



Survey of Nurse Employers in California

Second Quarter, 2011

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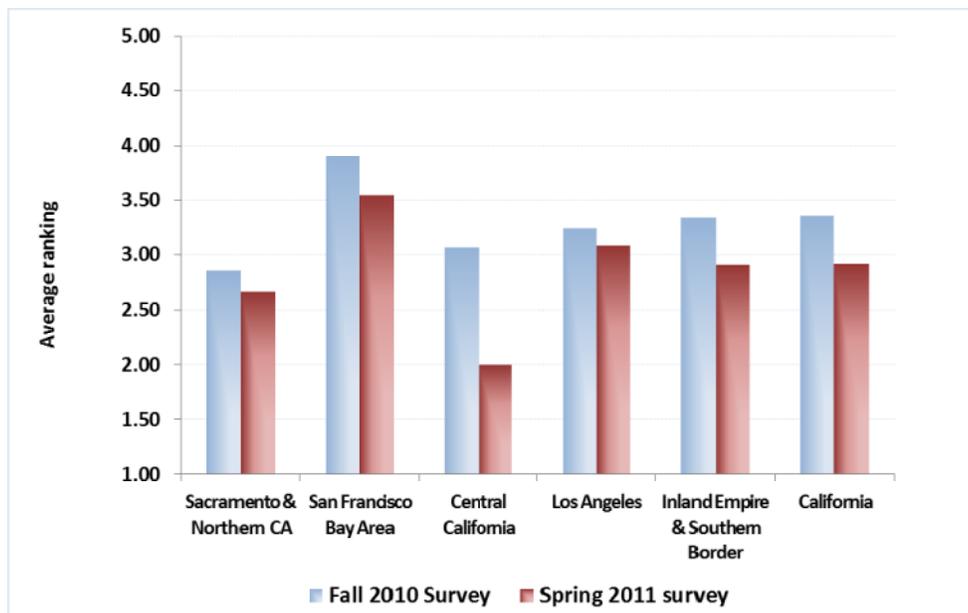
This report summarizes the findings of a survey conducted in spring 2011 of general acute care hospital employers of registered nurses (RNs) in California, to evaluate the overall demand for RNs in the state. The survey reveals variation in the demand for RNs across California, the lack of positions available for newly graduated RNs, and hospitals' expectation that hiring will increase over the next two years.

FINDINGS

Perception of Labor Market Conditions

Hospitals were asked to describe the RN labor market in their area using a rank order scale of 1 to 5, where 1 indicated high demand for RNs and difficulty filling open positions, 3 indicated demand and supply were in balance, and 5 indicated the demand for RNs was much less than the available supply. Figure 1 shows the average ranking of labor market conditions for registered nurses, by region, and for the state as a whole. It compares data collected by this quarterly survey with data collected in fall 2010. Figure 2 shows the differences in demand for RNs based on whether the hospital is located in a rural or an urban area.¹

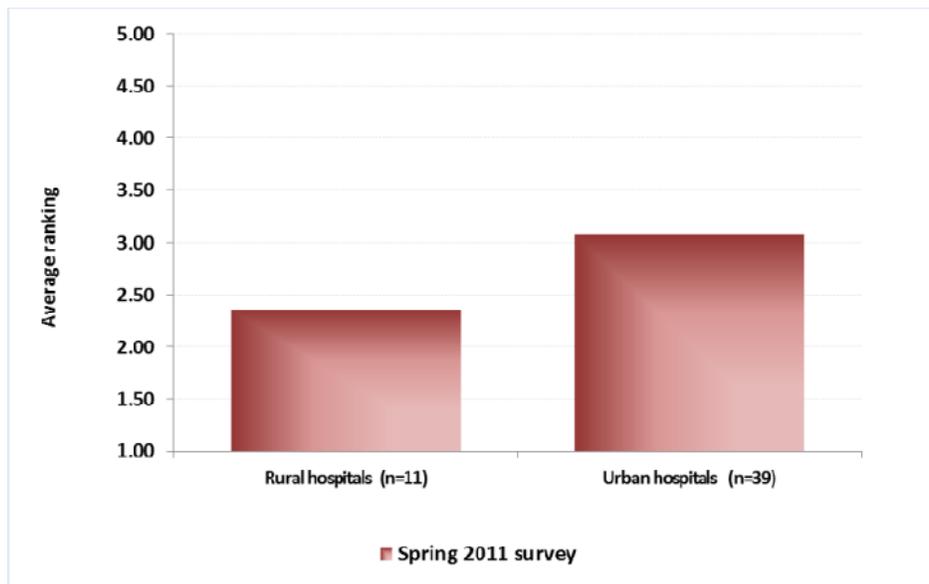
Figure 1. Average ranking of labor market demand by geographic region.
(Lower values indicate greater demand compared with supply.)



