



Florida's Registered Nurse Supply: 2014-2015 Workforce Characteristics and Trends

May 2016



Addressing Nurse Workforce Issues for the Health of Florida

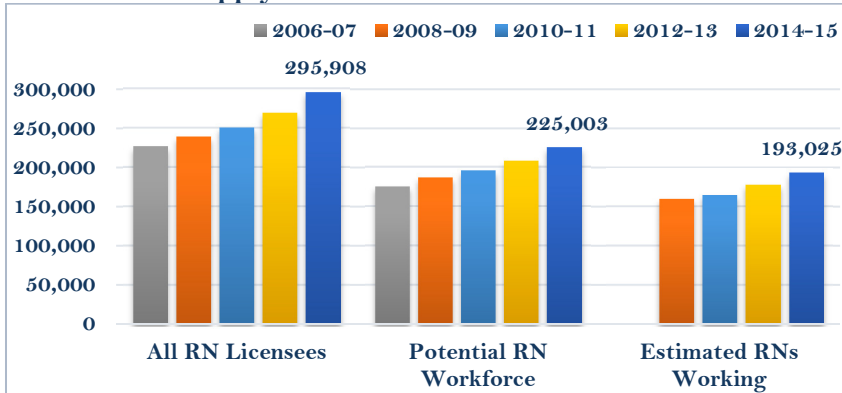
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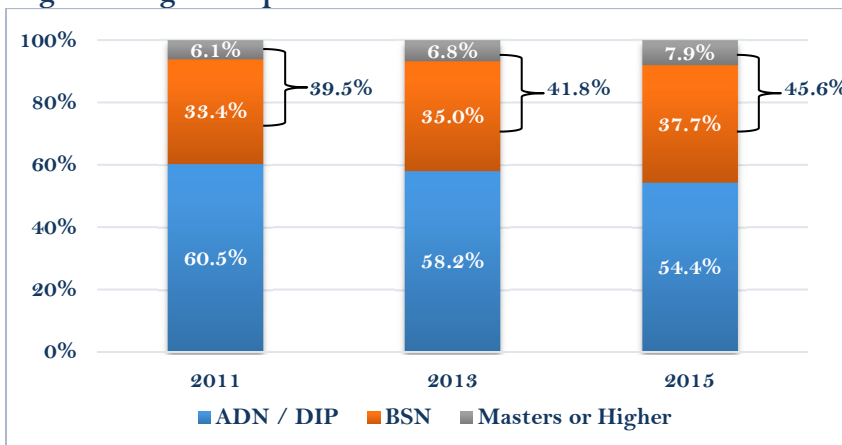
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The information below represents the **key findings** on Registered Nurse (RN) supply and workforce in Florida. Trend analysis is provided for 2007 through 2015 when available.

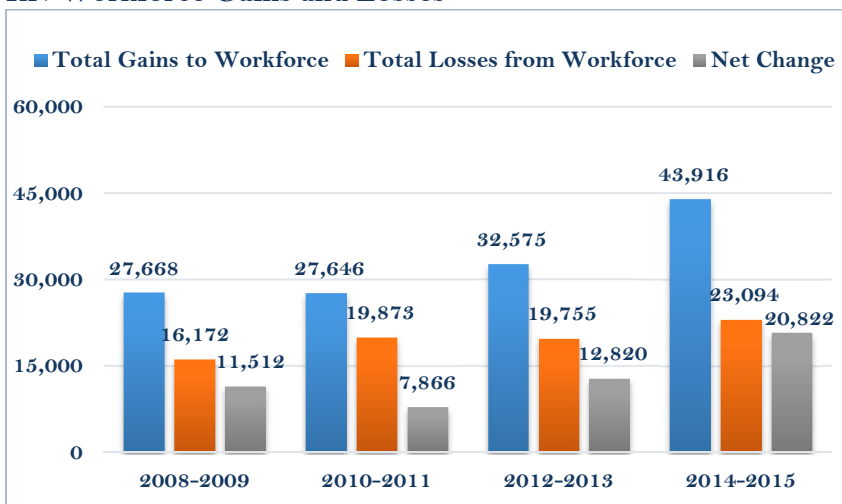
Florida's RN Supply Trend



Highest Degree Reported



RN Workforce Gains and Losses



- Florida's potential RN workforce **gained** nearly 21,000 nurses from 2012-13 to 2014-15, most are new RN graduates.
- 86% of RNs are **working in nursing**.
- The **top five** employment settings for RNs are hospitals (63.5%), home health (6.4%), long-term care (4.8%), ambulatory care (4.4) and hospices (3.2%).
- The two most **common occupational titles** for RNs are staff nurse (67.6%) and nurse manager (8.4%).
- The percentage of working RNs with a **baccalaureate in nursing** or higher is increasing, going from 39.5% in 2011 to 45.6% in 2015.
- Almost 17% of working RNs are over age 61, and 27% are age 51-60. This group can be expected to **phase out** of the workforce through retirement within 5 to 10 years.
- **Retirement** of FL's aging nurse workforce will result in the loss of highly skilled mentors with years of organizational and experiential knowledge.

Recommendations

1. Continue to encourage bright, talented, and caring people to enter the field of nursing, and encourage incumbent worker education and training to meet employer needs and counteract the nurses nearing retirement.
2. Promote and facilitate educational and career advancement of all nurses and increase the number of nurses working in primary care.
3. Increase initiatives to improve retention of Florida's existing nurse workforce, including accommodating the effects of aging on a nurses' ability to practice.
4. Support the Center's research to assure sufficient collection of data and optimal use of resources.

