



University of California
San Francisco

Survey of Nurse Employers in California & Other Hot Topics

September 22, 2017

Partners for this work....



University of California
San Francisco



Janet Coffman at UCSF

Topics today

- Is there an RN shortage in California?
 - Will there be one in the future?

- Is there a shortage of primary providers?
 - Will there be one in the future?

- Solutions to these problems?

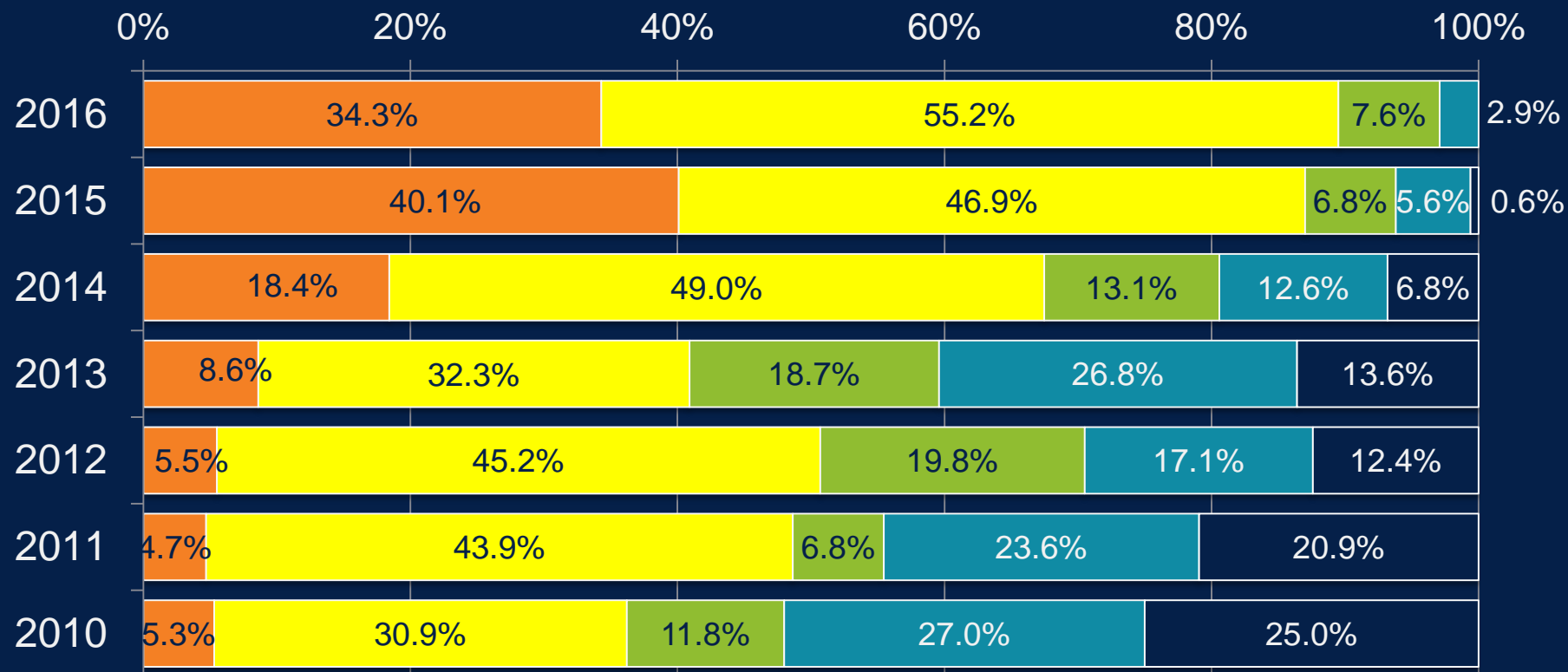
What is going on in our RN labor market?

- Newspaper stories of new graduates who are unemployed
 - Hospital reports of inability to fill key nursing positions
 - Anecdotes about using more contract nurses
-
- What will happen next?

Survey of Chief Nursing Officers

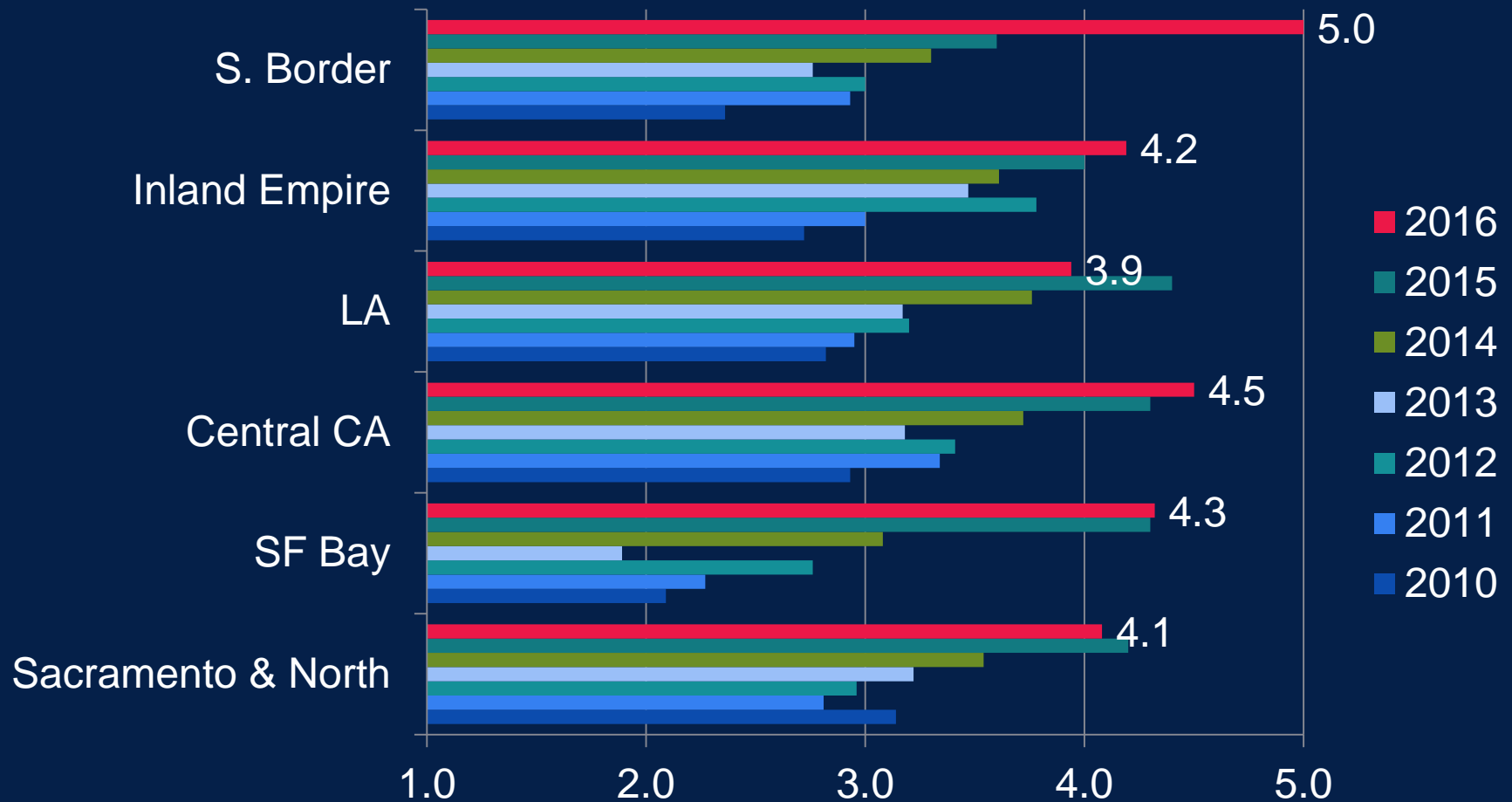
- Fielded by UCSF
- Web-based survey with option to return paper survey via fax or email
- 8 surveys conducted
 - Fall 2010, Spring 2011, Fall 2011, Spring 2012, Fall 2012, Fall 2013, Fall 2014, Fall 2015
 - Fall 2016 survey: 104 facilities represented

