for work and years of service
- Culture of SAFETY: workplace redesign
- Latitude in decision-making
- To feel useful.
"We tilt our heads back to use our bifocals. Our knees are bad, our feet flat, backs out, and shoulders pulled. Sometimes when we run to the desk to get something, we can’t remember what it was we were running for by the time we get there.

We are old nurses. But we still have something not found in the new nurse, something worth more than being swift. We have experience…"

“Older workers are unwilling to try new things.”

Older workers are less agile or quick, so they’re of little value.”

“Older workers are less driven because of burnout or proximity to retirement.”

“Older workers are unwilling to learn new technology.”
WHAT MOTIVATES OLDER NURSES? (Cohen, 2006)

- Ages 40-49 years
  1. Money
  2. Enjoyment of work
  3. Usefulness

- Ages 50-59 years
  1. Enjoyment of work
  2. Usefulness
  3. Money
7 GROUPS OF STRATEGIES for Retaining Aging RN Workforce (Summary of Evidence)

1. Assess job attitudes, characteristics of aging workforce, and intent to leave
2. Promote a culture that support the needs of the aging RN workforce
3. Promote work-life balance of the aging RNs
4. Improve work conditions to decrease physical workloads and mental stress
5. Boost professional status and career enhancement/development
6. Restructure /redesign recognition & pay/benefit packages
7. Promote healthy lifestyle and wellness programs
1. Assess job attitudes, characteristics of aging workforce, and intent to leave

Use data to a) create policy and procedures for retention & b) structure/design retention strategies
### The Older Worker Lure (OWL) Scale

By McIntosh, Palumbo and Rambur, 2010

**Figure 1. The Older Worker Lure (OWL) Scale: Rate Your Organization**

A. Within your organization, to what extent are the following methods used to enhance career management for the older nursing workforce? (For each method, circle the number that best represent your answer)

<table>
<thead>
<tr>
<th>Method</th>
<th>Not interested</th>
<th>Not doing</th>
<th>Would like to do</th>
<th>Doing</th>
<th>Doing well</th>
</tr>
</thead>
<tbody>
<tr>
<td>Continuous development emphasis</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Supervisor (manager) counseling regarding age diversity</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Career opportunity discussions</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Formal career ladder program</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Succession planning</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Nurse exchange programs with other organizations</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Tuition reimbursement</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>In-service education support</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Age diversity training</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Recruitment of older nurses</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

**Total Score for A ___________**
B. Rate your organization’s efforts in the following areas. (For each area, write the number that best represents your answer on the line.

<table>
<thead>
<tr>
<th>Not interested</th>
<th>Not doing</th>
<th>Would like to do</th>
<th>Doing</th>
<th>Doing well</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

- _________ Ergonomic assessment for all work spaces
- _________ Work redesign to eliminate lifting
- _________ Mentoring roles for the experienced staff
- _________ Research and quality assurance roles for experienced staff
- _________ Environmental modifications as needed in work areas [such as to decrease walking]
- _________ Skills updates in formats that are older-worker friendly
- _________ Support for those transitioning to new roles or work settings [when needed]
- _________ Career management support at any age
- _________ Adequate financial support for continuing education and tuition
- _________ Lifestyle support [such as support for caregivers, travel leave options, etc.]
- _________ Wellness programs
- _________ Flexible hours, shifts, or schedules [or a combination of these]
- _________ “Snowbird” opportunities [seasonal exchange of workers]
- _________ Visible pathways for redesigning work to match individual talent
- _________ Periodic review of RN job description

**Total Score for B: __________**

**How your organization scored:**
- 125-106: Excellent, congratulations
- 105- 86: Very good, you are on the right tract
- 85- 66: Good start
- 65- 46: Lots of work to be done
- 45- 25: Actions are needed

**Total combined score for A and B: __________**
2. Promote a Culture That Supports the Needs of the Aging RN Workforce

Managerial Skills

Senior Nurse Advisory Board

Transformational Leadership

Organizational Communication

Diversity & Sensitivity Training on “Aging”

Mentoring Program

Worker-friendly Hospital Environment

Teamwork
Flexible Work Options
- Self-scheduling
- Job-sharing
- Compressed schedule
- Weekend only work (WOW)
- No mandatory overtime
- Annualized work hours

Phased Retirement

Caregiving
(child and elder care)
Grief Resources

Referral System
for access to services and resources
WHAT IS PHASED RETIREMENT?