INTRODUCTION

The Florida Center for Nursing (Center), in partnership with the Florida Board of Nursing and Florida Department of Health, Division of Medical Quality Assurance, has collected nurse workforce data since January 2008 via a voluntary Workforce Survey. The survey is integrated into the online license renewal process for all nurse licensees. This report provides information on Florida's registered nurse (RN) population using data collected during the license renewal cycle of January 2014 – December 2015. Characteristics of Florida's nurse population, such as size, demographics, and employment information are described herein. Current information is also compared to data from previous license renewal cycles and trends of the changing RN workforce are discussed. Data on the state's supply of nurses provides valuable information to nurse employers, nursing schools, nurse faculty, workforce planners, and policy makers.

FLORIDA'S RN SUPPLY AS OF DECEMBER, 2015

The nurse license renewal cycle is completed every two years, with the most recent renewal cycle from January 2014 through December 2015. The Center used a data extract from late December 2015 to represent the current population of licensees.

When Florida's nurses renew their licenses online, they have the option to participate in the Center's Workforce Survey. RNs newly licensed in Florida during this same period are given the option to participate in the survey, although to do so requires extra effort as it is not incorporated in the application process. Ninety-two percent of those eligible to renew their license and 19% of the new licensees participated in the survey.

The Center uses responses to the workforce survey to estimate the number of nurses working in Florida. Because response rates were lower than 100%, this estimate was calculated by extrapolating survey results for certain questions to nurses who did not respond to the Workforce Survey. More information about the data processes can be found in the Center's technical report.¹

Florida's RN license database had nearly 296,000 RN licensees as of December 2015, but far fewer are actually working as an RN in Florida (see Figure 1). Approximately 225,000 (76%) met the criteria for being counted as part of the *potential* RN workforce: an active license, Florida address, and no disciplinary restrictions. This group of RNs is capable of providing nursing labor in Florida. Of this group, 184,188 participated in the Nurse Workforce Survey. From their responses, we estimate that nearly 86% of the *potential* RN workforce, or 193,025, are *actually* working in nursing in Florida. Thus, the employed RN population represents 65% of the total licensees.

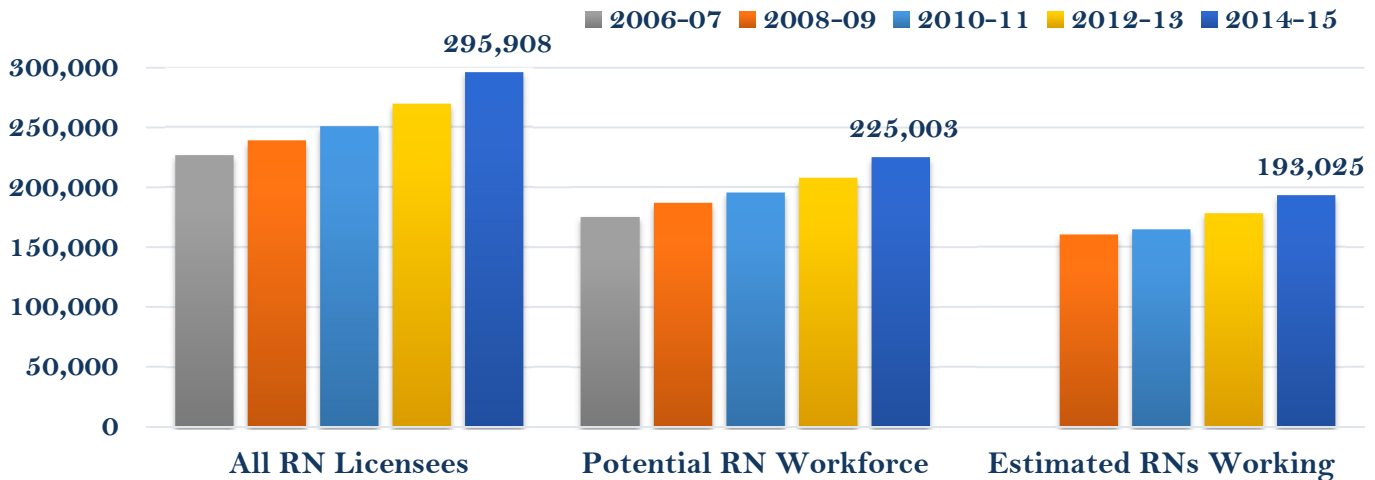


Figure 1. Florida’s RN Supply Trend, 2006-07 to 2014-15

Note: Estimated number of working RNs was not available for 2006-2007 data.

Trend analysis shows an increase in the potential RN workforce and in the number of working RNs. Florida’s potential RN workforce has increased every cycle since 2006-07. From 2012-2013 to 2014-2015, it gained over 17,000 nurses representing an 8% increase. Accordingly, the estimated number of working RNs has increased by nearly 15,000 during the same time period. This workforce increase is primarily the result of the numerous nursing programs opening in Florida over the past several years, and the resulting increase in nurses graduating and entering Florida’s workforce. During Academic Year 2014-2015, Florida had 168 Associate Degree in Nursing (ADN) programs and 61 pre-licensure BSN programs, a considerable increase from 46 ADN programs and 25 BSN program in academic year 2007-2008.^{4,5}

RN WORKFORCE GAINS AND LOSSES

To further investigate net change in the potential nurse workforce, the Center tracked individual licensees into and out of the workforce over the two-year period. During the past two years, the potential nurse workforce actually gained nearly 44,000 RNs, but during the same time lost about 23,000 RNs (see Figure 2). This resulted in a net increase of about 21,000 RNs, the highest since 2008-09.