Perceptions of employers: Overall labor market

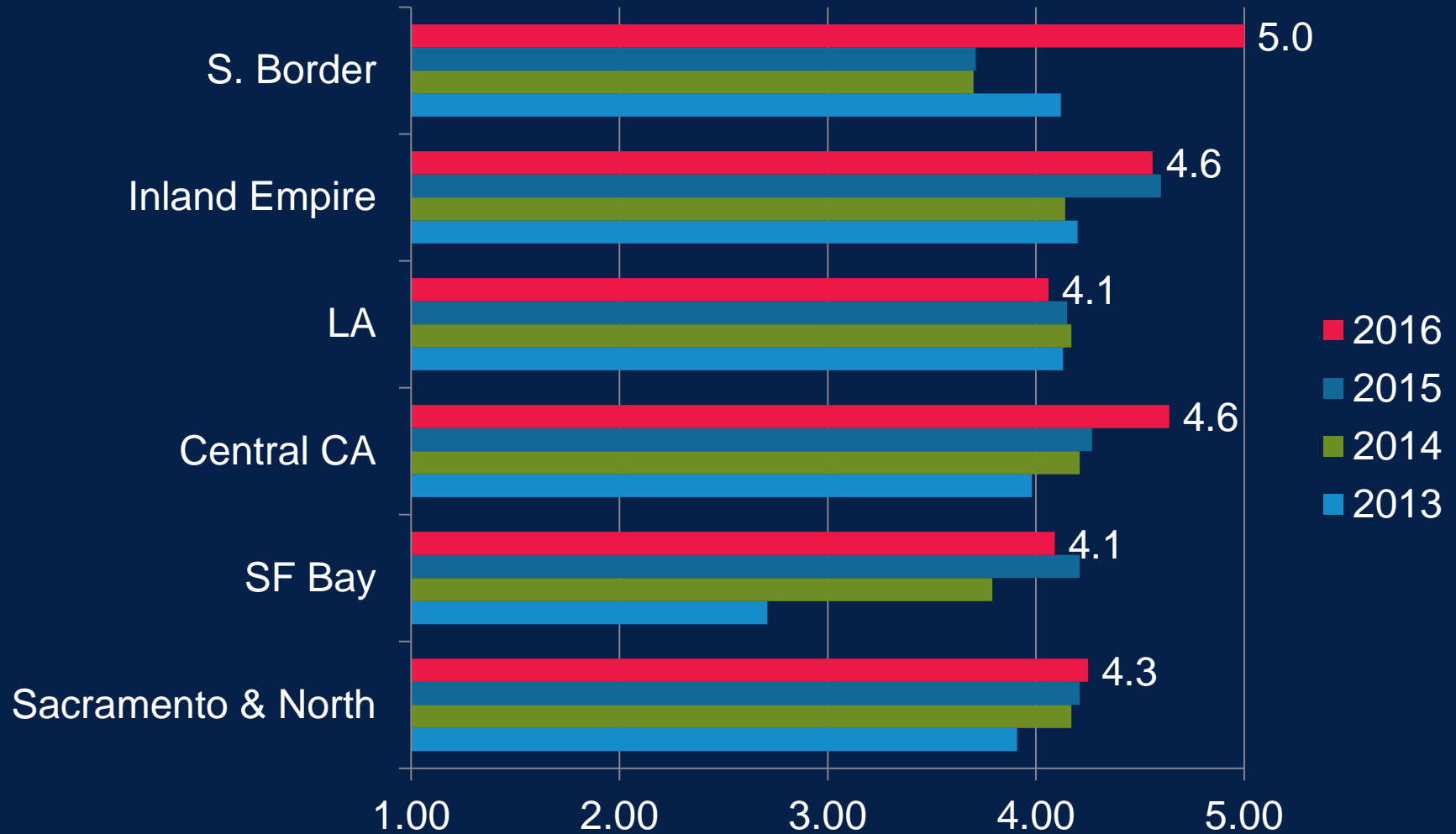


- High demand: difficult to fill open positions
- Moderate demand: some difficulty filling open positions
- Demand is in balance with supply
- Demand is less than supply available
- Demand is much less than supply available

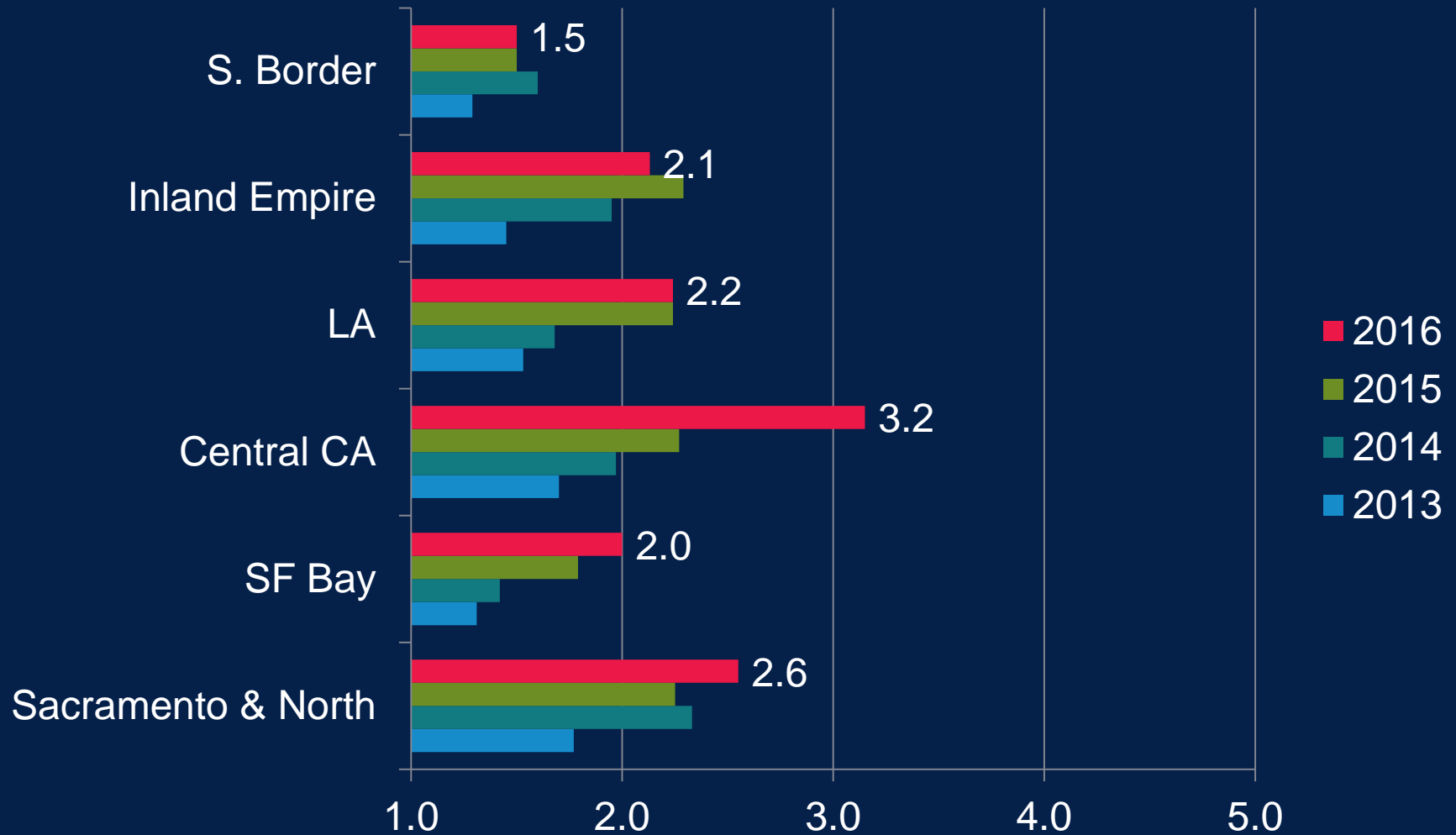
Differences across regions: Overall RN labor market



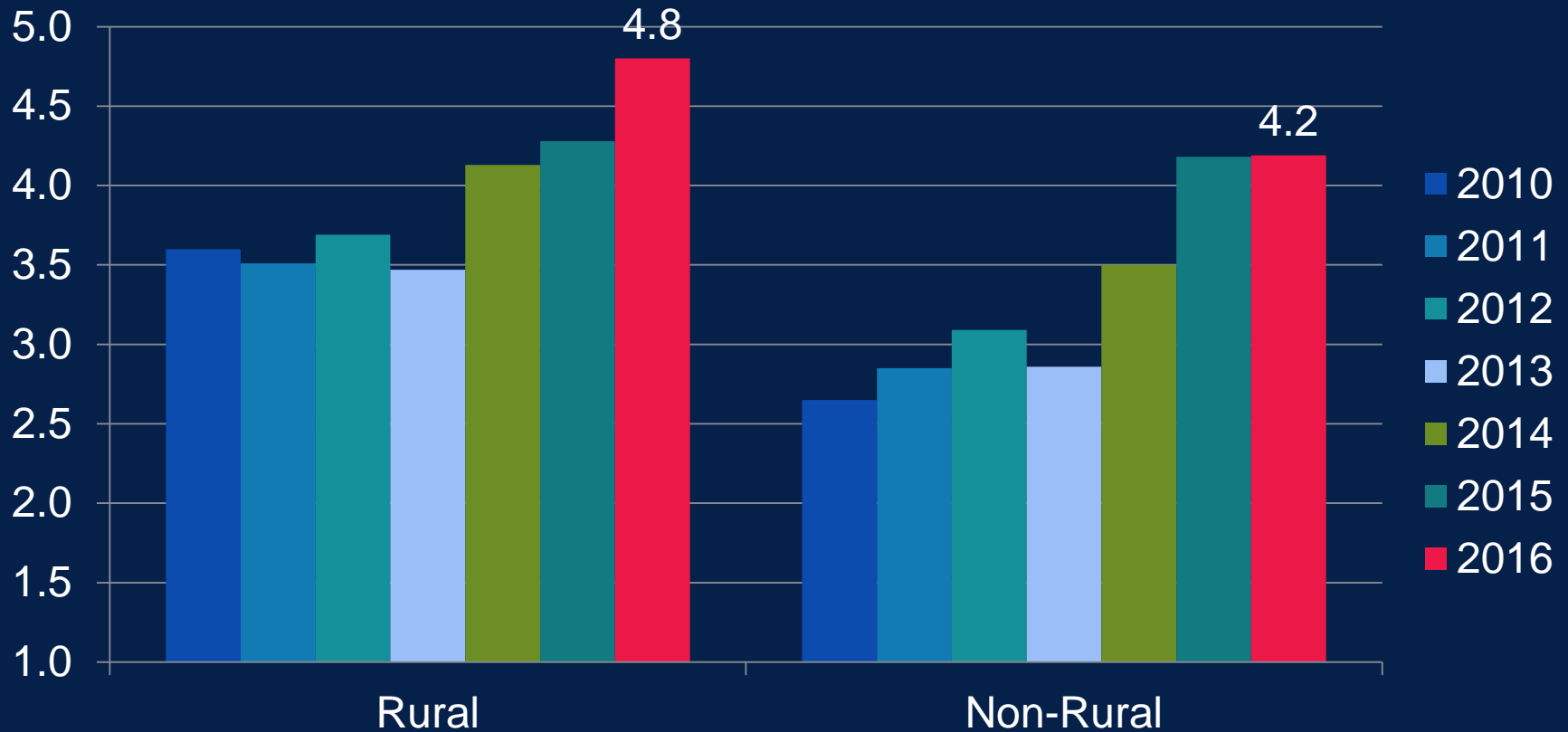
Differences across regions: Experienced RNs