- The demand for RNs may be strengthening relative to their supply across the state.
- The average ranking of labor markets statewide is 2.92 in spring 2011, compared to a fall 2010 average ranking of 3.36.
- Demand is strongest among hospitals in the Central Valley region and weakest among hospitals in the Bay Area region.

¹ The regional and rural/urban definitions used in this analysis are provided in the Methods section at the end of this report.

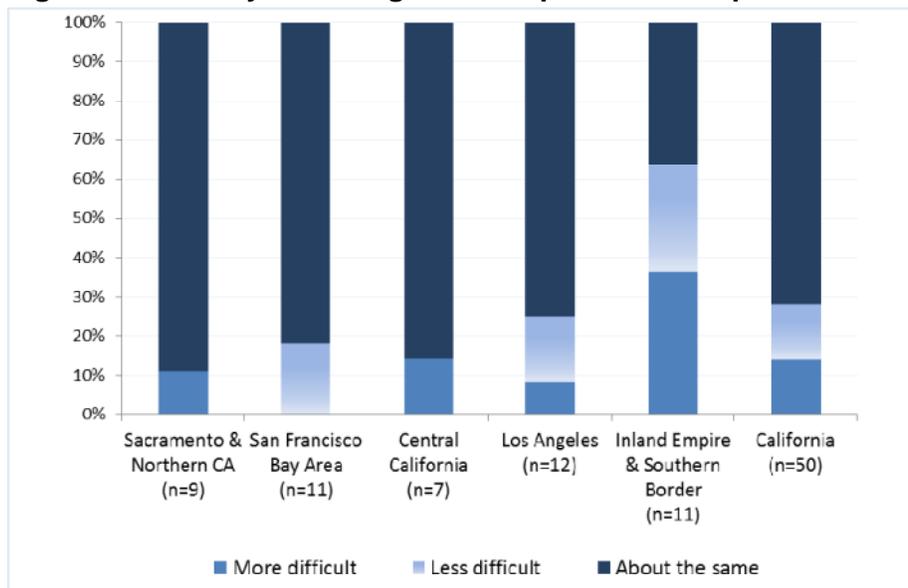
Figure 2. Average ranking of labor market demand by rural versus urban location. (Lower values indicate greater demand compared with supply.)



- Demand for RNs is stronger among hospitals located in rural parts of the state by comparison with hospitals located in urban areas.

Hospitals were asked whether the recruiting of RNs was currently “more difficult”, “about the same”, or “less difficult” than it was last quarter. Figure 3 below shows the distribution of hospital responses, by region and for the state as a whole.

Figure 3. Difficulty recruiting RNs compared to last quarter



- Most hospitals reported that recruiting RNs is currently no more or less difficult than it was last quarter, excepting hospitals in the Inland Empire & Southern Border region.
- Approximately 37% of hospitals in the Inland Empire & Southern Border region reported that recruiting RNs has become more difficult by comparison with last quarter.

Current Employment of Nurses

Hospitals were asked to report the number of budgeted and currently filled Staff RN positions, the number of total vacant Staff RN positions, and the number of vacancies for which they were actively recruiting.

Table 1. Number of currently staffed positions, by full-time/part-time status

Staff RNs	Current positions	# of responses
Full-time	7,942	31
Part-time	2,274	31
Total	14,520	39

- The hospitals that responded to this survey reported a total of 14,520 currently filled Staff RN positions.
- Full-time Staff RN positions accounted for approximately 78% of positions at hospitals that reported full-time/part-time staffing data.