Figure 2. Florida’s Potential RN Workforce Gains and Losses, 2008-09 to 2014-15

Table 1 shows the sources of additional nurses to the potential nurse workforce in 2014-2015. Almost 31,000 of the increase observed in the potential workforce was from new licensees. There were about 2,500 more new licensees by exam compared to 2012-2013, which is to be expected as several new nursing schools have opened and other schools have increased their number of admitted students. Over 9,000 RNs endorsed into Florida with a nursing license from another state, and more than 3,500 existing Florida RNs moved into the potential workforce by changing their information to a Florida address.

Table 1. New Additions to the Potential RN Workforce, 2014-2015

	n
New Licensee by Exam	21,600 ^a
New Licensee by Endorsement	9,020
New Florida Address	3,537
Changed to eligible status	5,796
Changed to active status	70
Unknown New Licensee	38
Total	40,061

^a *New RN licensees by NCLEX examination also include LPNs who became RNs during the past two years.*

Approximately 51% of nurses lost from the potential RN workforce failed to renew their nursing license as scheduled in 2014 or 2015 (see Table 2). Unfortunately, when nurses drop their nursing license, we do not learn whether they did so in order to move out of state, work outside the field of nursing, or retire. Thus, the numbers falling into many of the other categories may be much higher than reported. Almost 5,000 RNs were dropped from analysis because their address indicates they are no longer living and/or working in Florida, 1,034 fewer than during 2012-2013. Over 3,800 RNs were “lost” from the potential RN workforce because they upgraded to an ARNP or CNS license, and thus will be counted in those data.

Table 2. Losses from the Potential RN Workforce, 2014-2015

	n
Failed to Renew	11,859
No longer living and/or working in FL	4,949
RN upgrade to ARNP or CNS	3,855
License Went Null and Void	1,212
Changed to Inactive Status	250
Changed to Retired Status	1,064
Disciplinary Action	124
Obligations/Probation	105
Other Reason for Attrition	108
Total Attrition	23,526

EMPLOYMENT CHARACTERISTICS

Approximately 86% or 158,679 of the RNs responding to the nurse workforce survey indicated that they are working as RNs in Florida (see Figure 3). Florida’s workforce participation rate of RNs has remained the same since the 2012-13 supply report. About 5% of RNs are not seeking work at this time and about 4% responded that they are retired (but still have an active license and remain in the potential nurse workforce). Three percent of RNs are seeking work as a nurse, and a negligible number are looking for work in a field other than nursing. The “Not applicable” category is an artifact of the questionnaire and may indicate that someone is employed outside of nursing.

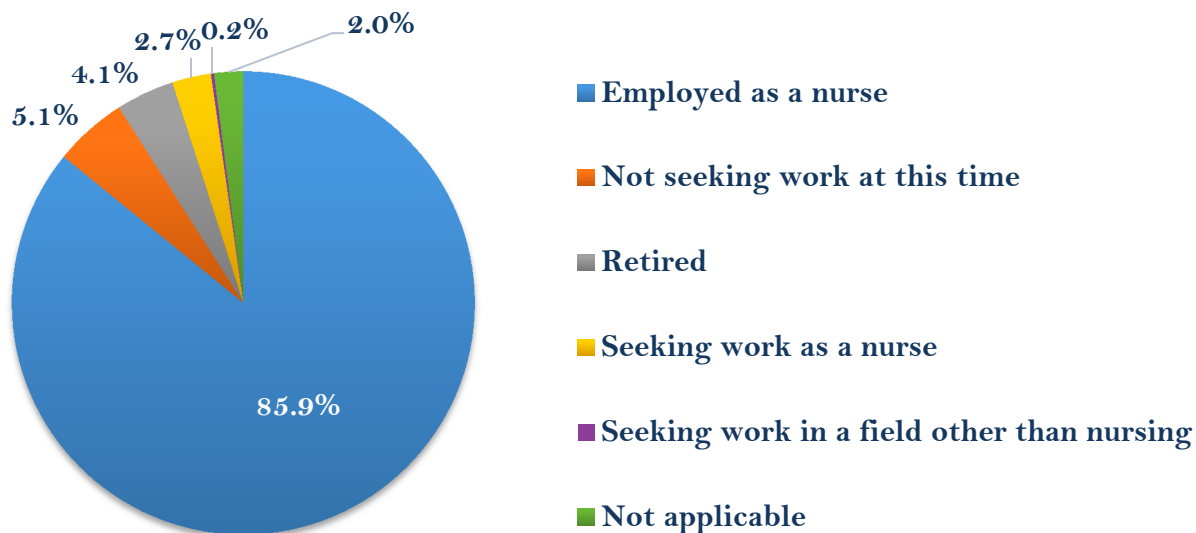


Figure 3. Work Status of RNs in 2014-2015

The survey also asked the reasons why nurses are not working. The number one reason for unemployment among RNs (i.e. those not seeking work at this time, seeking work as a nurse, or seeking work in a field other than nursing) was *taking care of home and family* at 44% (see Figure 4). Examining the data by age shows that RNs aged 30 and younger are most commonly not working because of school (32%) and taking care of home and family (30%). Since most new nursing graduates have not yet taken the survey (because they have not renewed their license), it is difficult to identify if this group is having difficulty finding jobs.

