

**Nurses for Wisconsin: A collaborative initiative to enhance the nurse educator workforce**

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**Abstract**

Wisconsin, like much of the nation, is currently suffering from a growing nursing shortage. The University of Wisconsin-Eau Claire College of Nursing and Health Sciences, in partnership with the UW-Madison, UW-Milwaukee and UW Oshkosh nursing programs, took advantage of a University of Wisconsin System Incentive Grant for economic and workforce development to address this problem. With a 3.2 million dollar award, the *Nurses for Wisconsin* goal is to increase the number of baccalaureate Registered Nurses (BSNs) by expanding the nursing education capacity within the University of Wisconsin System. *Nurses for Wisconsin* is accelerating the preparation of nursing faculty by supporting nurses to enroll in Doctor of Nursing Practice (DNP) or nursing Ph.D. programs with pre and postdoctoral fellowship awards ranging from \$21,500 to \$90,000, and the recruitment of faculty with a loan repayment program of up to \$50,000. In exchange for the financial support, fellows and faculty must make a three-year commitment to teach in a UW System nursing program. Two conferences for program participants are also funded through the award. The first conference was held in October 2014. The second conference is scheduled for summer 2015. With the first year of the two year project completed, this article describes *Nurses for Wisconsin* from inception to implementation, and mid-term assessment with a focus on lessons learned. A follow-up article addressing final outcomes and next steps is planned.

Key Words: Economic development, workforce development, pre-doctoral fellowships, postdoctoral fellowships, loan forgiveness, grant, nursing education, nursing shortage, nursing faculty shortage

### **Nurses for Wisconsin: A collaborative initiative to enhance the nurse educator workforce**

A comprehensive analysis of Wisconsin's nursing workforce data tells the story of a state on the cusp of a nursing shortage (Wisconsin Center for Nursing, 2013a). This is occurring at a time when interest by qualified students seeking admission to baccalaureate programs in nursing is increasing, while the number of nursing faculty available to teach is decreasing. This scenario is positioned within the larger context of a national nursing faculty shortage (American Association of Colleges of Nursing, 2014) and the charge from the IOM Report, *The Future of Nursing: Leading Change, Advancing Health* that 80% of the nursing workforce have a BSN degree and that the number of nurses with a doctorate double, both by 2020 (Institute of Medicine [IOM], 2011). A policy statement from the Tri-Council for Nursing (2010), further states that "A more highly educated nursing profession is no longer a preferred future; it is a necessary future in order to meet the nursing needs of the nation and to deliver effective and safe care" (para. 3).

Interest in obtaining a baccalaureate degree in nursing within the UW System is strong but the ability to accept all qualified applications is limited. UW System nursing programs are turning away qualified applicants to nursing programs. In the 2012-2013 academic year, 50-80% of qualified undergraduate students who applied to UW-Eau Claire, Madison, Milwaukee, or Oshkosh were denied admission due primarily to a shortage of well-qualified nursing faculty (S.P. Lundeen, K.A. May, R. Smith; L.K. Young, personal communications, October, 2013). This again reflects the national trend in nursing education. The 2014 American Association of Colleges of Nursing Shortage Fact Sheet (2014) reported that across the country nearly 80,000

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qualified applicants to baccalaureate and graduate nursing programs were denied admission due to lack of a sufficient number of faculty (American Association of Colleges of Nursing, 2014).

The projected need for nurses in Wisconsin is great. *Be Bold 2: Growing Wisconsin's Talent* revealed significant impending shortfalls within the Wisconsin workforce. By 2018, 24% of all jobs in Wisconsin will be in the nursing and health-related professional career cluster. Projections suggested there will be a 43% increase in demand in this sector with only a 13% increase in available workforce (Competitive Wisconsin, Inc. & ManpowerGroup, 2012). More specifically, the Wisconsin Department of Workforce Development (DWD) predicts a shortfall of 20,000 nurses (35%) by 2035 (Wisconsin Center for Nursing, 2013a).

The 2014 *Wisconsin Registered Nurse Survey*, which highlights the characteristics of 83,918 RNs in the state, indicates that over 35% of the nursing workforce intends to leave direct patient care in the next nine years (Wisconsin Center for Nursing, 2014a). The recent economic downturn and continuing job satisfaction that nurses experience has postponed retirements for many older nurses (Buerhaus, Auerback, & Staiger, 2009; Auerbach, Buerhaus, & Staiger, 2014) and delayed the Wisconsin nursing workforce crisis.

