

OVERVIEW OF CASE STUDY FINDINGS AND BEST PRACTICES

We conducted in-depth case studies of healthcare and non-healthcare organizations that have been publicly recognized for achieving high levels of success in retaining experienced RNs and other mature workers. A common message emerging from these organizations for policy makers and hospitals and health systems is that *there is no single silver bullet that alone will significantly improve the retention of experienced RNs or other mature workers*. Put another way, achieving and sustaining success is dependent on far more than individual programs or changes to the workplace environment.

The research team concluded that success in retaining experienced staff relies on doing a number of things particularly well and building on a strong foundation of supportive organization-wide success factors that include:

1. Leadership committed to building and sustaining a corporate culture that values nursing and experienced workers.
2. A structured and organization-wide focus on managing and developing talent, supported by aligning benefits and making the business case to support retention objectives.

These foundational success factors are supported at top-performing organizations by a rigorous and on-going focus on metrics to rapidly identify and address retention issues and to measure and evaluate performance against clearly defined objectives. Each overarching success factor is also supported by a wide variety of often innovative programs and initiatives described in the case studies below. For example, organizations successful in managing and developing talent internally offer such targeted benefits as:

- Phased retirement options
- Flexible work scheduling options
- Eldercare benefits
- Transfers from bedside nursing to clinical mentoring roles
- Gain-sharing based upon exceeding patient satisfaction and financial performance targets
- Education, including BSN and MSN degree opportunities
- Comprehensive wellness programs

The remainder of this overview highlights for each success factor a number of illustrative programs and initiatives we discovered during our visits to top-performing organizations. It concludes with their advice about how to transfer these and other successful retention practices to other settings.

Leadership Committed to a Corporate Culture Valuing Experienced Workers

The factors motivating **Bon Secours health system** in Richmond, Virginia, to make retention of experienced RNs a strategic priority are deeply rooted in the history of the organization, which

was originally founded in 1824 by the Catholic "Sisters of Bon Secours" in France. "We Believe Bon Secours Is a Place to Work for Life" formalizes the culture of honoring age and experience that, while present in some organizations, is absent in many others.

As detailed in the case study below, the health system brings this culture to life by blending flexible work and retirement arrangements, innovative work-life benefits, education, and development and strong internal communications to create an environment that celebrates the value seasoned workers bring.

Bon Secours also deploys a multi-layered approach to track metrics and outcomes supporting the business case for its recruitment and retention strategies. The CEO and his management team assess impact broadly through a dashboard of performance measures that portray the organization's strength and competitive position in the market. Examples include:

- Trends in patient satisfaction (currently scoring in the 68th percentile)
- Trends in quality outcomes (currently scoring in the 95th percentile)
- Trends in financial performance (currently in robust financial health)
- Community commitment (focus on community outreach)
- Marquee medical staff (secured from top institutions)
- Employee engagement/turnover (engagement levels rising and turnover falling, as reported by ongoing Gallup surveys and internal analyses)

Because retaining mature RNs and other experienced workers is mission critical at Bon Secours, on a more granular level, its Human Resources Division also actively monitors a scorecard of performance indicators at the departmental level on a weekly, bi-weekly and/or monthly basis. Data collection methods include employee satisfaction surveys and employee and manager focus group feedback.

Monongalia General Hospital in Morgantown, West Virginia, epitomizes another variation on the theme of corporate culture supporting experienced RN retention. To stand out from the local competition, Monongalia focuses on strengthening its internal culture and the quality of care it provides to patients. Nurses there point to several factors that support a strong culture of nursing. These include a greater focus on nurse empowerment compared to many teaching hospitals where physicians may enjoy a higher profile and nurses may be less prominent and empowered.

For example, in contrast to the traditional facility design process, hospital leadership actively involved experienced nurses in designing a new \$92 million "state of the art" patient tower that opened in 2008. Nurses played active roles from the beginning in facility master planning, including room and floor design and equipment selection. As a result, the new tower includes a number of ergonomic design features that enhance patient care and nursing staff satisfaction. Many experienced RNs cited this level of empowerment as unprecedented in their careers and praised the inclusiveness of hospital leadership.

Established in 1864, **First Horizon National Corporation** (FHN) headquartered in Memphis, Tennessee, is one of the top 30 bank holding companies in the U.S. In the early 1990's, FHN's leadership discovered that their most profitable retail branches also enjoyed the highest levels of employee satisfaction and retention. With the business case that employee retention is directly linked to higher profitability, FHN established "FirstPower Culture," an initiative explicitly designed to realign corporate priorities to put employees first in the organization's value chain. A FirstPower Council was established to help identify, lead and manage corporate-wide initiatives to fully embrace the new culture.

By 2003, FHN's First power culture had evolved from its original focus on empowerment and continuous improvement in the workplace to also highlight ownership, teamwork and inclusiveness. This meant breaking down organizational hierarchies to empower employees to freely voice their ideas regardless of formal position, and providing all with the opportunity to be high-performing team members with chances to grow and succeed. The forum to do so was provided by restructuring the FirstPower Council. Previously, the Council was composed entirely of executive leaders. With the re-structuring, only three executives remain, with the remaining members being frontline employees.