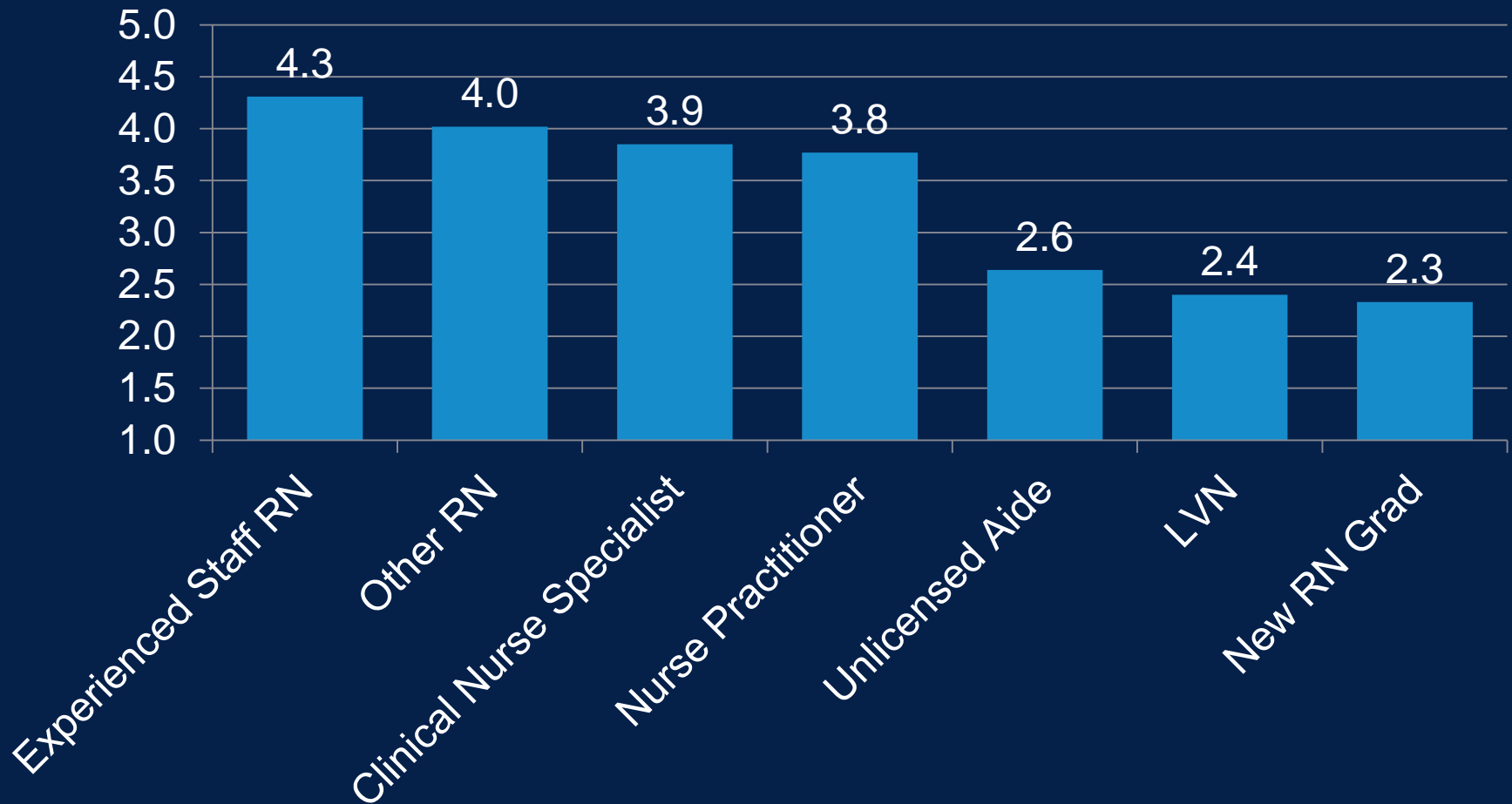
Differences across regions: New Grad RNs