However, one-third of the nation's nursing workforce (nearly 1 million nurses) are predicted to retire over the next two decades (Health Resources and Services Administration, Bureau of Health Workforce, National Center for Health Workforce Analysis, 2014). According to a recent study conducted by The National Forum of State Nursing Workforce Centers, 53% of the nurses working are age 50 and older (Budden, Zhong, Moulton, & Cimiotti, 2013). Wisconsin is experiencing this same trend. Between 2012 and 2014 the number of nurses age 55 and older in the workforce increased from 27.6% (16,367) to 33.5% (24,491). During that same

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period the number of nurses who identified themselves as retired increased from 5.5% to 6.3% (Wisconsin Center for Nursing, 2014a).

In response to the anticipated retirements, increasing the enrollment and graduation of a large number of new nurses who are capable and committed to Wisconsin is critical (Wisconsin Center for Nursing, 2014a). Researchers Juraschek, Zhang, Ranganathan, and Lin (2012) predict nursing shortages in all 50 states occurring between 2009 and 2030. Their report models and forecasts the future supply and demand, taking into consideration population, age, and staffing ratios. Using a letter grading scale of A-F, the authors gave Wisconsin a grade of “D” in its supply of RNs by 2030.

The projected demand for nurses over the next two decades, as modeled by the DWD Office of Economic Advisers (Table 1), cannot be met given the faculty demographics.

Currently, the average age of Wisconsin nursing faculty is 58 years and 58% of faculty plan to leave the workforce in less than nine years (Wisconsin Center for Nursing, 2014b). These data highlight a compelling need to increase faculty numbers beyond current levels within the next ten years. In addition, only 0.6% (513) of the nursing workforce in Wisconsin is prepared at the doctoral level

**Table 1.** Adapted from “The Wisconsin Nursing Workforce: Status and Recommendations,” p. 18. Copyright 2013 by the Wisconsin Center for Nursing. Source: Walsh, T., Udalova, V. & Winters, D. (2011). Wisconsin Registered Nurse Supply and Demand Forecasting: Results Report 2010-2035. Wisconsin Department of Workforce Development, Office of Economic Advisers. Wisconsin DWD Office of Economic Advisers, November, 2011 (p. 5).

<b>Estimated number of nursing graduates needed annually to meet projected demand</b>	
2010 (actual)	2,700
2015	4,500
2020	7,500
2025	11,300
2030	14,100
2035	15,500

(Wisconsin Center for Nursing, 2014a). The key factors driving the need for more doctorally prepared nurses include: increased demand for nurse educators to prepare future nurses at the baccalaureate and graduate level, increased demand for nurse practitioners to provide primary

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care to the newly insured in our expanding health care system, and increased demand for nurse researchers to generate new knowledge and advance the profession (American Association of Colleges of Nursing, 2015).

### **The Nurses for Wisconsin Grant Proposal**

The 2013-15 Wisconsin Legislatures' Biennial Budget required the UW System Board of Regents to invest \$22.5 million to increase economic growth and build a stronger Wisconsin workforce. In late September, 2013, the UW System Office of Economic Opportunity announced the Economic Development Incentive Grant program and invited all UW institutions to submit applications (University of Wisconsin System, Office of Economic Development, 2013). Proposals were required to advance efforts in one or more of the following areas: economic development; development of educated and skilled workforce; and, improving affordability of postsecondary education. Applications were due on October, 2013.

Coincidentally, faculty, instructional staff, and administrators from the six UW System nursing programs were in attendance at a conference on September, 2013, entitled "Identifying, Recruiting and Retaining Nurse Educators in Wisconsin." This event was hosted by the UW-Eau Claire, College of Nursing and Health Sciences (CONHS). At the end of this conference the CONHS dean was informed of the RFP that was circulated to all UW System campuses for these economic incentive dollars. She immediately engaged the deans of the four UW System programs offering doctoral nursing degrees in formulation of a plan to address the nursing faculty shortage. The application addressed all three of the goals of the Incentive Grant program. The economic development criteria was met by the inclusion of the long-term goal to increase the number of baccalaureate prepared nurses available for employment by Wisconsin healthcare



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organizations. The educated and skilled workforce development criteria was addressed by increasing the number of doctorally prepared nurses. The criteria to improve affordability for postsecondary education was met by offering predoctoral and postdoctoral fellowships.