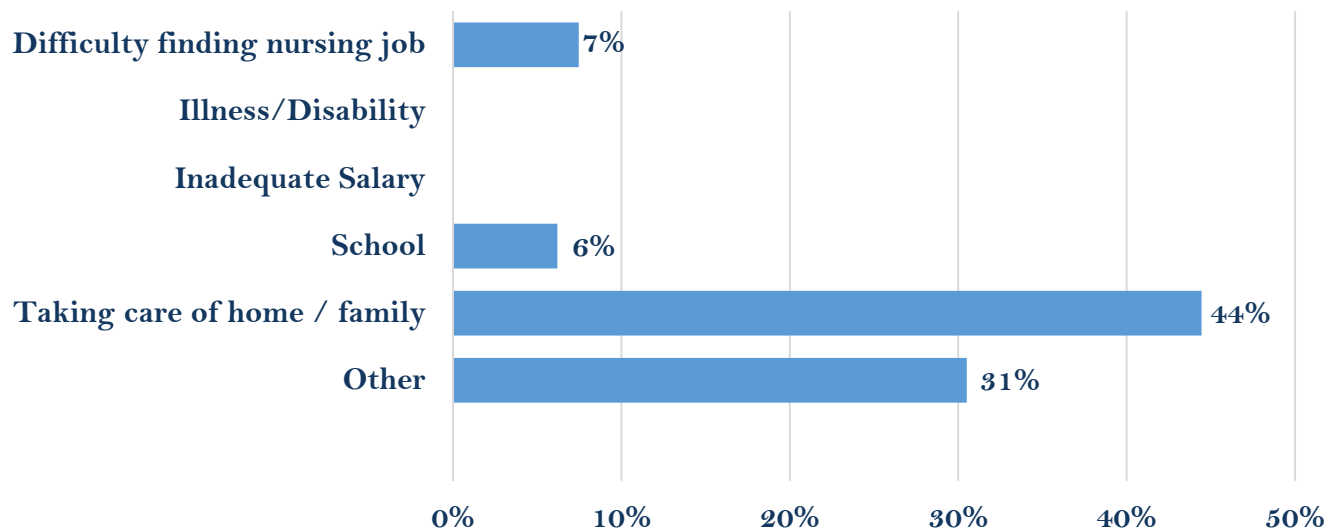


Figure 4. Reasons RNs are Not Working

Table 3 shows the number and percentage of RNs employed by care setting from the past four Nurse Workforce Survey cycles. The rate of RNs employed by industry has remained fairly steady since the 2008-2009 survey. Hospitals employ most of the RN workforce at 63.5%. The second largest employment setting for RNs is home health care (6.4%) followed by long-term care (4.8%). Other prominent employment settings for RNs include ambulatory care (4.4%), hospice (3.2%), and physician or other provider offices (2.6%).

Table 3. RNs Employed by Setting, 2008-09 to 2014-15

	2008-09		2010-11		2012-13		2014-15	
	n	%	n	%	n	%	n	%
Academic Setting	2,421	1.5	2,626	1.6	2,976	1.7	3,455	1.8
Ambulatory Care	7,791	4.9	7,544	4.5	8,377	4.7	8,493	4.4
Corrections Facility	1,379	0.9	1,422	0.9	1,372	0.8	1,988	1.0
Healthcare Consulting / Product Sales	882	0.6	803	0.5	980	0.6	1,274	0.7
Home Health Care	12,728	7.9	14,318	8.6	14,383	8.1	12,412	6.4
*Hospice	-	-	-	-	-	-	6,119	3.2
Hospital	102,241	63.8	106,515	63.7	113,908	63.9	122,590	63.5
Insurance Company	3,142	2.0	2,542	1.5	3,137	1.8	4,497	2.3
Long-Term Care	7,310	4.6	9,032	5.4	9,482	5.3	9,323	4.8
Occupational Health	577	0.4	535	0.3	570	0.3	1,370	0.7
Physician or other Health Provider Office	5,242	3.3	5,102	3.1	5,258	3.0	4,961	2.6
*Policy / Planning / Regulatory / Licensing Agency	-	-	-	-	-	-	347	0.2
Public/Community Health	3,751	2.3	3,613	2.2	3,511	2.0	3,108	1.6
School Health	1,731	1.1	1,823	1.1	1,836	1.0	1,930	1.0
Temporary Agency	818	0.5	418	0.3	428	0.2	521	0.3
*Urgent Care/Walk-in Clinic	-	-	-	-	-	-	676	0.4
Other	10,291	6.4	10,989	6.6	12,013	6.7	9,960	5.2

*Data unavailable for 2008-2013 renewal cycles.

Although the percentage of RNs employed by hospitals has remained steady, as the RN population has grown hospitals have absorbed the increase by employing over 8,600 more RNs over the past two years. Growth was observed in all employment settings with the exception of home health, long-term care, physician offices, and public/community health.

The Nurse Workforce Survey also inquired about a number of employment details: occupational titles, occupational practice area, hours worked per week, and full-time/part-time status. In terms of occupational titles, the majority of RNs were staff nurses (68%) followed by nurse managers (8%) and nurse faculty (4%); (see Figure 5).