FirstPower Culture continues to be a key driver in retaining FHN's employees and will continue to evolve consistent with the positive return on investment it continues to demonstrate. According to one experienced employee, FirstPower "*makes you feel that the company wants and values you. Not many companies make you feel that way and that's why I've been with the company for so long.*"

Organization-wide Focus on Managing and Developing Talent

Scripps Health, in San Diego, California, develops recruitment and retention programs to inform an annually updated system-wide workforce strategic plan, which is an integral component of the healthcare system's overall strategic plan. The workforce plan includes a detailed five-year forecast of Scripps' talent needs based upon analyzing retention and retirement trends and projected health system areas of growth. Scripps uses this information to identify business units where talent loss may be a threat. Retention strategies such as flexible work arrangements and phased retirement options are then developed and rolled-out where needed.

Benefit programs at Scripps are designed to retain experienced RNs and other mature workers longer in the workplace as part of a "life cycle" process that systematically manages the system's talent through five career stages:

1. Entering the workforce;
2. Growing with your family;
3. In the middle of everything;
4. Thinking about retirement; and
5. Retirement.

From "Wisdom at Work: Retaining Experienced RNs and Their Knowledge Case Studies"

Of particular interest for workers of all ages is the ability to choose from a large variety of programs that support their specific needs, such as education and growth, gain-sharing, caring for parents, planning for the future, and phased retirement.

While Scripps continues to use traditional sources, such as print advertising and websites to attract new talent, the organization's focus has shifted to optimizing retention by developing its staff internally and placing each staff member in the best position for his/her professional success and that of the organization. As noted by a Scripps senior executive, *"We recognize the life cycle of each employee-whether they are early career, mid-career or late career- and help them grow within Scripps and find a career that fits their specific needs."*

Carondelet Health Network, in Tucson, Arizona, has adopted a different approach to differentiate itself to retain nursing talent. Responding to heavy competition for nurses from nearby Phoenix and southern California, leadership stresses education and dedication to the development and retention of nurses by operating an on-site BSN program and collaborating with a local university to offer an on-site MSN program.

The business case for investing in the BSN program was made when the organization realized that the projected \$10,000 per nurse cost of the program would be more than offset by savings from reducing the approximately \$20 million a year spent on contract labor services through improved retention of staff nurses, something that Carondelet was committed to doing.

The business case for an MSN program was harder to justify to leadership and the Board given its \$27,500 per nurse price tag. However, the Tucson area, like other parts of the country, was facing a nurse faculty shortage at the same time that the Governor of Arizona had just passed legislation mandating all nursing schools to double their enrollment.

Recognizing an opportunity, Carondelet signed an exclusive contract with Grand Canyon University under which the college offered nurses an MSN program, in return for the nurses agreeing to serve as adjunct faculty upon graduation. In 2006, Carondelet began offering the MSN program, another step towards emphasizing a culture of education, critical thinking, and better patient care.

An important outcome of being the only healthcare system in the state of Arizona offering free, on-site BSN and MSN programs for its nurses has been a positive impact on the recruitment and retention of nurses at Carondelet. Since 2004, when Carondelet prioritized RN recruitment and retention initiatives, the percentage of staff nurses has increased from 81.7% to 89.2%, while the percentage of contract nurses has declined from 18.3% to 10.8%. As noted by a telemetry nurse, the education programs have given him *"direction, goals, an opportunity, and a career pathway. How could I leave Carondelet after they have given me this opportunity?"*

While proud of their accomplishments and external recognition, these "best practice" organizations believe that their success in retaining mature RNs and other workers is transferable to other organizations. As summed up by one Human Resource executive, *"any organization can start down this path. It's all about figuring out what you can do with the resources you have, having faith in your own abilities and a drive to achieve something."* Other practical advice offered by these high-performing organizations includes:

From "Wisdom at Work: Retaining Experienced RNs and Their Knowledge Case Studies"

- Prioritize structured workforce planning by making it a part of the organization's strategic plan.
- Develop a business case for retention. To be sure that hospital leadership sees the benefit of proposed retention programs and understands that sometimes you have to spend money to save money, it's important to demonstrate the return on investment of proposed investments.
- Be data driven in identifying staff retention risks and needs. That includes disciplined tracking of metrics and speaking directly with mature workers to understand their issues and needs. For example, at Bon Secours, results of annual Gallup employee engagement surveys are taken very seriously, as history has shown that departments with low survey results often suffer high turnover.
- Keep an open mind about retention strategies as workforce demographics and the organization's business strategy change.

Lastly, organizations should avoid the temptation of resorting to quick fixes. Workforce planning is not just about designing and implementing specific programs and initiatives. It's about investing in both tangible and intangible improvements to enhance the entire system. Nursing should be a long-term investment for any hospital or health system, and an organization's recruitment and retention efforts should reflect that.