Over the next two weeks the grant application was researched, written, revised, and finalized with email and phone contact between the deans, the CONHS grant developer, and relevant UW-Eau Claire offices. The ability to resource state nursing workforce data in regards to the nursing shortage, nursing faculty shortage and projections of future workforce needs was key to creating our case for this initiative. In Wisconsin, we relied heavily on data generated by the Wisconsin Center for Nursing and Wisconsin Economic Development reports.

Institutional approval was secured, and the incentive grant application with letters of support was submitted by the deadline. UW-Eau Claire is the lead on this four-campus initiative.

A committee consisting of Wisconsin business, industry and academic leaders reviewed fifty-six applications and selected twelve to receive funding. In November, 2013 it was announced that the Nurses for Wisconsin: Learn, Teach, Lead project received the largest award, over 3.2 million dollars. The project, implemented at UW-Eau Claire, UW-Madison, UW-Milwaukee, and UW Oshkosh, consists of three arms: (1) predoctoral fellowships awarded in the amount of \$43,000 each year in tuition, fees, and stipend to accelerate the completion of a nursing Ph.D. or DNP program; (2) postdoctoral fellowships in the amount of \$60,000 plus fringe benefits annually to attract doctorally-prepared faculty to UW System nursing programs; and, (3) a loan repayment program to attract and retain new faculty during the 2013-2015 biennium. Employees hired under this agreement receive up to \$50,000 for repayment of their student loans. All awards are in exchange for a commitment to teach three consecutive years at a

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UW nursing program. Additional funding provides for two education conferences, as well as a project director and the development and implementation of a marketing plan.

UW System Regent and Chair of the Research, Economic Development, and Innovation (REDI) Committee of the Board of Regents, in reference to the Nurses for Wisconsin award stated, “In a time when the demographics of an aging Baby Boomer population place increasing demands on healthcare, this funding will help alleviate the nursing shortage in Wisconsin by addressing the educational, workforce, and economic development needs in this critical area. It will also help position Wisconsin to be more competitive with other funding providers locally and nationally going forward” (University of Wisconsin System, 2013, para. 5).

### **Journey to Implementation**

Upon receiving notification of 3.2 million dollar award, the deans met to decide the dollar amounts to be assigned to each campus. The research intensive programs at UW-Madison and UW-Milwaukee offer both PhD and DNP programs. They were each allocated \$800,000. The comprehensive campuses, UW-Eau Claire and UW Oshkosh, offer DNP programs. They were each allocated \$745,000. A common application form was developed, but individual campuses took responsibility for selecting candidates, dispersing funds and monitoring awardees.

The first sets of documents created for this project included the promissory note for the pre and postdoctoral fellowship program and loan repayment agreement. This involved working closely with a UW System attorney whose area of expertise is financial aid. The creation of the notes was a challenging and evolving process. To gain agreement from all four campuses, dialogue amongst stakeholders within and between universities occurred. Stakeholders included

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administrators, directors and staff of nursing programs, bursar's offices, financial aid, accounting, and human resources offices.

In addition to the promissory note and loan repayment agreement, a "Guideline and Procedures for Payments" document was developed by the UW-Eau Claire Administration and Finance office and shared with the other campuses. Over a dozen forms were developed or adapted for the project, including Truth in Lending Act (TILA) forms, employment verification forms, and an electronic status report e-form to monitor recipients' progression. The documents and forms related to implementation of this grant are available upon request.

Language was included in all of the agreements to address defaults. Should a default occur before or during the three year commitment to teach, the awardee is required to return the award amount to the granting institution. The institution can use these funds to support activities congruent with the goals of Nurses for Wisconsin.

### **Marketing and Outreach**

A budget to support development of a marketing plan was included in *Nurses for Wisconsin* grant. The budget funded the creation of the Nurses for Wisconsin brand which was conveyed through a variety of marketing channels, including website development ([www.nursesforwisconsin.org](http://www.nursesforwisconsin.org)), print literature, journal and e-journal advertisements, news releases and articles for campus, city, regional, state and national media outlets, conference attendance for the project director and conference display materials. Marketing materials for the Nurses for Wisconsin brand (Figure 1) feature all four partner programs; however, each campus



**Figure 1.** An example of a graphic created by UW–Eau Claire Marketing, Communication and Strategic Planning Office in support of Nurses for Wisconsin. Copyright © 2015 UW–Eau Claire and the Board of Regents of the University of Wisconsin System.

was tasked with individualizing the message to reach their specific audiences, and advisors each campus reached out to potential awardees.