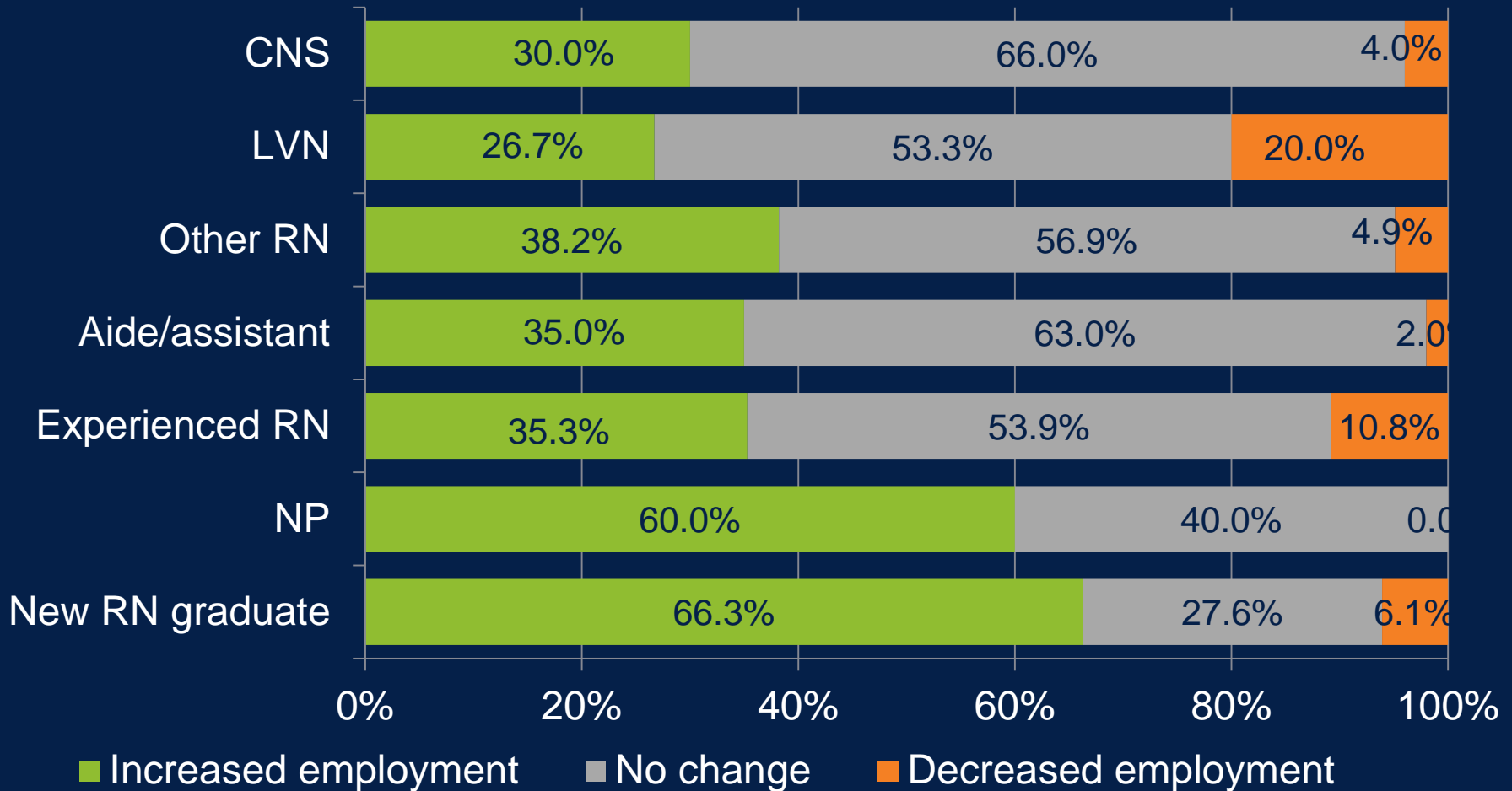
Rural vs. urban perceptions



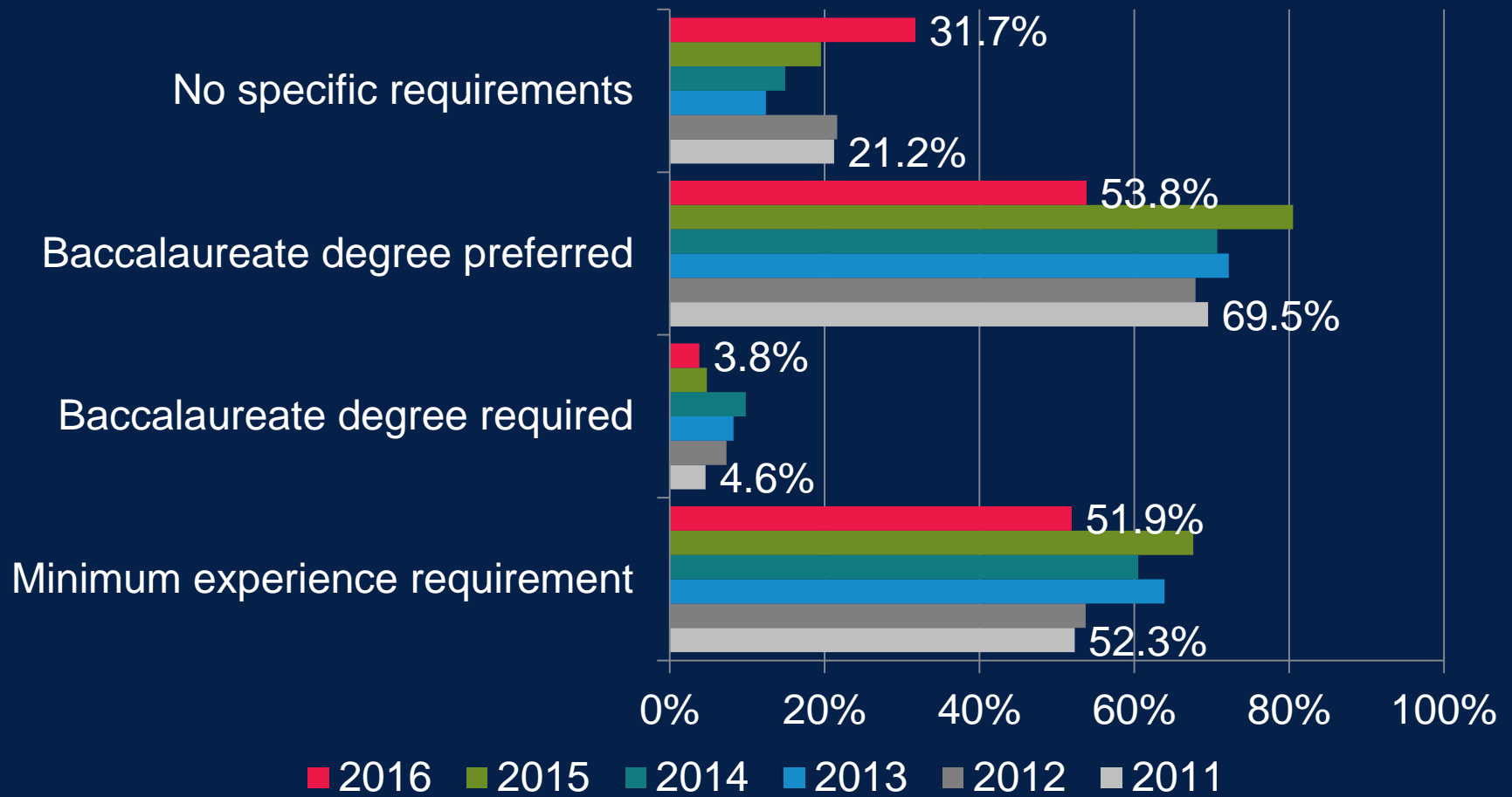
Average ranking of the RN market by position



Change in employment in the past year (2015 - 2016)



Hiring requirements and preferences



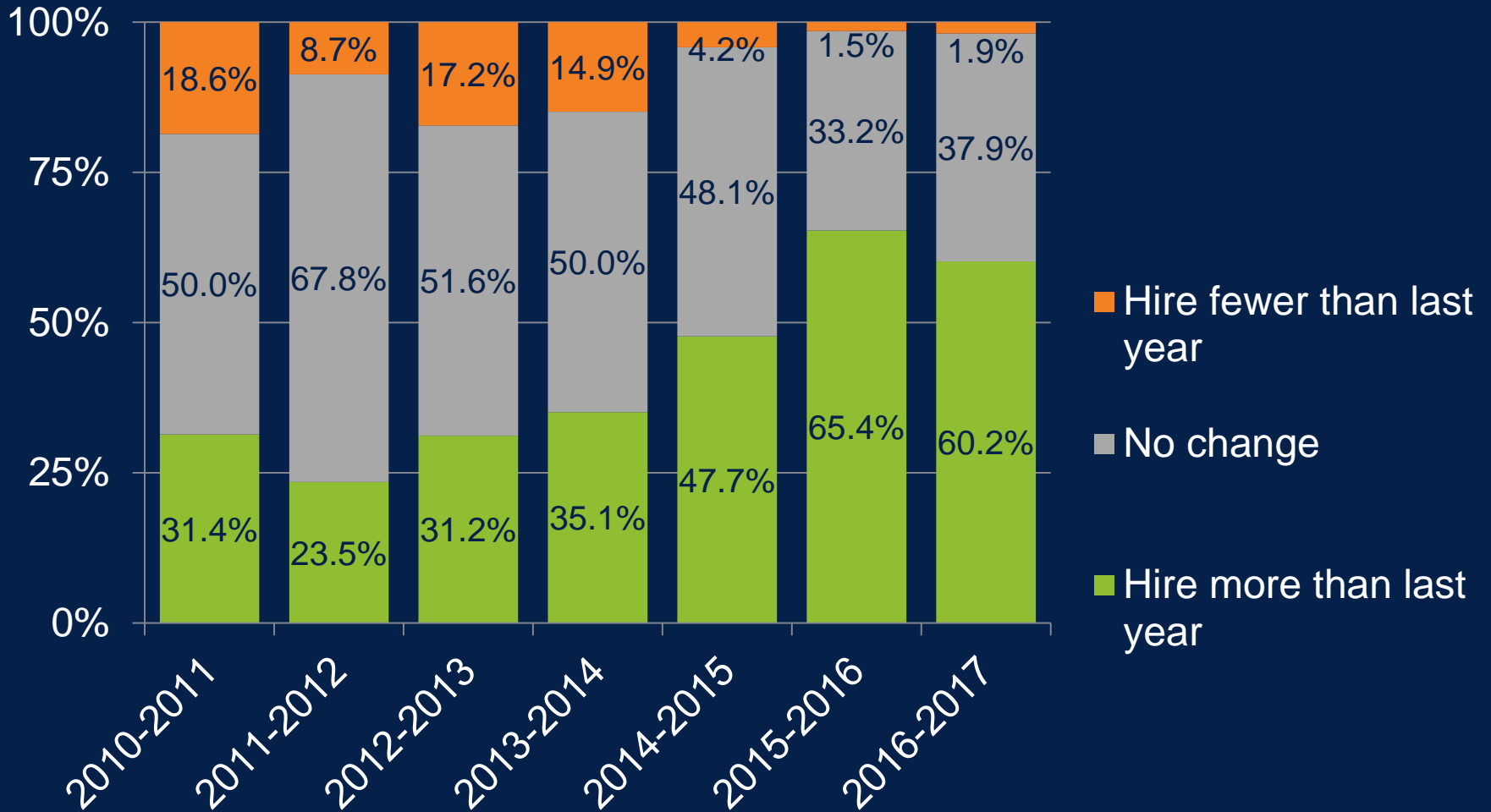
Plans regarding BSN-educated nurses, 2015

- 67% plan to increase the share with BSN
(75% in 2015; 71% in 2014; 66% in 2013)
- 9.9% require that hired RNs obtain a BSN within a certain time
(8.7% in 2015)
- 56.3% require a BSN for promotion beyond staff nurse
- 39% differentiate RN salary by education degree
(32% in 2014 & 2015)

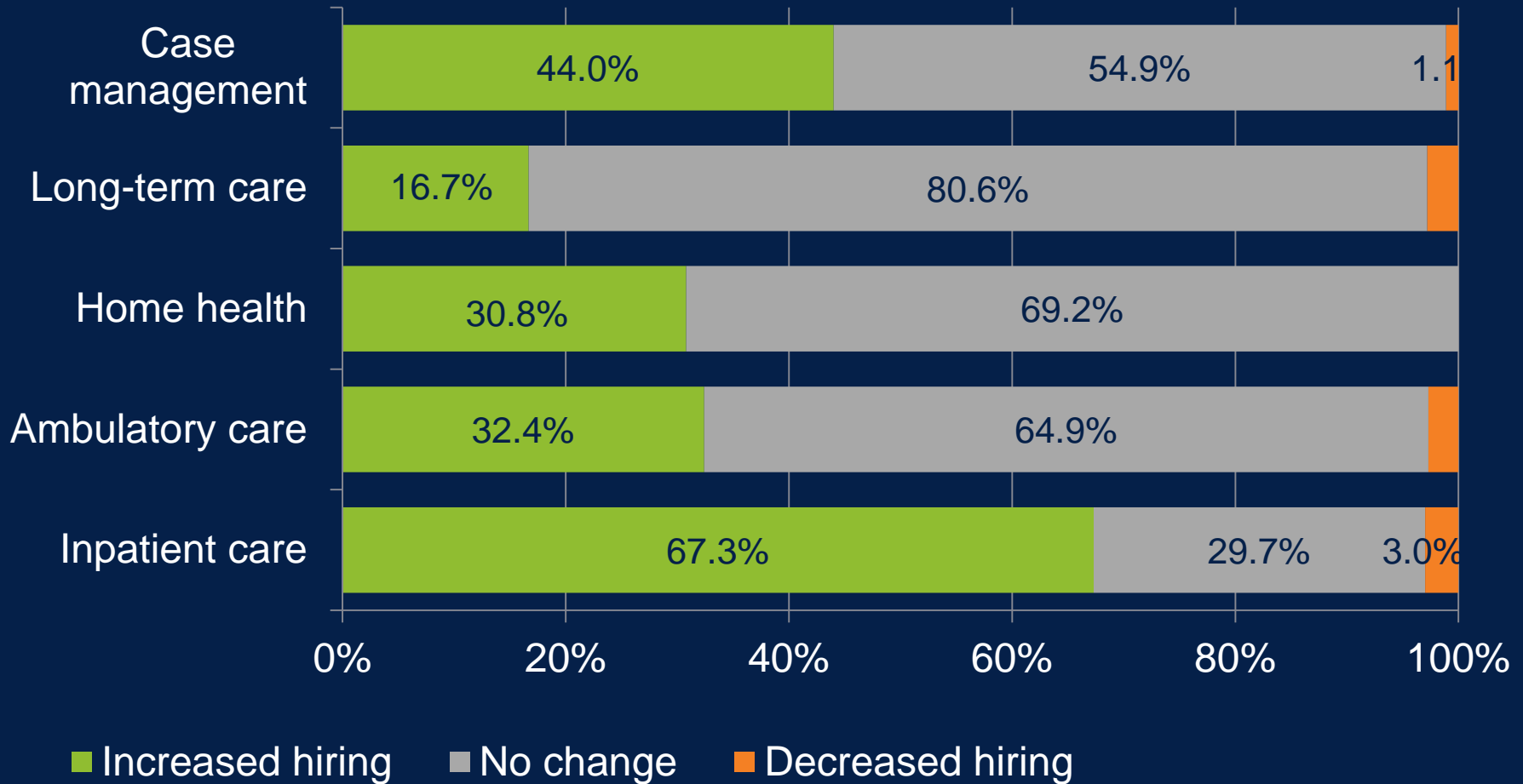
Challenges to increasing the share of BSN-educated RNs