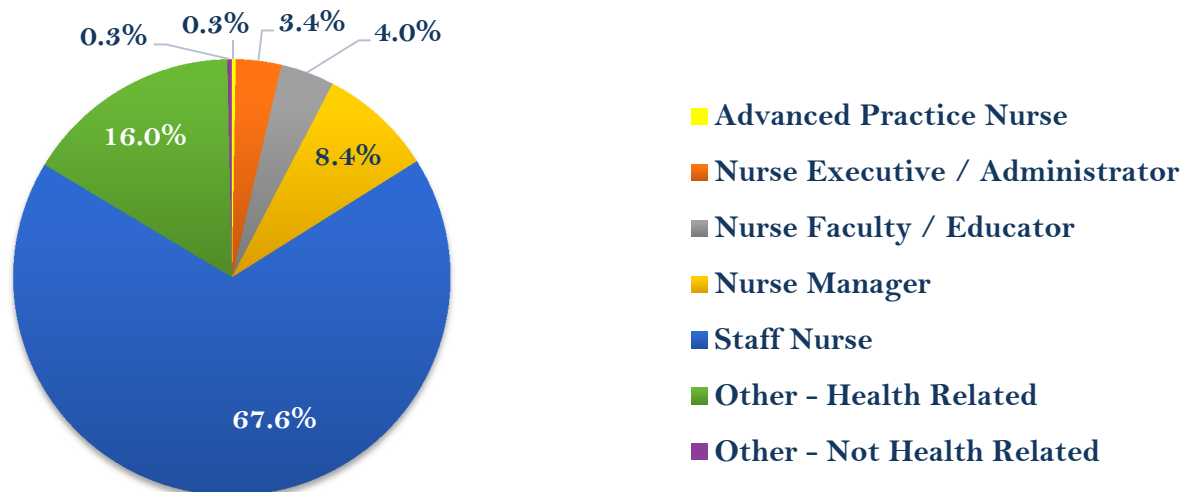


Figure 5. RN Occupational Titles

The most common practice areas for RNs were acute/critical care (18.9%), maternal and child health (13.6%), and medical surgical (13.6%); (see Figure 6).

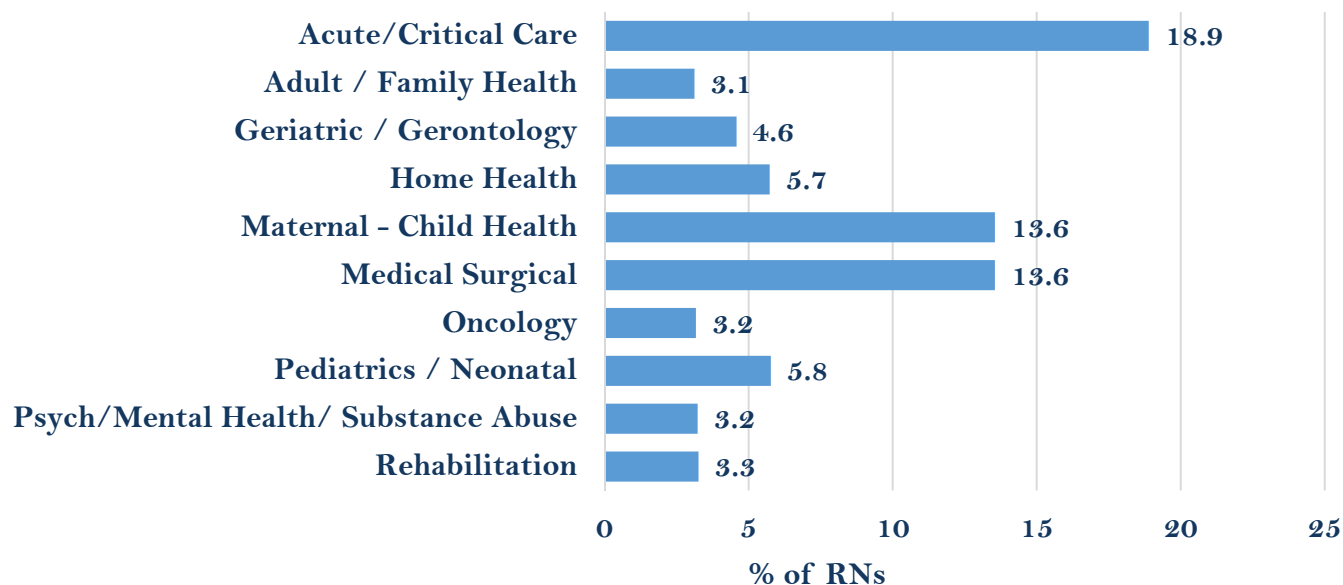


Figure 6. RN Clinical Practice Areas

The percentage of RNs reporting working full-time has slightly increased since the previous license renewal cycle (see Table 4). The proportion of Florida’s RNs working full-time continues to be much higher than the 74.6% national estimate.⁶ The percentage of RNs working multiple jobs, the distribution of hours worked, and the average FTE has also remained stable since the previous survey.

Table 4. Employment Detail for RNs Working in Nursing

	2008-09	2010-11	2012-13	2014-15
Employment Status (%)				
FT	79.5	82.5	82.7	83.0
PT	11	9.5	9.2	8.6
Per Diem/Agency	9.6	8.1	8.2	8.4
Multiple Jobs? (%)				
Yes	16.1	12	11.5	11.5
No	83.9	88	88.5	88.5
Hours Per Week (%)				
20 or fewer	5.8	6.7	6.6	6.6
21-30	7.9	7.6	7.5	7.3
31-35	4.8	4.1	3.9	3.5
36-40	48.3	60.3	61.8	61.8
41-50	27.2	16.3	15.5	15.9
51 or more	5.9	5.1	4.8	4.9
Average FTE*	0.9	0.88	0.89	0.89

*FTE = Full-time equivalent

DEMOGRAPHICS

Demographic characteristics of working RNs are shown in Table 5. The nurse workforce is predominately white (65%) and female (89%). Approximately 17% of working RNs are over the age of 61; representing over 26,000 RNs who may leave the nurse workforce within 5 years. The even larger cohort of nurses age 51-60 represents about 27% of working nurses, indicating that more than 43,000 RNs can be expected to phase out of the workforce through retirement within 5 to 10 years.