This intensive marketing plan proved successful and resulted in immediate interest. Upon launch of the website and initial news releases the program received over one hundred and fifty phone and e-mail inquiries that resulted in sixty-six applications for fellowships and faculty repayment participants. The majority of inquiries were from within the state. A review of the website usage report confirms this interest with 51% of the unique page views originating from Wisconsin locations. The remainder of the views came primarily from Illinois (5%) and Minnesota (4%). Interest was also exhibited by residents from other countries, such as Canada, and Israel. The Nurses for Wisconsin brand was intentionally designed by UW-Eau Claire Marketing, Communication and Strategic Planning office to be versatile enough to apply to future initiatives.

### **Applicants and Application Process**

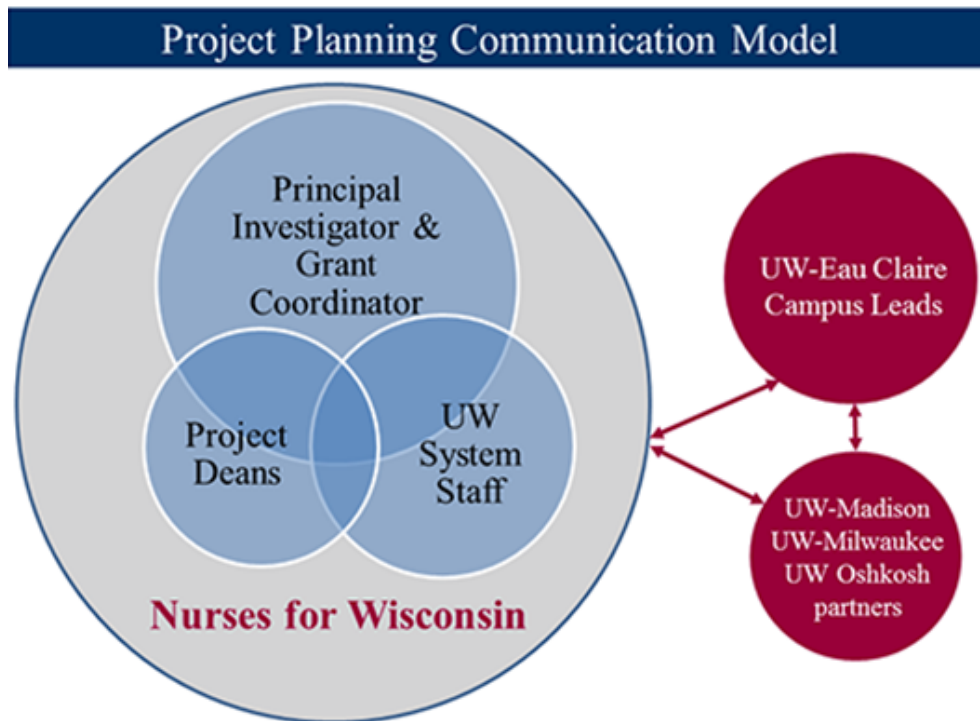
External fellowship applicants were required to have been accepted into a UW System Ph.D., DNP or postdoctoral program. Internal instructional and clinical staff were encouraged to

apply to pursue their terminal degree. UW-Eau Claire created a model application and process. The application consisted of demographic information, the student’s program selection criteria, a short essay addressing how their career goals intersect with nursing education, and their curriculum vitae. The applicants submitted their materials to one of the four participating campuses where a review team from that campus selected the awardees. Applicants were notified by letter of their award status.

Loan repayment opportunities were offered to prospective faculty as they negotiated their contract with the respective dean of the nursing program. Once the contract of hire was in place, the loan repayment agreement was secured.

### Power of Communication

The success of the project was dependent upon early and effective communication (Figure 2). Once the grant award was made, the principal investigator and grant coordinator met



**Figure 2.** Project planning communication model identifying three core planning groups with support from both UW–Eau Claire and partner campuses.