- 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
 - Scheduling / staffing barriers
 - Lack of BSN nurses in community
 - Lack of BSN programs in community

Overall hiring expectations for the next year



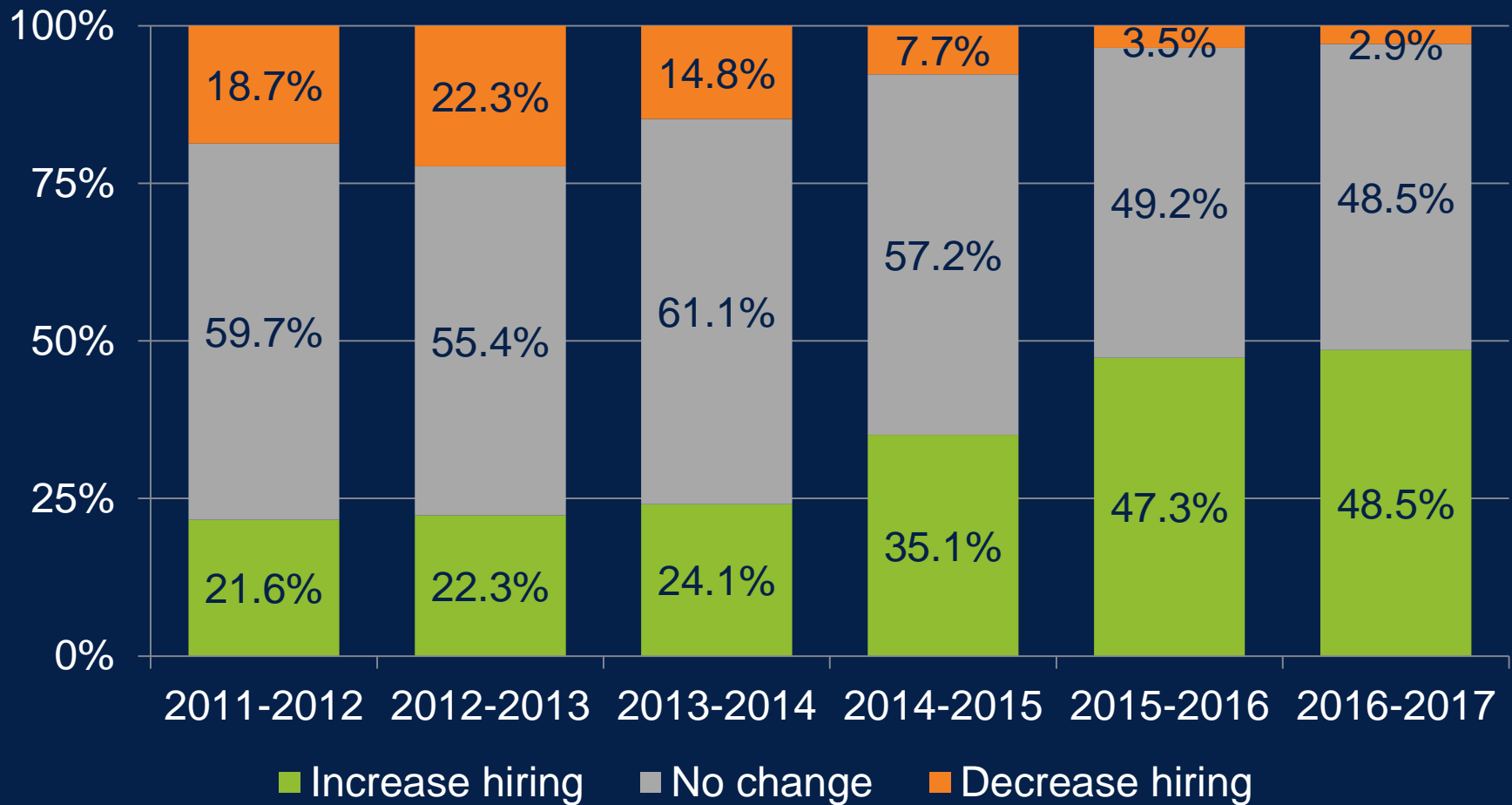
Expected RN hiring by care setting for next year (2016 - 2017)



Residency programs for non-employee new graduates, Fall 2016

- About 1/5 of hospitals reported a residency program
 - Similar rate as last survey
 - 64% paid program
- 77% of hospitals said 75-100% of residency completers were hired in last year
 - 23% said they hired less than 25%

Hiring expectations for new graduates



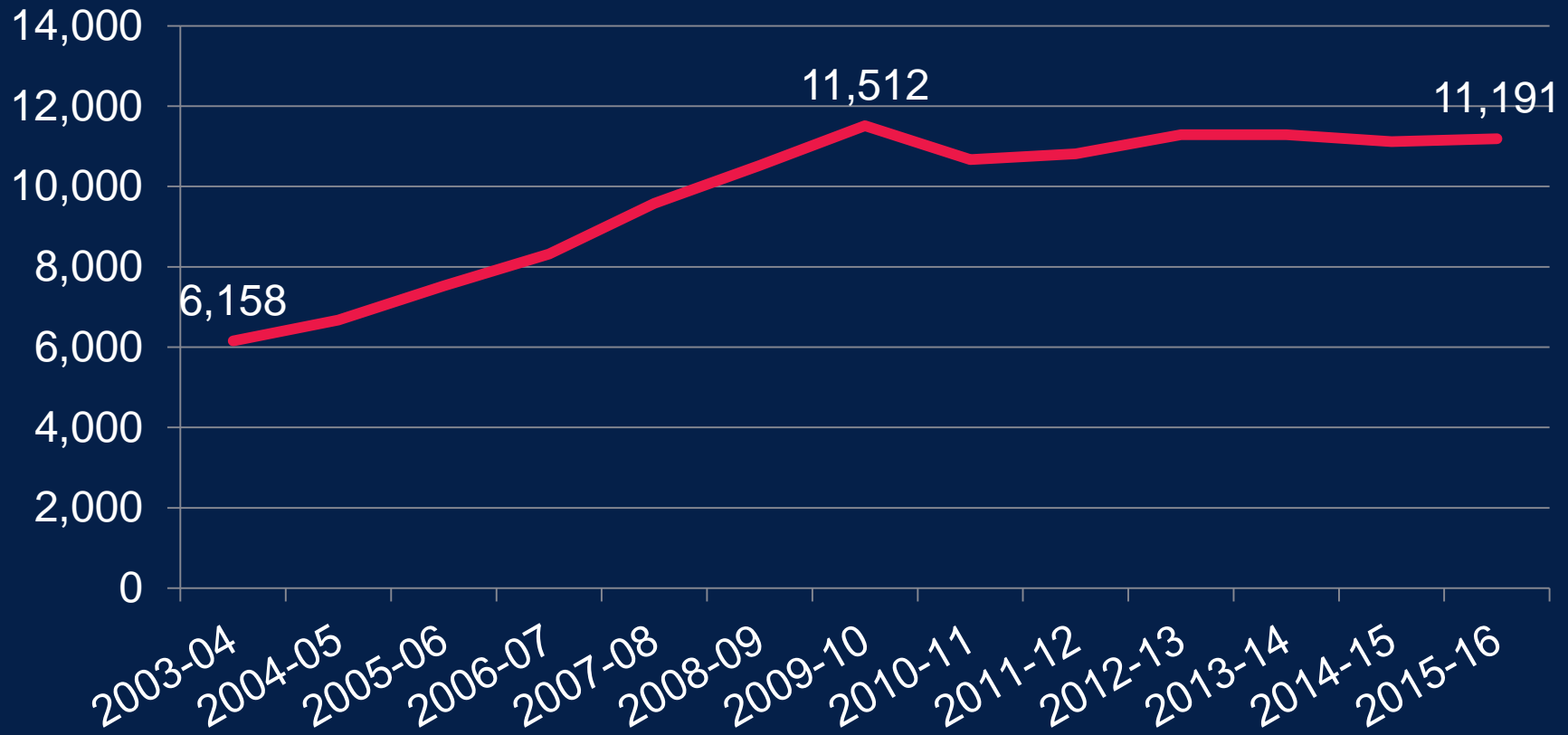
Reasons for expected increase in new graduate hiring