Table 5. Demographic Characteristics of RNs Working in Nursing

Race/Ethnicity		Age	
White	64.7%	21-30	10.7%
Black	13.6%	31-40	20.6%
Hispanic	11.5%	41-50	24.8%
Asian	7.2%	51-60	27.3%
Native American	0.2%	61 or older	16.5%
Other	2.8%	Average Age	47.5
Gender			
Female	88.9%		
Male	11.1%		

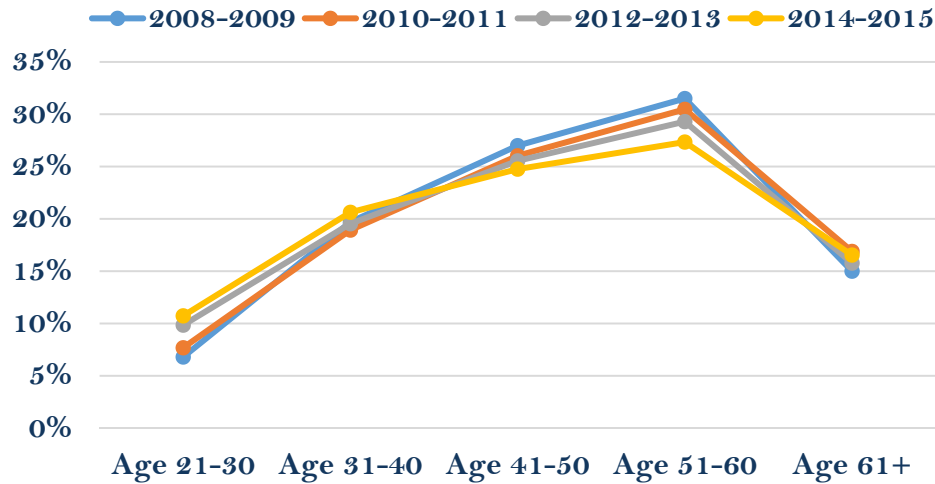


Figure 7 displays the age distribution trends of working RNs. As Florida’s workforce ages, the retirement of older, experienced nurses will result in a loss of highly skilled mentors with years of organizational and experiential knowledge. Furthermore, the size of the nurse workforce will likely be reduced as the cohort of RNs under age 30 represents only about 11% of all working RNs. The percentage of working RNs in this youngest age group has increased by nearly one percent from the last survey, which may indicate an increase in younger people entering

Figure 7. Age Distribution Trends of Working RNs

the workforce and a general minimal shift to a younger workforce over the next few years albeit small. Also of note is that younger nurses are more diverse than their older peers (see Figure 8).

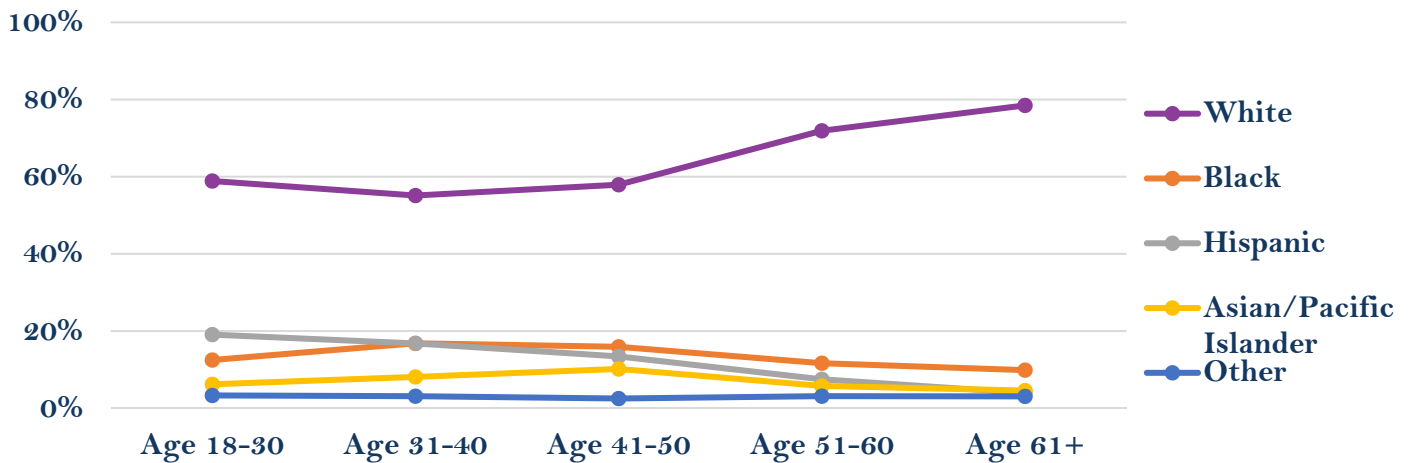


Figure 8. RN Race/Ethnicity by Age Group

ACADEMIC ACHIEVEMENT

Educational attainment of nurses has become a national topic of discussion since the 2010 Institute of Medicine’s (IOM) report, “The Future of Nursing: Leading Change, Advancing Health”.⁷ Recommendation 4 of the report is to increase the proportion of employed RNs with a baccalaureate degree in nursing or higher to 80 percent by 2020. In Florida, about 46% of the RN workforce has an RN diploma or RN Associate’s Degree as the highest degree (see Figure 9). Nearly 38% of working RNs have a baccalaureate degree in nursing (up almost 3% from the last survey), and 9% have a Bachelor’s degree in another field. Among higher degrees, 5.2% have a Master’s in Nursing, 1.9% have a Master’s in another field, and 0.9 percent have a Doctoral degree. Nationally, the percentage of RNs with a baccalaureate degree in nursing or a higher degree (in any field) is 51%, compared to 45.6% in Florida.⁸ Florida’s percentage of RNs meeting IOM Recommendation 4 continues to increase, from 39.5% in 2010-11 to 45.6% in 2014-15.