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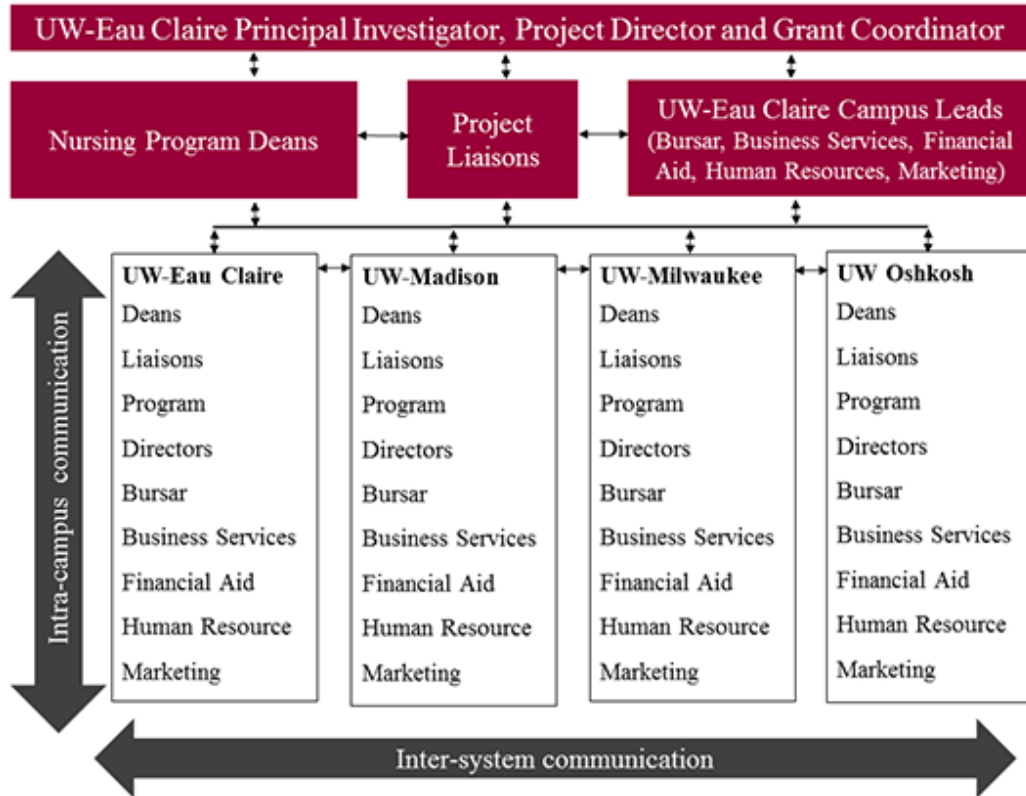
at least weekly. In addition, the deans from the involved campuses held weekly phone conferences for the first three months. The core group also included UW System staff who provided guidance on complex legal and financial issues. Their communications were primarily via email and occasional teleconferences. In addition, input from leads from specific areas (i.e. legal, financial) on the UW-Eau Claire campus was essential. Once documents were drafted, the other three partner campuses provided comments and suggestions which helped craft the final forms, policies and procedures.

Several videoconferences were held during the initial implementation phase with members from all four institutions participating. The mechanism for these conferences was a web-based system which allowed individuals to connect from conference rooms or desktop computers. The ability to bring all parties together remotely for discussion and document sharing increased the level of stakeholder involvement in the project. During the first year, face-to-face meetings occasionally occurred between the deans.

In addition, the creation of a communication framework across and within the four campuses was essential due to the complexity of the project (Figure 3). Not only did campuses need to forge new communication links within their organization, they were required to build or strengthen communication with like partners or colleagues on other campuses. Each nursing program held meetings within their university with colleagues from specific departments to assist in implementation of the award. Liaisons from all four campuses also met regularly during this period to ensure clarity and consistency of the process.

Avenues for communication with awardees include face-to-face meetings, email, telephone conferences, and the Nurses for Wisconsin website which hosts links to resources,

forms, and employment opportunities. A Desire2Learn project site was created for participants to engage in online discussions.



**Figure 3.** Project implementation communication flow chart, reflecting both vertical communication within a university and horizontal communication across institutions.

