



**Center for Health Workforce Planning**  
**Issue Brief: In-depth Survey of Nurses Regarding Retirement Issues:**  
**August 15, 2004**

## **Background**

During fall 2003, a survey was conducted by the Center for Health Workforce Planning in partnership with the University of Iowa. The purpose of the study was to gain an understanding of the retirement plans and challenges faced by Iowa's nursing work force. This was a replication of a survey conducted by the Iowa Council of Nurses in 2001. Participants were a random sample of registered nurses (RN) and licensed practical nurses (LPN) ages 51 to 60 years old. As part of the 2003 survey, respondents were asked if they wished to participate in a focus group addressing selected retirement issues in greater depth.

In the summer of 2004, a focus group was conducted via electronic mail using three sets of questions sent two weeks apart. Questions were derived from the findings of the 2003 survey. The first set of questions focused on environmental factors that could be implemented to enhance and prolong employment of nursing personnel. During the second session, participants responded to questions related to wages and benefits. The final set of questions targeted legislative and public policy changes and work place environment issues.

A total of 17 nurses (5 LPNs and 12 RNs) indicated that they would be willing to participate in the e-focus group. On average, 14 persons responded each week. Participants resided in all four quadrants of Iowa with the predominant group (6) indicating residence in the southeastern sector. Seven respondents were between 51 to 55 years old; six were 56 to 60 years old; and one was in the 61 to 65 age group. The specific age of three persons was unknown but ranged from 52 to 61 years old. Four respondents indicated that they plan to retire when they are between 61 and 65 years old and 10 do not plan to retire until they are age 65 or older. Three did not indicate their plan.

## **Responses of the Nursing E-Focus Group**

### **Topic #1: Physical Considerations (14 respondents)**

When responding to this item, the majority commented on time worked by the older employee. Their suggestions for improving the work environment included:

- Having shorter shifts; more flexible hours; half day positions (with benefits)
- Working the same shift all of the time
- Limiting the shift to eight hours and ensuring meal and rest breaks
- Providing adequate staffing ratios

Others suggestions included self-help considerations and physical accommodations that make work easier:

#### **Self-help suggestions**

- Find a position with fewer physical demands
- Take physical care of the self such as proper diet, exercise, weight control
- Obtain help when lifting
- Take time for self and more frequent vacations

- Continue education for self-fulfillment as well as for preparation for positions that are less demanding physically

### **Physical assistance using proper equipment and supplies**

- Ergonomic equipment, especially desks and adjustable chairs, in sufficient quantity to accommodate end-of-shift documentation time
- Patient lifting devices; self-propelled carts and beds
- Computers including computerized charting and bedside online documentation
- Supplies at the patient bedside

When asked what would be required to make these suggestions a reality, the majority believed the employer and supervisor bore the responsibility for knowing the needs of employees and prioritizing funding to implement the purchase of equipment and the training required for proper usage. One person stated, “Human resource departments really need to be educated and learn to accommodate the aging working nurse.” Her comment implied personnel policies should be reviewed in light of an aging nursing work force.

### **Topic #2: Wages and Benefits (15 respondents)**

When asked to what extent salary impacts the decision to continue nursing practice, eight respondents said that salary had a major impact on their decision to continue work. Two stated that it had some impact and one said that the impact was slight. Several stated that the nursing salaries in Iowa are low and not reflective of the amount of nurse responsibility. Three said that, in addition to salary, personal satisfaction with the job kept them in nursing practice.

Benefits were very important to respondents. All types of benefits were of great consequence with health insurance and retirement benefits mentioned most frequently. Several emphasized the need for benefits for part-time employees. More vacation time and shorter work shifts were listed as important to the mature worker.

In the 2003 survey, as well as in a survey of long-term care employers (2003), it was apparent that many health-care workers have no benefit packages at their place of employment. In the current survey, when asked what suggestions respondents had for obtaining benefits, there was an array of answers:

- Contact the American Association of Retired Persons (AARP) concerning benefits offered
- Contact insurance companies to directly seek a specific benefit
- Keep asking employers for benefits
- Work through professional organizations for coverage
- Use financial institutions to start a personal 401K or a Roth IRA
- Form a group of interested employees and seek an insurer to cover the group

One nurse stated, “There needs to be health-care coverage at some kind of group rate for older RNs who can work in a limited fashion – less than at 50 percent. It may cost the individual more than other employees but would encourage staff to remain in the workplace even less than half-time.”