- Lack of available experienced RNs
- Expected retirement of incumbent RNs
- Recently developed relationships with RN education programs to prepare new graduates for needed roles
- Recently developed mentoring programs for new graduates

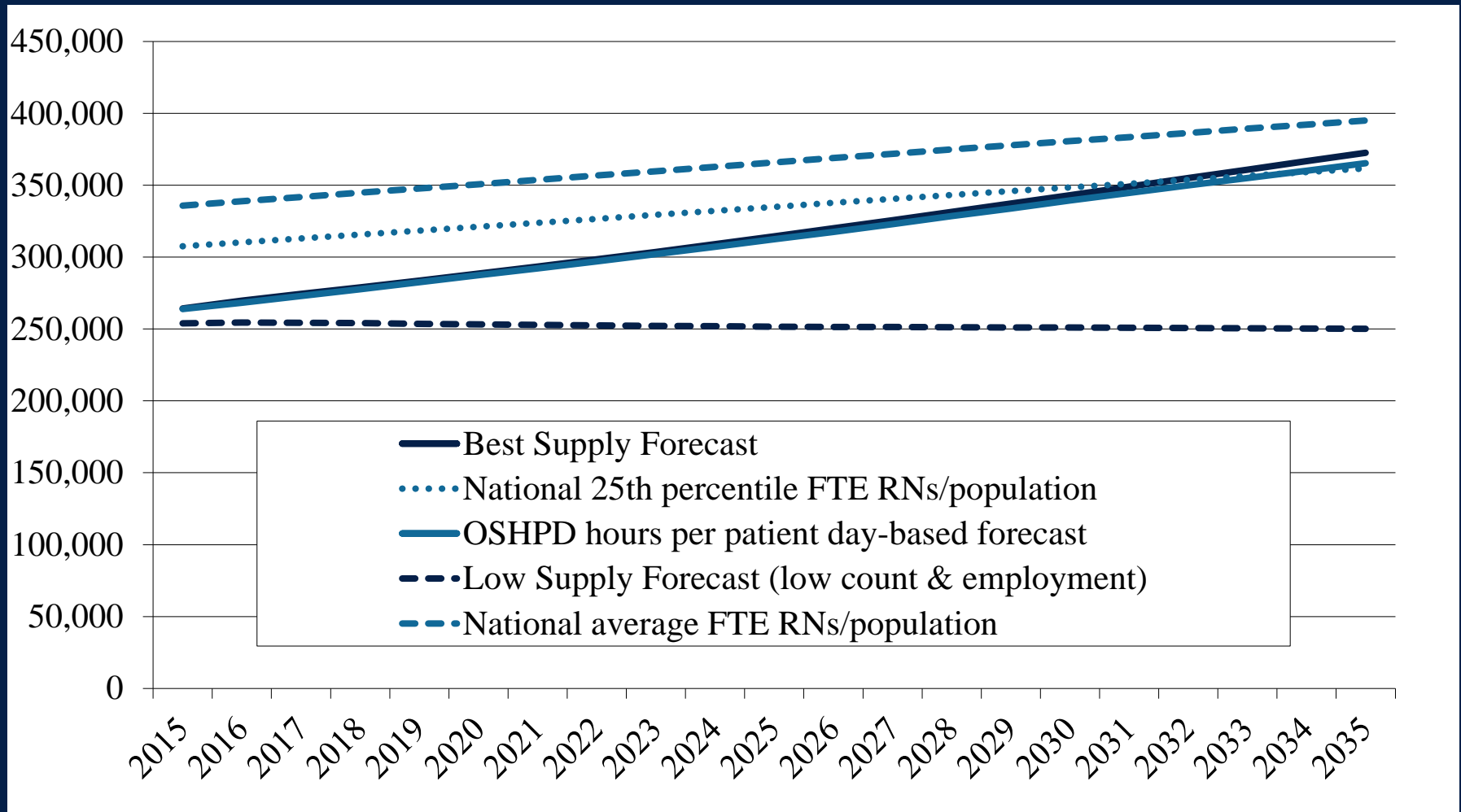
What is happening now?

- 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
- Expected retirements of RNs