Table 2 provides the number of full-time positions, number of part-time positions, and total number of positions, for hospitals that reported data for budgeted and currently filled positions for each data item.

Table 2. Share of budgeted positions currently filled, by full-time/part-time status

Staff RNs	Current positions	Budgeted positions	% Filled	# of responses
Full-time	7,542	7,876	95.8	30
Part-time	2,116	2,241	94.4	28
Total	13,744	14,421	95.3	39

- Hospitals reported that 95.3% of all budgeted Staff RN positions are currently filled; this is slightly lower than in fall 2010, when 97.3% of all budgeted Staff RN positions were filled.
- A greater share of budgeted full-time Staff RN positions is filled than part-time Staff RN positions.

Table 3 reports the number of full-time positions, number of part-time positions, and total number of positions, for hospitals that reported data for budgeted positions and current vacancies for each data item.

Table 3. Reported vacancies as a share of budgeted positions, by full-time/part-time status

Staff RNs	Vacant positions	Budgeted positions	Vacancy %	# of responses
Full-time	324	7,679	4.2	27
Part-time	130	2,025	6.4	28
Total	776	14,520	5.3	39

- Hospitals reported an overall vacancy rate of 5.3% for budgeted Staff RN positions; this is higher than in fall 2010, when there was an overall vacancy rate of 4.4% for budgeted Staff RN positions.
- The vacancy rate for budgeted full-time Staff RN positions is lower than the vacancy rate for budgeted part-time Staff RN positions.

Table 4 reports the number of full-time positions, number of part-time positions, and total number of positions, for hospitals that reported data for both current vacancies and number of vacancies being actively recruited for each data item.

Table 4. Active recruitment for currently vacant positions, by full-time/part-time status

Staff RNs	Vacant positions	Actively recruited positions	Active vacancy %	# of responses
Full-time	373	348	93.3	30
Part-time	158	113	71.5	30
Total	816	615	75.4	41

- Overall, hospitals reported that they are actively recruiting to fill approximately 75% of all vacant Staff RN positions.
- Vacant full-time Staff RN positions are much more likely to be actively recruited than part-time positions.

New RN Hiring

Hospitals were asked to report the total number of new RNs hired in the last quarter, including the number of foreign-trained and RNs and the number of new RN graduates (US-trained). All 50 survey respondents reported hiring at least 1 new RN in the past quarter. One hospital reported hiring a total of 8 RNs in the past quarter that had been educated outside the United States.

Table 5. Reported new employees as a share of current staff

Position title	New employees	Current staff	New employee %	# of responses
Staff RN	827	13,875	6.0	40

- New Staff RNs hired in the past quarter represent 6% of the current number of Staff RN positions at responding hospitals

Table 6. Hiring of newly graduated registered nurses

Region	New RN graduates	Total new employees	New RN graduate %	# of responses
San Francisco Bay Area	28	156	17.9	11
Central California	45	132	34.1	7
Sacramento & Northern California	27	131	20.6	9
Los Angeles	200	379	52.8	12
Inland Empire & Southern Border	77	253	30.4	11
California	377	1,051	35.9	50
Rural hospitals	45	102	44.2	11
Urban hospitals	332	949	35.0	39

- Approximately 36% of the RNs hired in the past quarter were new graduates.
- New graduates represented over 50% of RNs hired in the past quarter by hospitals in the Los Angeles region, but just 18% of RNs hired by hospitals in the Bay Area region.
- New graduates represented a greater share of RNs hired in the past quarter among hospitals based in a rural location compared with hospitals based in an urban location.

Use of Traveler (Contract) RNs

Hospitals were asked to report the number of traveler (contract) RNs currently being used. Table 7 compares the share of all current RN positions represented by traveler RNs reported during the Fall 2010 survey with the share reported in the Spring 2011 survey.

Table 7. Reported traveler RN staff as a share of current RN staff

Description	Traveler RN positions	Current RN positions	Traveler %	# of responses
Fall 2010 survey	871	55,319	1.6	84
Spring 2011 survey	394	13,785	2.9	40

- The share of all current RN positions held by traveler RN staff has increased from 1.6% to 2.9% between fall 2010 and spring 2011.