### **Topic #3: Legislation, Public Policy, Work Place Environment (14 respondents)**

In the 2003 Retirement Survey, many respondents said rules and regulations are burdensome. In the current survey, respondents were asked what legislative and public policy changes are needed

to improve the workplace climate for older nurses. A number of suggestions were offered:

- Greater ease in acquiring an Iowa nursing license when transferring from out of state
- Greater unionization of nurses
- State inspections focusing on what can be done to correct problems with less emphasis on fines and fault finding

### **Legislation**

- Increase Iowa's Medicare and Medicaid reimbursement
- Institute universal health insurance and a universal charting system
- Prohibit mandatory overtime
- Limit the length of the workday
- Require ergonomic equipment
- Require adequate amounts of equipment
- Require mandatory health insurance and pensions in health facilities
- Require mandatory nurse/patient ratios
- Strengthen age discrimination and Good Samaritan laws
- Give a tax break to those who continue to work after age 65
- Change employment-at-will provisions to better protect employees
- Institute loan forgiveness programs for nurses who work where there is a nursing shortage

### **Public Policy**

- More education about health in schools
- More exercise in schools
- Outlaw pop machines or sale of pop and other junk food in schools
- Require large chain restaurants to list the calories, fat, carbohydrate and salt content of their menu items
- Institute smoke-free legislation in most public buildings
- Support breast feeding in suitable places including the work site

In the 2003 survey, at least 15 percent of respondents shared positive experiences about their work experience and many said that a positive work environment is vital to their continued employment. Current survey respondents were asked what specific things could be done to keep the work place positive. Suggestions included:

- Ensure a well rested staff (adequate time off, adequate staffing, lighten workload for older nurses, provide extra help when patient acuity is greater, consistent work shifts)
- Hire the right people into the right jobs; encourage and model teamwork
- Show respect for the older employee; give more recognition for their experience
- Hire competent, educated staff. Orient them and hold them accountable for their work
- Promote openness to change on the part of the employer and employee
- Provide free mental health counseling to staff
- Reinforce a positive attitude
- Give recognition for "going the extra mile"

## **Summary Recommendations of the Nursing Retirement Survey E-Focus Group**

### **Improve working conditions**

Institute working conditions that enhance the worker's ability to provide direct client care. Limit work shifts to eight hours or less. Provide meal and rest breaks. Ensure adequate staffing. Eliminate mandatory overtime. Schedule workers for the same shift consistently.

### **Provide equipment and supplies**

Purchase ergonomic equipment to assist the older worker to minimize injuries to themselves and their clients. Provide equipment in sufficient quantity to accommodate staff needs and provide training on the use of new equipment. Locate supplies conveniently to limit the amount of time workers must be on their feet.

### **Improve nursing wages and benefits**

Ensure that Medicare/Medicaid reimbursement for Iowa health facilities is comparable to other states and use the money to increase nurses' salaries. Institute minimum benefits, especially retirement benefits, for health-care workers. For facilities that do not offer benefits, form a state-sponsored benefit program to which all health workers could subscribe.

### **Institute state and federal legislative changes and public policies that improve the work environment of the older worker**

Institute legislation that limits the length of the workday, prohibits mandatory overtime, and establishes mandatory nurse/patient staffing ratios. Establish parity for Medicare/Medicaid reimbursement in Iowa. Support universal health insurance and a universal charting system. Establish loan forgiveness programs for nurses who work where there is a designated shortage. Provide a tax break to those who continue to work after age 65. Strengthen legislation concerning employment-at will provisions, age discrimination laws, and Good Samaritan laws. Require ergonomic equipment in the work place. Mandate that benefit programs be available at all health facilities in Iowa. Establish a statewide benefit program for health workers when facilities cannot offer their own.

### **Reinforce a positive work environment**

Show respect for the older employee; recognize for their experience and knowledge. Provide recognition for extra effort. Reinforce a positive attitude among employees. Hire competent workers and hold them accountable for their work. Ensure a well-rested work force by providing adequate staffing and sufficient time off.

*The Center for Health Workforce Planning was created in the Iowa Department of Public Health, Bureau of Health Care Access, to assess and forecast health workforce supply and demand, address barriers to recruitment and retention, support strategies developed at the local level that prevent shortages, and engage in activities that assure a competent, diverse health workforce in Iowa. Funding for the center, fueled through the efforts of U.S. Senator Tom Harkin, is administered through the Bureau of Health Professions, Health Resources and Services Administration, U.S. Department of Health and Human Services.*

[http://www.idph.state.ia.us/hpcdp/workforce\\_planning.asp](http://www.idph.state.ia.us/hpcdp/workforce_planning.asp)

## **References**

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