California RN graduations per year



Best supply and demand forecasts for RNs, 2015-2035

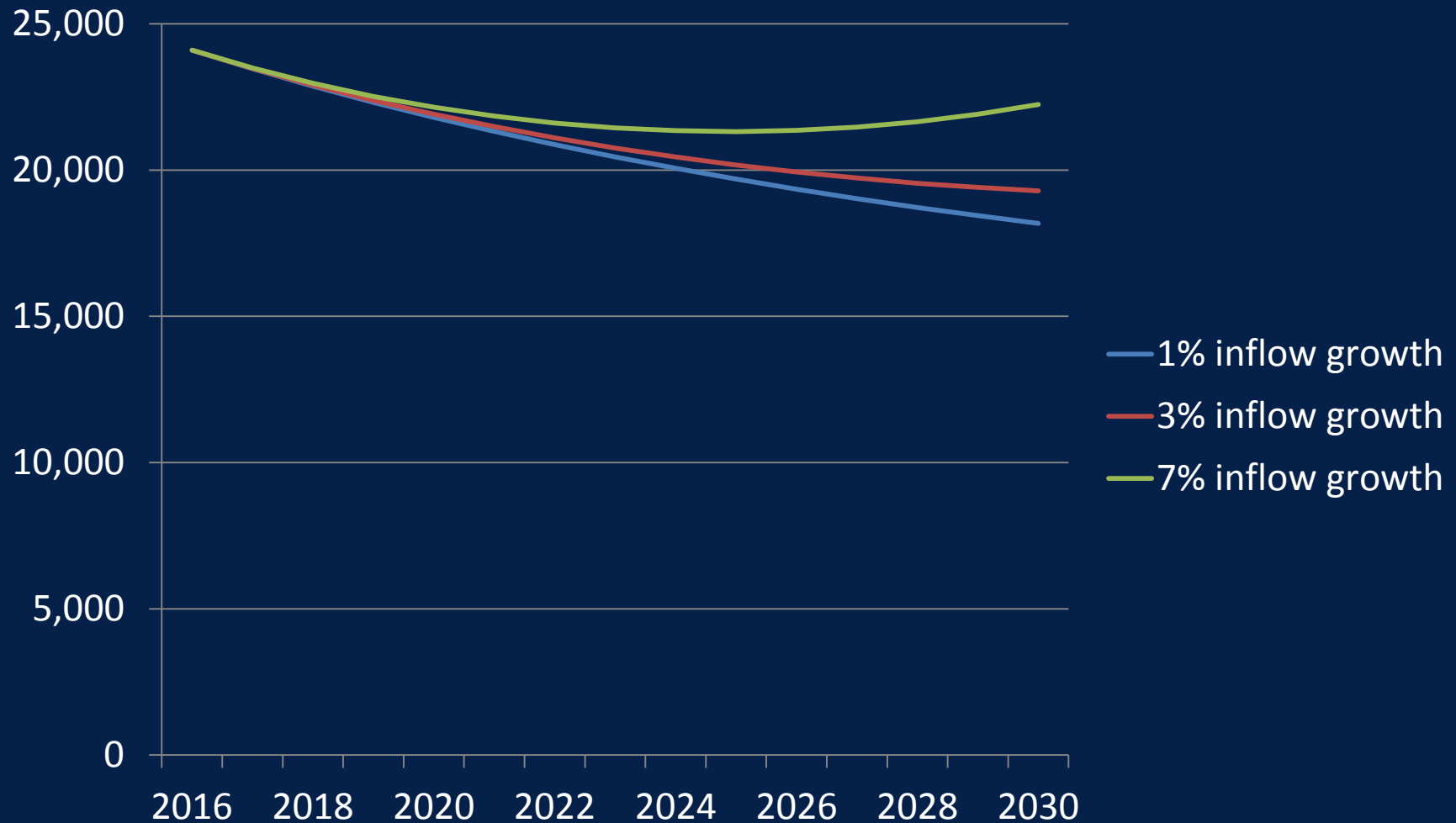


Source: BRN RN Forecasts, 2015

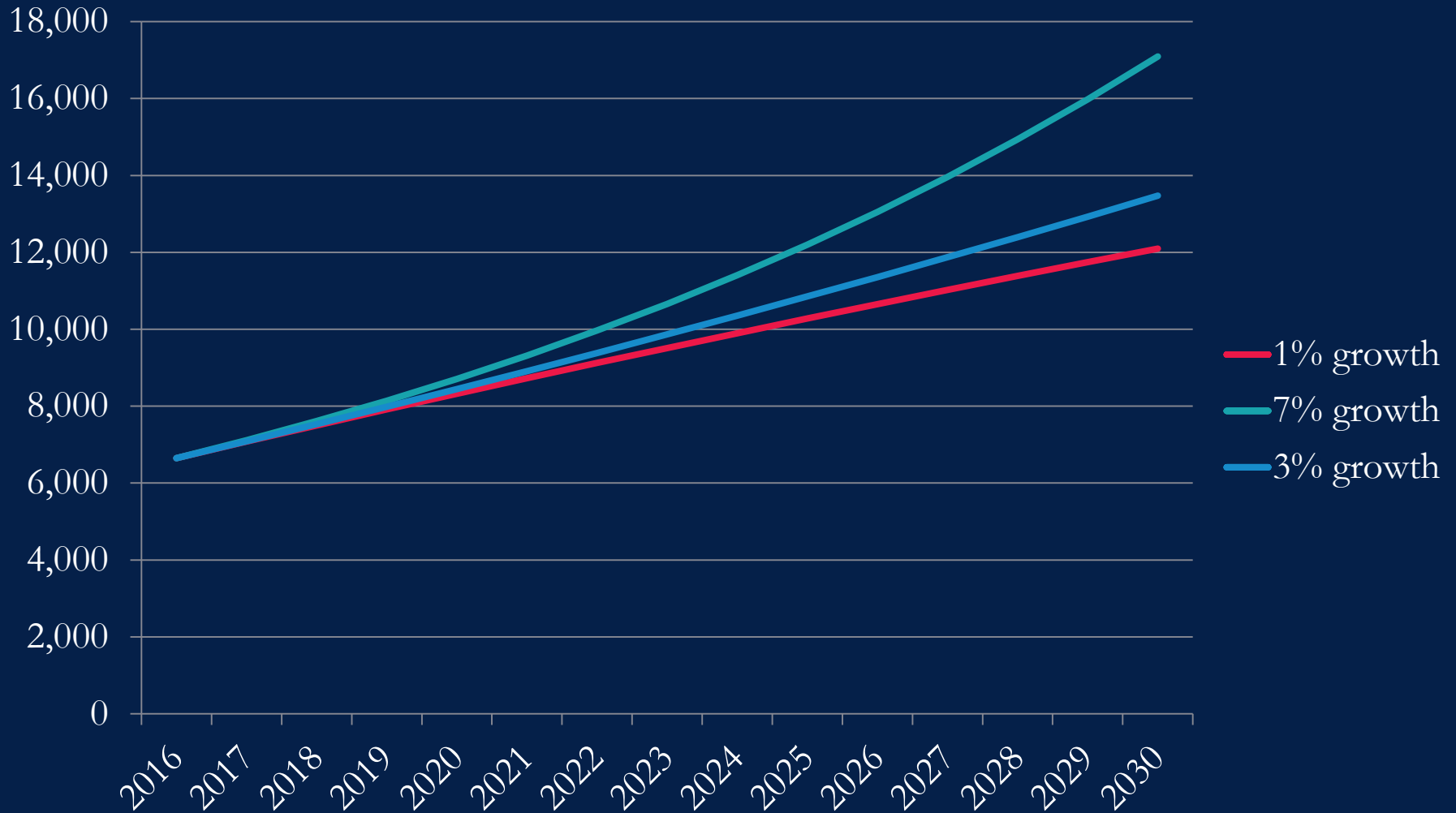
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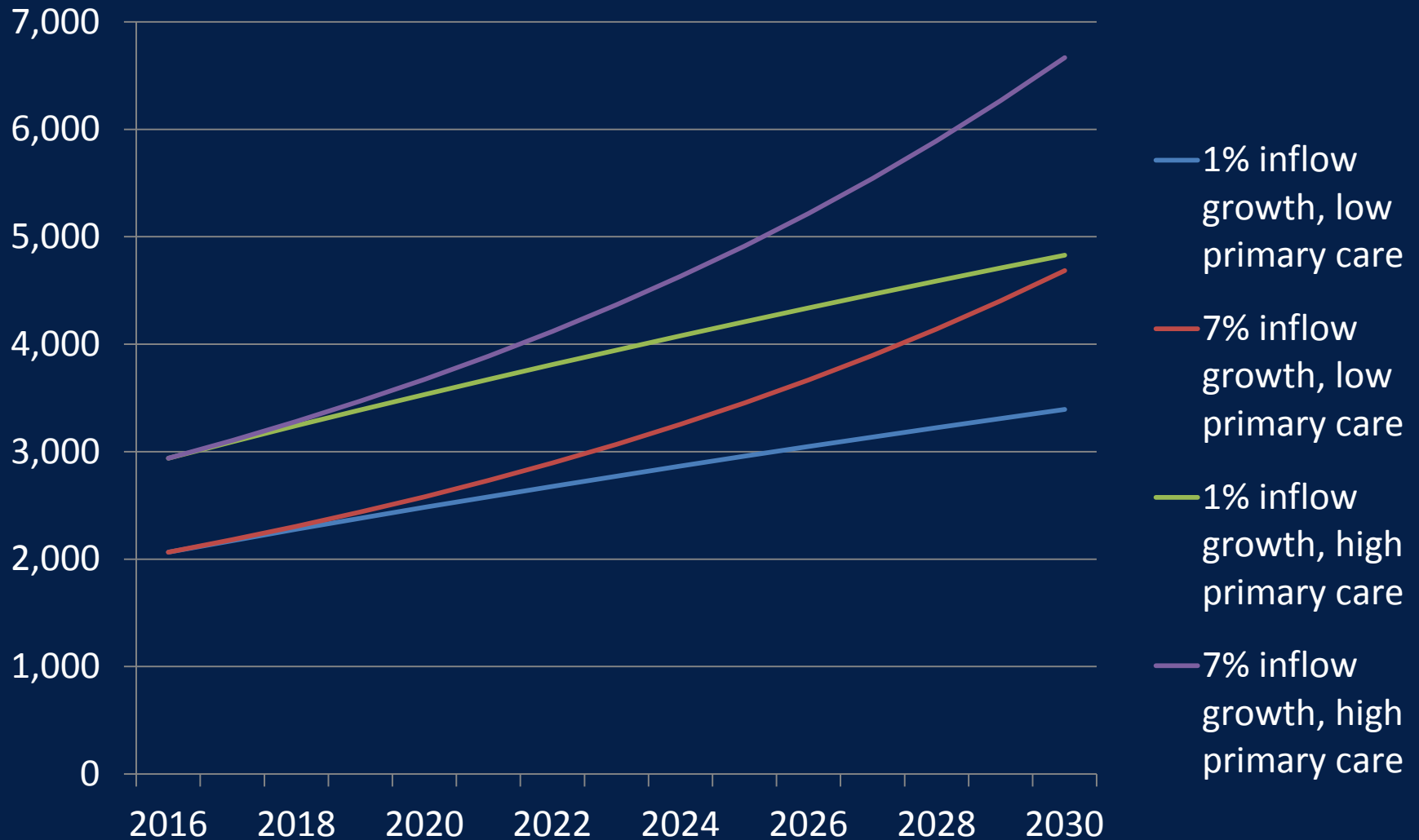
Primary care MD supply forecast (FTEs)



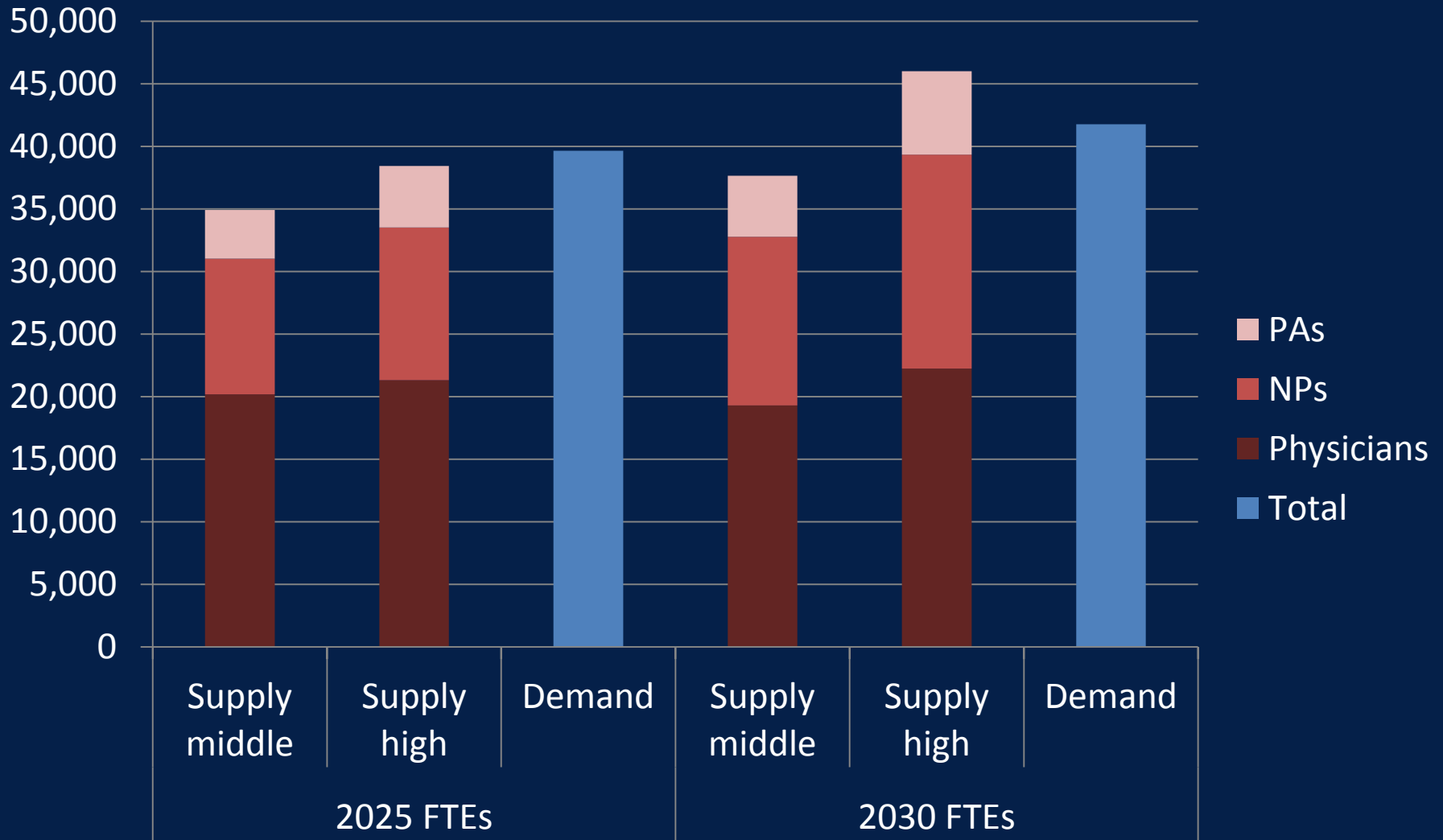
Primary care NP supply forecast (FTEs)