Expectations for New Employee Hiring

Hospitals were asked to report on expectations for new employee hiring in the next quarter. Table 8 compares the number of new employees hired in the current quarter with the reported, expected number of new hires in the upcoming quarter.

Table 8. Expected new employee hiring

Region	New hires (current quarter)	Expected hires (next quarter)	Change %	# of responses
San Francisco Bay Area	156	137	-12.2	11
Central California	132	127	-3.8	7
Sacramento & Northern California	131	106	-19.1	9
Los Angeles	379	262	-30.9	12
Inland Empire & Southern Border	236	218	-7.6	10
California	1,034	850	-17.8	49

- Hospitals reported an approximately 18% decline in the number of new employees they expect hire in the upcoming quarter, compared to hiring in the current quarter.
- Expectations for new employee hiring in the upcoming quarter are weakest among hospitals in the Los Angeles region.

SURVEY METHODS

The survey instrument was based on the questionnaire developed by the California Institute for Nursing and Health Care (CINHC) for the 2009 New RN Hospital Survey, and was designed to match the survey conducted in fall 2010 by UCSF, CINHC and the Hospital Association of Southern California (HASC). Chief Nursing Officers were invited by email to participate in this web-based survey. Respondents who requested an alternative to completing the survey online were emailed or faxed a hard copy version of the survey. Facilities were contacted with follow-up emails and telephone calls in an effort to encourage participation.

Survey Participation and Data Analysis

A total of 50 responses to the survey were received. One survey respondent reported data for three hospital facilities. The survey responses represent 52 different hospital facilities and 11,859 total beds, which is approximately 14% of the total number of beds at general acute care hospitals in California.

Some tables/figures in the report focus on differences across hospitals based on whether the hospital is located in a rural or urban setting. We used a hospital's zip code to classify it as either rural or urban based on the rural-urban taxonomy defined by the Rural-Urban Commuting Area (RUCA) classification scheme.²

Some tables/figures in the report focus on differences across hospitals by region; the multi-hospital data were reported for facilities that were all within the same region. The geographic regions used to group survey responses are based on those used to conduct the California Board of Registered Nursing, Survey of Registered Nurses. However, due to the small number of survey responses for certain parts of the state, regions were further combined. Table 9 lists the regions used in this report and the counties each represents.

Table 9. Geographic regions and the counties they represent

Region	Counties represented
Sacramento & Northern California	Butte, Colusa, Del Norte, Glenn, Humboldt, Lake, Lassen, Mendocino, Modoc, Nevada, Plumas, Shasta, Siskiyou, Sierra, Tehama, Trinity, El Dorado, Placer, Sacramento, Sutter, Yolo, Yuba
San Francisco Bay Area	Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Santa Cruz, Solano, Sonoma
Central California	Alpine, Amador, Calaveras, Fresno, Inyo, Kern, Kings, Madera, Mariposa, Merced, Mono, San Joaquin, Stanislaus, Tulare, Tuolumne, Monterey, San Benito, San Luis Obispo, Santa Barbara
Los Angeles	Los Angeles, Orange, Ventura
Inland Empire & Southern Border	Riverside, San Bernardino, Imperial, San Diego

Table 10 compares the distribution of hospitals that responded to the survey with the distribution of general acute hospitals in California, across the geographic regions used in this report. The regional distribution of survey respondents exhibits some difference relative to the distribution of general acute

² For more information on RUCA codes: <http://depts.washington.edu/uwruca/index.php>

care hospitals across the state. The regions where this is most evident are the Los Angeles region, where hospitals are underrepresented among survey respondents and the Inland Empire & Southern Border region, where hospitals are overrepresented.

Table 10. Distribution of responding hospitals vs. general acute care hospitals in California, by region

Region	General acute care hospitals in California		Survey sample	
	#	%	#	%
San Francisco Bay Area	88	20.1	11	22.0
Central California	75	17.2	7	14.0
Sacramento & Northern California	58	13.3	9	18.0
Los Angeles	150	34.3	12	24.0
Inland Empire & Southern Border	66	15.1	11	22.0
Total	437	100	50	100