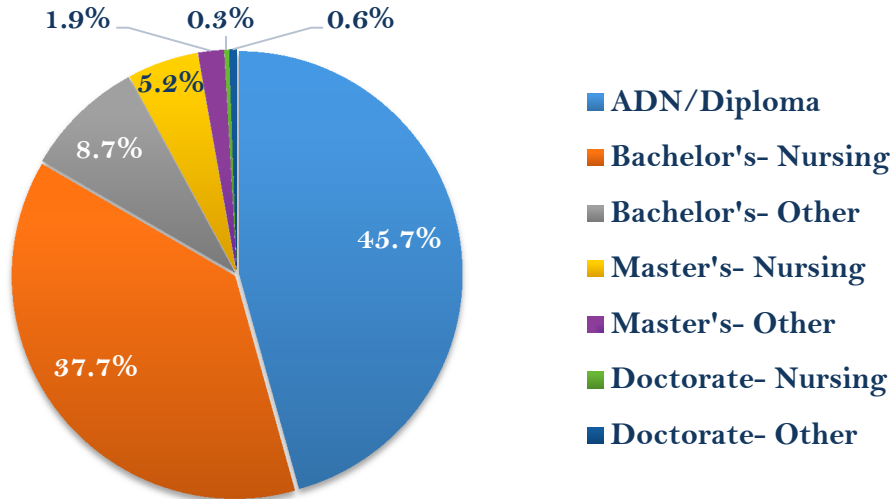


Figure 9. Highest Educational Degree of RNs Working in Nursing

Strides have also been made with regards to the IOM's Recommendation 5, which is to double the number of nurses with a doctorate by 2020. The number of nurses with a doctorate increased from 1,054 in 2010-11 to 1,427 in 2014-15.

FTES BY AGE AND EMPLOYMENT SETTING

A full-time equivalent (FTE) indicates the workload of an employee and refers to the ratio of hours worked by an employee in a given time period by the number of hours considered full-time for that same given time period. Among all working nurses, the average proportion of an FTE was 0.89 for RNs. As nurses get older, they often work fewer hours, and this is noticeably apparent in the 66 and older age group. The average FTE by age group is shown in Figure 10. The 21-25 age group has the highest average FTE of 0.96, then average FTE hovers near 0.92 until the 61-65 age group, where the FTE decreases to 0.87. Nurses aged 51-60 are the largest age cohort and this is the group that can be expected to reduce their number of hours worked or leave the workforce entirely over the next decade.

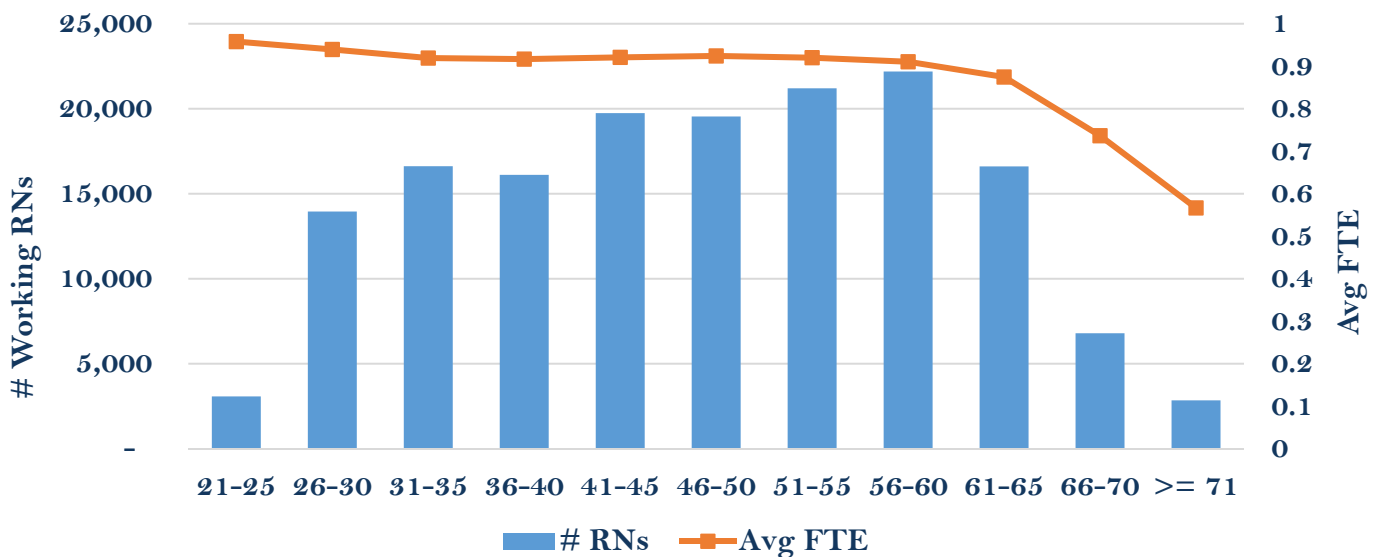


Figure 10. Number of RNs Working and Average FTE by Age Category

Table 6 shows the estimated number of FTEs as well as the average proportion of an FTE worked by nurses in each healthcare setting. Hospitals contain the largest proportion of FTEs at 111,949 (an estimated 7,600 more FTEs than during 2012-2013). RNs working for hospitals, insurance companies, public health, policy, nursing homes, and hospices worked the most hours per week as evidenced by their higher average FTE. RNs working for temporary agencies and school health worked the fewest hours per week.