### Hiring the Right Project Director

Funding for a project director was built into the grant. A Dean Emerita from UW-Eau Claire was selected for this position. She is key to operationalizing Nurses for Wisconsin and has prior knowledge of nursing education and healthcare in Wisconsin. Additionally, she has professional relationships with state and national leaders in nursing education. The position began in January, 2014. Her numerous responsibilities included: participation in the development of the applications for pre and postdoctoral awards, and the loan repayment program; development of guidelines; and planning and implementation of the education

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conferences. The director also serves as the representative of the project to the public and media, provides information at conferences, and fields general inquiries about Nurses for Wisconsin.

A key role of the project director is the development and facilitation of communication and interaction amongst the participating nursing programs. The liaisons act as representatives for their program and have been tasked with project implementation on their respective campuses. They identify emerging issues to resolve, and assist in developing the education conferences. The project director serves as a conduit between the deans and liaison groups, attending meetings of both groups to provide timely dissemination of information and ensure a shared understanding.

She is also tasked with leading the evaluation team and overseeing assessment of the grant, inclusive of data collection and analysis during and following the grant window. She will continue a month beyond the life of the grant to conclude the evaluation of the project.

### **Learn.Teach.Lead Conferences**

The first “Nurses for Wisconsin. Learn.Teach.Lead” conference was held on the UW-Eau Claire campus, October 10-11, 2014 and focused on mentoring and career planning for fellows and loan repayment awardees. The conference also allowed project deans and program directors to interact informally and formally with potential applicants. Over fifty participants from the four campuses attended the conference which began with a Friday evening reception and deans’ roundtable. The goal of the roundtable was to introduce fellows and faculty to all four institutions and provide an opportunity for the deans to respond to questions related to careers in academia. The next day, CEO of the National League for Nursing, Beverly Malone PhD, RN, FAAN delivered the keynote address, entitled “The Power of Leadership Through Teaching and



Learning” followed by a question and answer session. The audience then attended a panel discussion by new and experienced nurse educators during, “Thrive not Just Survive: Navigating the Expectations of the Faculty Role.” The afternoon activity consisted of a workshop presented by Rachel Schiffman, PhD, RN, FAAN, UW-Milwaukee, College of Nursing, entitled, “Intentional Career Mapping: Achieving Your Outcomes – Preserving Your Energy.”

Conference evaluations were overwhelmingly positive. Participant satisfaction related to speakers and activities averaged 4.7 out of 5.0. The second Learn.Teach.Lead conference is scheduled for June 10-11, 2015 and will be held at UW-Madison, School of Nursing.

### **Challenges, Successes and Recommendations**

A review of progress to date and reflecting on the challenges faced and successes achieved thus far provide valuable insight for future initiatives. Several challenges have been part of this effort. They are summarized as follows:

- Communication of this multisite initiative was complex due to the number of internal departments involved, the number of departments from each university involved, and UW System participation. Additionally, a difference in communication styles existed within each organization because of their structure, i.e. hieratical vs flat structure.

Recommendation: Develop a communication map and project staff directory to be shared and reviewed by each campus. We also found early on that purposeful and frequent communication through a central individual was critical and should be replicated in future multisite initiatives.

- A lack of standardization across the UW system resulted in initial confusion. Examples include non-standardized job descriptions and titles, and a lack of common software

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programs and interoperability. Campuses used a variety of financial aid software programs, different videoconferencing systems, and individual instances of course management programs resulting in a lack of easy access for project participants.

Recommendation: Conduct an assessment of like roles across organizations. Request campus leads to complete a gap analysis in their specialty area with their colleagues on the other project campuses to determine possible challenges and solutions prior to implementation.

- The project itself was challenging in its complexity. Creating legal documents and understanding their implications involved numerous individuals from all four campuses and UW System staff. The incorporation of the various elements of the programs administered on four campuses demanded constant attention. The two research intensive and two education intensive universities worked to find common ground that would meet all the needs of the fellows and faculty in each of the nursing programs.

Recommendation: Nursing programs should acknowledge that this type of collaborative effort is becoming increasingly necessary. Accordingly, programs will find it advantageous to establish baseline collaborative mechanisms that can be expanded to accommodate more complex initiatives as they emerge. In addition, specific actions such as requesting a meeting of decision makers from the departments on each campus impacted by the grant proposal and involving them early in both the planning phase and development of documents and policies is critical. Instituting a document review process by which individuals identify issues and recommend suggestions for improvement in a timely manner will avoid delay and increase overall satisfaction with the project. Project administrators should realize that consensus of

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agreement may be more useful in moving a project forward than attempting to achieve complete agreement.