- Reduced workload or Decreased work hours or Change in role responsibilities
  - (Hill, 2010)
- Supports a slower transition to full retirement.
- Facilitates knowledge transfer from older to younger nurses.

- Barriers: pension structure, union contract
MANAGEABLE PATIENT-NURSE RATIO AND WORKLOADS

- Skill mix
- Work rotation
- Reduction of floating & overtime
- Accommodation of physical limitations

JOB SCULPTING:
Re-defining, Re-designing work roles, & Re-skilling
- Alternative roles: mentor, telephone triage, instructor for new employees, preceptor, etc.

HIRE AUXILIARY HELP to perform non-nursing tasks

ERGONOMICS
- Modify workplace environment; change equipment designs

INJURY PREVENTION PROGRAMS
- Lift team
- Educational programs

USE OF ELECTRONIC MEDICAL RECORD (EMR)

OPTIMIZE INTERNET AND INFORMATION TECHNOLOGY
5. Boost Professional Status and Career Enhancement/Development

- Talent management
- Workforce planning; Succession planning
- Alternative Positions
- Career-Coaching Model
- Frequent training and re-training
- Lifelong learning programs
- Tailored training for new technology
- Promote autonomy and empowerment
- Transformational leadership
- Magnet status
Transformational leadership

Models & Motivates

Builds Trusts

Inspires, Challenges, Enables

Empowers

Encourages greatness

Transformational leadership

“Leadership Style Holds The Key To Retention” - Lobo (2010)
Magnet hospitals have superior nurse retention, low nurse turnover, decreased burnout, & excellent patient care outcomes (Hatcher et. al (2006)).

8 Essential forces of magnetism that create an environment of excellence (Hatcher et. al 2006):

- Clinical autonomy
- Organizational autonomy
- Good nurse-physician relationships & communication
- Opportunity to work with other competent nurses
- Supportive managers/supervisors
- Support for education
- Adequate staffing
- Concern for patient
6. RESTRUCTURE/ RE-DESIGN RECOGNITION & PAY/ BENEFIT PACKAGES= EQUITABLE

- Pay / Compensation Packages
- Phase Retirement
- Pre-retirement Seminars & Financial Planning
- Feedback, Rewards & Recognition Programs
7. PROMOTE HEALTHY LIFESTYLE & WELLNESS/ PREVENTATIVE PROGRAMS

Meet RNs basic needs
- Restructure tasks assignments
- Longer breaks

Establish employee assistance program

Recognize changing health needs of aging RNs

Managerial training on health needs of aging RNs

Launch wellness programs
Barriers to the Retention of Aging Nursing Workforce

- Ageism, Age Discrimination
- Organizational Changes
  - Downsizing, mergers
  - Poor commitment
- Union Policies, Contract
- Retirement Policies
- Economic Factors (lack of funding)
Recognize “PUSH” AND “PULL” Factors for Retirement:

**PUSH Factors**

Negative

- *Examples*: poor health, dislike of job or position

**PULL Factors**

Positive

- Lured toward retirement
  - *Examples*: pursuit of leisure & volunteer interests

(Hatcher, et al., 2006)
RECOMMENDATIONS

CONDUCT SURVEYS
• Get input from RNs
• Establish retention policy and procedure
• Design and choose strategies based on needs
• Bridge the gap between existing strategies and assessed needs of aging RNs

PROMOTE “AGING-SUPPORTIVE” CULTURE
• Leadership
• Educational programs

ACCOMMODATE NEEDS RELATED TO AGING
• Workplace redesign
• Job sculpting
• Phased retirement
• Work-life balance
• New Technology Training

IDENTIFY AND ADDRESS BARRIERS TO RETENTION
• Identify “Push” and “Pull” factors
• Further research

RE-DESIGN REWARDS AND RECOGNITION
• Promote equitable remuneration

BOOST PROFESSIONAL STATUS AND CAREER DEVELOPMENT
• Magnet status
• Transformational leadership
• Workforce planning
What do we really lose when people leave?

We lose “Efficiency Knowledge”, i.e., how to get a job done faster and better.


Retaining older nurses *significantly* mitigates negative impact of nursing shortage on organizational performance & productivity
**WHY RETAIN OLDER NURSES?**

**Knowledge and Wisdom**
- Superior communication skills

**Experience**
- Wealth of experience
- Ability to care for the most challenging patient

**Work Ethics**
- Excellent work ethics
- Loyal and dedicated to organization

**Reliability**
- Take fewer sick leaves unless they have major illnesses
References


References


References


References


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