Table 6. Estimated and Average FTEs by Setting

Setting	Estimated Number of FTEs	Average FTE
Hospital	111,949	0.93
Home Health	9,851	0.81
Other	8,393	0.86
Nursing Home/Extended Care	7,542	0.90
Ambulatory Care Setting	7,057	0.85
Hospice	5,417	0.90
Physician's Office	4,180	0.86
Insurance Claims/Benefits	4,085	0.92
Academic Setting	2,815	0.83
Correctional Facility	1,754	0.89
School Health Service	1,485	0.78
Public Health	1,425	0.92
Community Health	1,237	0.83
Occupational Health	1,164	0.84
Healthcare Consulting/Product Sales	1,088	0.85
Assisted Living Facility	603	0.81
Urgent Care/Walk-in Clinic	562	0.85
Temporary / Staffing Agency	379	0.74
Policy/Planning/Regulatory/Licensing Agency	307	0.91

Note: A full-time position is 1.0 FTE. Higher average FTEs indicate more full-time positions and lower average FTEs indicate more part-time positions.

NURSE WORKFORCE BY STATE POPULATION

Growth in the number of nurses does not take into account the changing patient population driving the demand for healthcare. To better understand the nurse supply in relation to the state's population, we compared the number of working nurses to the size of the state's population⁹ and to the number of hospital beds.¹⁰ Statewide, there are an estimated 974 working RNs per 100,000 population in 2015. The number of working RNs per 100,000 population continues to increase, from 849 in 2009¹¹ to 885 in 2011 to 931 in 2013. As of 2010, the national estimate was 921 working RNs per 100,000 population.^{12,13} The increase in the number of nurses per 100,000 population should be interpreted strictly numerically, as it does not take into account exogenous factors such as an aging population, increased care need, and changing staffing models – all of which might require more nurses. The estimated number of employed RNs per 100 hospital beds increased to 310, up from an estimated 297 employed RNs per 100 hospital beds in 2012-13, which may be another indicator of changing staffing needs and increased patient acuity.

CONCLUSION

Florida's RN population and workforce continue to grow as observed in the steady increase in nurse supply from the 2006-2007 cycle to the 2014-2015 cycle. In 2008-09, there were an estimated 160,000 working RNs in the state but the most recent records indicate that the nurse workforce had an estimated 193,000 RNs, an increase of 33,000 RNs. This increase is primarily due to the numerous nursing programs that have opened in Florida over the past several years and the resulting increase in the number of nurses graduating and entering Florida's workforce. During Academic Year 2014-2015, Florida had 168 Associate Degree in Nursing (ADN) programs and 61 BSN programs, a considerable increase from 46 ADN programs and 25 BSN programs in academic year 2007-2008.^{4,5} Florida's RN workforce is also becoming more highly educated as recommended by the IOM. The proportion of working nurses with a baccalaureate degree in nursing or higher has steadily increased since 2011 going from 39.5% to 45.6% in 2015. These results coincide with the findings from FCN's 2015 Nurse Employer survey, which indicate that over 70% of hospitals preferentially hire new BSN graduates.¹⁹

The national and state healthcare workforce will continue to be affected by demographic, policy, and technological trends. Florida's population over age 75 is predicted to grow from 8.4% currently to 9% in 2020 and 11% in 2030¹⁴. As the population ages, more nurses will be needed to care for the older population. At the same time, about 69,000 RNs in Florida are expected to retire in the next 15 years, and the replacement population is currently much smaller than the anticipated number of retirees. The profession of nursing will be affected by other factors: nurses must continually update their knowledge of new treatments and procedures as well as their technological skills in the areas of nanotechnology, telemedicine, and digital health information. Nurses must be prepared to work with patients who are educated consumers of health information and to be skilled health educators. Other professional changes include a shift to population-based care and more complex care, managed care and cost containment strategies resulting from the Affordable Care Act, collaborative and interdisciplinary practice, and continual scientific advances and lifelong learning.¹⁵

Due to these societal changes and the aging of the nurse workforce, the American Association of Colleges of Nursing continues to predict a national shortage of RNs, and is working to address this looming shortage through strategies, legislation, and collaborative partnerships.¹⁶ Nationwide, the number of RNs is expected to grow by 439,300 or 16% from 2014 to 2024. During this time there are expected to be 1,088,400 RN job openings due to job creation or replacement, indicative of both a high expected number of retirees and new job creation.¹⁷ The same situation will be seen within Florida. The Center estimates that there are currently 12,493 vacant RN positions statewide and anticipates job growth with the creation of 9,947 RN positions in 2016.¹⁹ Furthermore, baseline (2010) forecasts indicate that Florida will face a shortage of 50,321 RN FTEs by 2025.¹⁸ The Health Resources and Services Administration recently updated its forecasting model, which will allow the Center to produce more accurate projections of the state's nurse supply, demand and shortage.

RECOMMENDATIONS

Recommendation 1. Continue to encourage bright, talented, caring people to enter the field of nursing, and encourage incumbent worker education and training, in order to meet industry needs and counteract the looming large numbers of nurses nearing retirement.

Recommendation 2. Promote and facilitate educational and career advancement of all nurses: increase the number of RNs with a BSN, increase the number of nurses qualified to teach, and increase the number of nurses working in primary care.

Recommendation 3. Increase activities to improve retention of Florida's existing nurse workforce and extend their work life, including accommodating the effects of aging on a nurses' ability to continue to practice. Such activities may involve efforts to transition nurses from one practice environment to another.

Recommendation 4. Support the Center's research effort and analysis of workforce trends to assure the Center attains the best data on the supply of all types of nurses, providing the basis on which to maximize use of limited resources.

ACKNOWLEDGEMENTS

The Florida Center for Nursing wishes to thank all of the nurses who took the time to complete the Center's survey. We also wish to thank our partner state entities, the Florida Board of Nursing and Medical Quality Assurance for their assistance with the data collection. The Center also wishes to thank Florida Blue for their continued support. This research would not be possible without their valuable contributions.

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