Primary care PA supply forecast (FTEs)



Forecasted Supply and Demand for Primary Care Clinicians FTEs, California, 2025 and 2030



Source: Spetz, Coffman & Geyn, 2017

Primary Care Forecasts, published August 2017

- Demand for full-time equivalent primary care clinicians is expected to increase by 12% to 17% by 2030
- By 2030, California is projected to have either a shortage or a small surplus of primary care clinicians depending on assumptions about
 - Rates of growth in graduates of training programs
 - Percentages of new graduates who provide primary care.
- Supplies of primary care NPs and PAs will increase but supplies of primary care physicians will decrease.
- Shortages are projected to be most severe in the Central Valley & Coast and Southern Border regions

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Solutions for nursing

- Employers: Partner with schools
 - Invest in new graduate hiring
 - Less expensive than a shortage
 - Recruitment costs
 - Costs of patient care lapses
 - Costs of rapid wage increases
 - Invest in transition to practice/residency programs
 - Invest in transition in practice programs
 - Provide clinical faculty
 - Flexible scheduling for RNs pursuing advanced degrees

Solutions for nursing

- Educators: Partner with employers
 - Offer electives in the clinical areas of shortage
 - Ensure streamlined education progression
 - Expand partnerships beyond acute care settings
 - Include employers in education program content discussions

Solutions for nursing

- Policymakers: Maintain education capacity
 - Do not let enrollments drop
 - Support scholarship programs such as the HPEF programs
 - Explore non-traditional clinical placement settings and use of simulation

Solutions for primary care

- Recruit primary care physicians to practice in California
- Expand primary care residency programs, especially in the regions with greatest forecasted shortages
- Improve retention of physicians, particularly those who are younger
- Ensure 3-7% annual growth in graduations from NP and PA education programs
- Expand team-based primary care models that maximize the use of all clinicians
- Support alignment of insurance reimbursement with team-based care
- Ensure that scope-of-practice regulations for NPs and PAs maximize their capacity to provide primary care

Strategies for Expanding Primary Care Capacity



Check out the UCSF website!

<http://rnworkforce.ucsf.edu>

The screenshot shows the homepage of the UCSF RN Workforce website. The top navigation bar is blue with white text for 'University of California, San Francisco', 'About UCSF', 'Search UCSF', and 'UCSF Medical Center'. A search bar is located on the right side of the navigation bar. Below the navigation bar is a white header with the UCSF logo on the left and a menu of links: Home, News, Demand Data, Supply Data, Education Data, Publications, Resources, About Us, and Contact Us. The main content area features a large blue heading 'Welcome to RN Workforce: California's RN Labor Market'. Below this is a 'News' section with two articles. The first article is 'Survey Invitation: Survey of Nurse Employers in CA, 2016' with a post date of November 3, 2016, and a link to the survey. The second article is '2015 Simulation in Nursing Education Survey' with a post date of June 28, 2016, and a brief description. On the right side, there is a grey box containing the 'Our Mission' section, which describes the registered nurse workforce in California and UCSF's role in workforce planning. Below the mission statement is a 'Subscribe to mailing list' section with an email input field.

University of California, San Francisco

About UCSF Search UCSF UCSF Medical Center

Search

Home News Demand Data Supply Data Education Data Publications Resources About Us Contact Us

Welcome to RN Workforce: California's RN Labor Market

News

- **Survey Invitation: Survey of Nurse Employers in CA, 2016**
Post date: November 3, 2016
The 7th annual [Survey of Nurse Employers in California, 2016](#) is now active!
Please access the survey here at: <http://rnworkforce.ucsf.edu/moore2016>
- **2015 Simulation in Nursing Education Survey**
Post date: June 28, 2016
Latest report of recently-graduated California registered nurses (RNs) on their experiences with simulation-based education, and how such education has or has not prepared them for nursing practice.

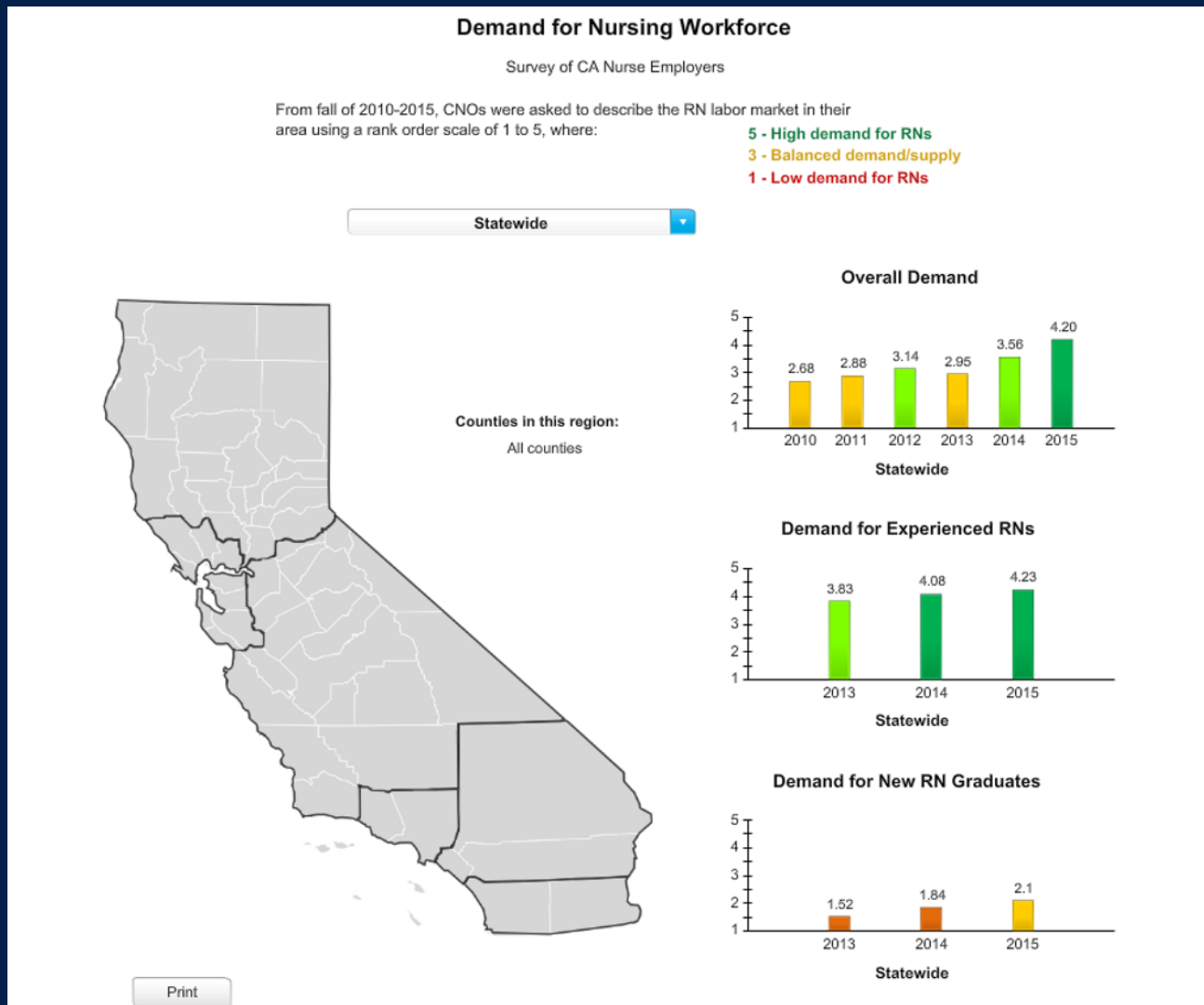
Our Mission

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

Email:

Interactive data displays



Also go to the BRN website

Forms & Publications

The screenshot displays the website for the California Board of Registered Nursing (BRN). The header includes the CA.GOV logo, the BRN logo, and the text "California Board of Registered Nursing". A search bar is located in the top right corner. The main navigation menu consists of: Home, Consumers, Applicants, Licensees, Enforcement, Intervention, Online Services, and a contact icon. The breadcrumb trail shows: Home > Forms & Publications > Reports. The "Reports" section is highlighted in orange and contains a list of links: School Reports, Biennial RN Survey and Forecasting Reports, Other RN-Specific Surveys and Reports, and Sunset Review Reports. Below this is a "School Reports" section with a list of links: 2014-2015 Pre-Licensure Nursing Program Annual School Report: Data Summary and Historical Trend Analysis (with sub-links for Data Summary and Regional Reports), BRN School Report Data, 2005-2006 to 2014-2015, and 2014-2015 Post-Licensure Nursing Program Data Summary and Historical Trend Analysis. On the right side, there is a "Quick Hits" section with a star icon and a list of links: Processing Times, Apply for Licensure, License/Certificate Renewal, Verify a License, Forms & Publications, Military Personnel & Spouses/Domestic Partners, Nursing Practice, Regulations, Nursing Programs & Education, Frequently Asked Questions, Careers in Nursing, and Join Our Email List. Below that is a "Related Links" section with a circular icon and a list of links: Department of Consumer Affairs, National Council of State Boards of Nursing, Health Care Related State Agencies, and Specialty and Advanced Practice Groups.

Questions?

Thoughts?

Ideas?

Perspectives?

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