- The speed of the entire process was swift, impacting staff workload. The grant period required a quick start, with only a year and a half to evolve the award and distribute the dollars. This was no small challenge. The intensity and short time frame resulted in additional work effort and demand on participants' schedules. The impact of these large scale projects on the workforce simply needs to be acknowledged and planned for.

Recommendation: Don't underestimate the demands on time and resources and plan accordingly. Administrators should be aware of these increased demands and prepare those involved for the complexity and consequent learning curve prior to implementation. They should also consider how they might redistribute staff assignments and priorities in light of other department demands. Comprehensive campuses should consider an internal grant officer for their nursing programs.

Several actions were necessary to make this initiative successful, including:

- A committed core group that focused on building a more collaborative culture across and within the UW System. This group consisted of deans who have nursing doctoral programs: UW-Eau Claire, UW-Madison, UW-Milwaukee, and UW Oshkosh. The UW System nursing programs have a long history of successfully working together on prior projects. The collaborative relationships already in place strengthened the likelihood of success for this new initiative. The momentum necessary for success was sustained by the deans' active participation in all phases of the project. Additionally, our grant coordinator shepherded the process from inception to implementation, supporting the deans, project director, liaisons and

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all campus leads, and facilitating the communication critical to this enterprise as outlined in models 1 and 2.

- The collaborative and dedicated leads within and across the four campuses brought specialized skills and knowledge to the process, ensuring that issues could be identified and resolved prior to and during implementation.
- Data published by the Wisconsin Center for Nursing (WCN) was used to validate the nurse educator shortage and its implication for Wisconsin's workforce and citizens. WCN collects workforce information as mandated by Chapter 106.30 of the Wisconsin Statutes. All RNs in Wisconsin complete a survey as a requirement for their biennial license renewal. The project application specifically relied upon statistics derived from the Wisconsin Registered Nurse Survey 2012 Report and Wisconsin Nursing Education and Nurse Educator Faculty: 2012 Survey Results.
- The comprehensive, multi-faceted marketing campaign targeting Ph.D. and DNP candidates, postdoctoral candidates and faculty loan repayment participants not only engaged the audiences but also conveyed project synergy.

### **Assessing Accomplishments**

The assessment plan was submitted with the application, and included benchmarks for measurement. The evaluation of the plan will be completed at the end of the project. A mid-project status report was submitted to UW System July, 2014. Initially, the project goal was to award four postdoctoral fellowships and fund eighteen loan repayment faculty participants by June, 2014. In actuality, one postdoctoral fellowship was awarded and five faculty awards negotiated at hire. We did not anticipate awarding predoctoral fellowship during the first fiscal

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year of the project, however, due to rolling admissions and variable program start dates at the different campuses, twenty-nine (29) predoctoral fellowships were disbursed.

An evaluation team composed of the project director and a liaison from each campus will complete the final assessment. The final assessment of the Nurses for Wisconsin project will be disseminated to the UW System Board of Regents, specifically the Research, Economic Development and Innovation (REDI) Committee, as well as the Chancellors and Provosts of the participating campuses. Upon completion of the project director's contract, the respective dean's offices and grant accountant will maintain oversight of the awardees and distribution of funds.

### **Conclusion: Keeping Momentum**

It is important that within our state we keep momentum alive for Nurses for Wisconsin. Though this is a sizable award, going forward we will need much more funding and support to address both nurse and nurse educator shortages in Wisconsin and to secure health care for its citizens. This will mean pursuing both private and public funding, as well as working with legislators to increase the number of funded nursing faculty positions.

The strong relationships that this project has forged among the UW campuses positions us well to build on past successes, face current challenges and embrace new opportunities. We are aware of the keen interest generated by our success in obtaining a grant for nursing education, and our hope is that this publication will help other states in pursuing their own initiatives.

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### **Highlights**

- State incentive grant presented an opportunity for the University of Wisconsin System nursing colleges with doctoral programs to create a pipeline for nurse educators
- Nurses for Wisconsin was awarded 3.2 million dollars to fund pre-doctoral, postdoctoral fellowships and loan forgiveness for faculty hire
- Mid-project evaluation indicates predoctoral fellowship awards exceeded projected number of awardees while postdoctoral and faculty loan repayment participants lagged behind expected outcomes
- Implementation of this multidimensional, multisite award presented challenges
- Final evaluation of this initiative will be presented in a subsequent article